The front cover of this year’s Almanac was inspired by the Collins Dictionary and Oxford Dictionaries words of the year. As these new and notable words capture the zeitgeist of the year that was, it felt apt that they appear on our cover.

**COLLINS DICTIONARY WORD OF THE YEAR**

**Single-use**
*Adjective*: made to be used once only

**SHORTLIST**

**Backstop**
*Noun*: a system that will come into effect if no other arrangement is made

**Floss**
*Noun*: a dance in which people twist their hips in one direction while swinging their arms in the opposite direction with the fists closed

**Gammon**
*Noun*: a person, typically male, middle-aged, and white, with reactionary views, especially one who supports the withdrawal of Britain from the European Union

**Gaslight**
*Verb*: to attempt to manipulate (a person) by continually presenting them with false information until they doubt their sanity

**MeToo**
*Adjective*: denoting a cultural movement that seeks to expose and eradicate predatory sexual behaviour, especially in the workplace

**Plogging**
*Noun*: a recreational activity, originating in Sweden, that combines jogging with picking up litter

**VAR**
*Abbreviation*: video assistant referee

**Vegan**
*Noun*: a person who refrains from using any animal product whatever for food, clothing, or any other purpose

**Whitewash**
*Verb*: to cast a white actor in the role of (a character from a minority ethnic group) or to produce (a film or play) using white actors to play characters from a minority ethnic group

**OXFORD DICTIONARIES WORD OF THE YEAR**

**Toxic**
*Adjective*: poisonous
JUST OVER THREE-QUARTERS OF BRITONS (78%) SAY THEY LACK CONFIDENCE IN THE PRIME MINISTER TO GET A GOOD DEAL IN BREXIT NEGOTIATIONS
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IN 1948, WHEN THE NHS WAS FOUNDED, 75% OF THE PUBLIC THOUGHT THE NEW HEALTH SERVICE WAS A GOOD THING. SEVENTY YEARS ON IT’S 87%
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79% of heterosexual people said they would do something if they saw a member of the LGBT community being verbally abused in the street because of their sexuality.
Welcome to our review of 2018, a year filled with seemingly unending arguments about Brexit – and potentially one of many to come. Overall, the British remain personally upbeat, with the ONS recording rising personal happiness, and (perhaps) record employment contributing to this. Yet the public are anxious about the state of the country as a whole. They are negative about Brexit’s impact on their own finances and the country’s. There is record concern about poverty and inequality, and 62% say they would pay more taxes to end austerity. There’s a widespread feeling that the young face an uncertain future. Most of us think we have a housing crisis in Britain. Economic confidence is the lowest it’s been since 2011.

However, it’s nearly Christmas, and so I’m going to focus on the positives. The first is that, in 2018, Britons continue to believe we have more that unites us than divides us. While 61% believe people these days are angrier than in the past, they are actually less likely to think so than before the Financial Crash in 2007, when 72% believed everyone was getting angrier.
We may be divided into ‘Anywheres’ or ‘Somewheres’, but most of us still trust each other and experts – if anything more so than in the past. Our Annual Veracity Index has found no collapse in trust in our politicians – it’s just as low as it was back in 1983 when we first asked the question. In fact, trust in most professions, including journalists, has been rising over the last decade (apart from the clergy, who have fallen from grace).

British institutions such as the monarchy, BBC and armed forces remain popular. Nearly all of us (87%) thought the NHS was a good thing as it celebrated its 70th birthday this summer, while the BBC got record audiences for its new dramas, like The Bodyguard. The Royal Wedding in May showed how traditional British institutions are adept at modernising themselves – this year 87% of us are favourable to Prince Harry, 85% to the Queen herself.

While our innate predilection for immediate threats and bad news stories has helped us survive for thousands of years, in general things are better than we think they are (without being complacent!), just as our Perils of Perception studies show.

Globally, our reputation among the public is holding up in the National Brand Index Study – the UK remains one of the most well regarded countries on the planet. We may still shoot ourselves in the foot, but there is still a lot to be positive about.
We have chosen some of the ‘Words of Year’ for 2018 to feature on the front cover of this edition. These words – ‘sing-use’, ‘vegan’, ‘MeToo’, ‘whitewash’, ‘plogging’ (the practice of picking up litter while out jogging) – illustrate our desire as a nation to change and improve the things around us. Maybe the world isn’t going to hell in a handcart after all.

We’re not content to rest on our laurels here, either. This year our Almanac tackles topics as diverse as the NHS at 70; the financial sector in the wake of ‘Open Banking’; how brands can best use Siri, Alexa and Google Home; the rate at which women are taking their place at the boardroom table; whether our high streets really are on their last legs; and if the youth of today are more mild than wild.

All that remains for me is to wish you and your family our best wishes for Christmas and for 2019 – which we will be scanning, analysing and measuring as ever! Next year will undoubtedly hold even more surprises, but I hope it’s a good one for you and yours.

Ben Page
Chief Executive, Ipsos MORI
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In the first week of September, “class war” was spray-painted on a fresh road surface in Wentworth Road, Oxford. The motive was disgust at the laying of new Tarmac at the ‘posh’ end of the street at the point where a wall (taken down in 1959) used to divide the Cutteslowe estate from private housing.

The cultural theorist Raymond Williams famously said “culture is ordinary”, and what could be more ordinary than a street. Unfortunately, this sense of ‘other’, of winners and losers, of division, is not unique to Wentworth Road. 2018 showed Britain divided in several ways, including social mobility, wealth and even life expectancy. In the year the #metoo campaign marked its first anniversary, a febrile Britain feels increasingly #UsNotThem.

A huge 85% of Britons in 2018 think the country is divided, nine points higher than the global average across 27 countries. But at a local level, the proportion who agree that people in their neighbourhood pull together to improve things has changed little in recent times. So too has the sense that people from different backgrounds get along well together. But there...
has been a gradual decline in trust in local people, and in borrowing things and exchanging favours with neighbours.\textsuperscript{06}

Importantly, the country feels it is becoming more divided. Seventy-three per cent think Britain is more divided than ten years ago; this time, 14 points higher than the global average. With neat symmetry, 2018 was the tenth anniversary of the collapse of Lehman Brothers, an event which sparked a global depression, a stinging period of austerity and a populist surge, driven in part by ‘nativist’ sentiment.

Living standards have flatlined (for most), and the focus on the ‘jilted’ younger generation has intensified.\textsuperscript{07} The gap between the haves and have-nots was laid bare recently by the IFS, whose analysis found an incredible one in six
<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
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<tr>
<td>Total</td>
<td>76%</td>
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<td>Serbia</td>
<td>93%</td>
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<td>Argentina</td>
<td>92%</td>
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<td>Chile</td>
<td>90%</td>
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<td>Peru</td>
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<td>Italy</td>
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<td>GB</td>
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<td>Poland</td>
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<td>Mexico</td>
<td>78%</td>
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<td>S Korea</td>
<td>77%</td>
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<tr>
<td>France</td>
<td>75%</td>
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<td>Australia</td>
<td>70%</td>
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<td>India</td>
<td>66%</td>
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<td>Turkey</td>
<td>65%</td>
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<td>Canada</td>
<td>62%</td>
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<td>Malaysia</td>
<td>59%</td>
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<td>Japan</td>
<td>52%</td>
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<tr>
<td>China</td>
<td>48%</td>
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<td>Saudi Arabia</td>
<td>34%</td>
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55-64 year-olds own a second home, whereas the real incomes of 25-34 year-olds have improved by only 19% over 20 years – compared to a 173% increase in house prices.08

The squeeze has not just been confined to the young; nationally, households are putting the smallest proportion of their disposable incomes into savings since the 1960s.09
Britain: a hostile environment?

Britain is downbeat and critical. Seventy per cent think the country is on the wrong track, while a similar 72% were dissatisfied with the government in September, higher than at any point since June 2009. Ipsos MORI’s Economic Optimism Index averaged -27 in the 22 times we’ve measured since the Brexit vote (it was +7 across the 22 before it). Brexit dominates Britain’s bandwidth. In our October Issues Index, 48% of people identified it as the single biggest issue – September’s 49% was the highest since those citing ‘the economy’ during the depths of the recession in 2011.

This is not to say that the British have entirely lost their famed resilience and ‘mustn’t grumble’ outlook. There have been some relatively unifying moments this year – England’s World Cup performance (at least in England!), the wedding of the most popular member of the Royal Family, and Armistice Centenary come to mind – and Britons’ average happiness rating is actually on an upwards trajectory. But as Bobby Duffy has shown, the gap between perceived and reported happiness in Britain, as elsewhere, is huge (we think we are gloomier than we actually are).

Duffy describes the misperceptions identified by our studies as “painting a picture of denial and self-delusion, combined with a dangerous focus on eye-catching scare stories”. We have an innate tendency to think things are worse now than in the past, even when they are virtually unchanged. The past is attractive especially when the present looks uncertain.
but, for example, there was serious concern in the 1970s about Britain being ‘ungovernable’ and rife with division.\textsuperscript{12}

These are not uniquely British problems. Tim Marshall describes a “new age of division” manifest in the construction of thousands of miles and walls and fences in the twenty-first century. He warns this is shaping politics at every level – the personal, local, national and international – and of an ‘us and them’ mindset taking hold.\textsuperscript{13}

The challenge is that nightly debates about Brexit, and the cultural divides behind it, work to remind us daily of these divisions. But more positively, Britons are, by a margin of six to one, more likely to think that mixing with people from other backgrounds, cultures or points of view has more positive impacts than negative ones. More favour the country taking further steps to open itself up to today’s world, rather than a protectionist approach to close ourselves off. And 70% think that people across the world have more in common than things that divide them.
But this is where the bad news comes back in. Mixing with people and finding commonalities despite differences is evidently harder in a ‘more filtered’ world. In the new attention economy we spend more time in self-constructed echo chambers, interacting with people like us. Again, we are deluded; in Britain, 70% think other people live in their own internet bubble, but only 30% think that they themselves do.

While the theory of ‘cognitive dissonance’ – essentially, the discomfort experienced by someone who has inconsistent or challenged thoughts, beliefs or values – is not new and has been around since the 1950s,14 Twitter and Facebook have admitted that when they have tried to deliver more content from an opposite view, people tend not to click on it.

The business model of the attention economy includes distraction, humour and outrage,15 creating a sensationalist, shrill, fast-paced, black-and-white, good-and-evil, us-and-them frame. This year, the Prime Minister (and Donald Trump) called for more “civility”, playwright James Graham described a “conversation crisis in public and civic life”, and NHS Chief Simon Stevens advised on a growing ‘epidemic’ of childhood anxiety because of social media.16

The worry is that politics isn’t keeping up. Academic Meg Russell argued that cultural forces including adversarialism and turbo-consumerism are undermining politics. Culture demands something different to the messy, complex and imperfect nature of politics (evident in extremis in the Brexit negotiations!). Her central point in her book ‘Must Politics Disappoint’ is that the essential qualities of politics – negotiation, compromise and an airing and sharing of issues and problems – is “hidden from view”.17 But, what year did Russell write this? 2005.
Today, Brexit – years in the making – is short-hand for division. It has held up a mirror to our malaise, making it even harder to avoid the cultural equivalent of a doom loop,\(^\text{18}\) where division breeds division and so on and so forth.

In these testing, unsettling times, researchers, policy-makers and brands need to build cultural relevance through insightful research.\(^\text{19}\) But we need to go further still. Somehow we need to change as well as reflect culture. All of us – from politician to tech giant to social media user – should be mindful of the cultural consequences of what we say and the tone we use.

A more positive view is often more powerful in effecting change. Imagining and creating a less hostile environment is something we can unite and get behind. The stakes could not be higher... ●

To get in touch with Ben, please email ben.marshall@ipsos.com
2018 IN POLITICS: A YEAR OF SOUND AND FURY, SIGNIFYING ... ANYTHING?

BY GIDEON SKINNER
Head of Political Research
Before the dramatic response to the announcement of the draft Withdrawal Agreement on 14th November, you might have been forgiven for thinking, despite all the intense political debate this year, that not much has changed in the polls during 2018. The two main parties ended the year much as they started it, with neither able to open up a clear lead over the other, and there is little sign of a break-through from any of the other parties either.

Back in January, the Ipsos MORI Issues Index showed that two topics were dominating public concerns: the NHS and Brexit. In October, the exact same two were still well ahead of all the others.

However, the public hasn’t remained totally unmoved by all the Westminster political theatre. First of all, the very fact that we remain divided into two political blocs is notable. Age remains one of the starkest dividing lines: in January younger people were twice as likely to vote Labour than older people, and half as likely to vote Conservative – and that is still the case at the end of the year. The country is divided on cultural lines as well as the traditional left-right ones. When asked if they believe European immigrants contribute more in taxes than they take out in benefits and public services, Leave voters – whether Conservative or Labour – are about twice as likely to say immigrants receive more than they put in. In fact, according to the recent Migration Advisory Committee report, EEA migrants as a whole are estimated to have paid £4.7bn more in taxes in 2016/17 than they received in welfare payments and public services.

DURING 2018, PUBLIC SATISFACTION WITH THERESA MAY FELL FROM A HIGH OF 41% IN MARCH TO 29% IN OCTOBER
Beyond the headline figures, there is more evidence of change – to the detriment of both parties, as the public declares a plague on both their houses. During 2018, public satisfaction with Theresa May has fallen from a high of 41% in March to 29% in October. Dissatisfaction with her government has also grown to 70%, the worst for any government since 2009. Perceptions of the Prime Minister are a long way from her honeymoon period in 2016 to early 2017: only one in three think she has what it takes to be a good Prime Minister, and her ratings on attributes such as being capable, having sound judgement, and being out of touch have all worsened.

The one aspect in Theresa May’s favour is that the public aren’t throwing any bouquets to any of her potential challengers either. None of her possible rivals from within the Conservative party are seen as better Prime Ministerial material, and on the Labour side, Jeremy Corbyn’s ratings have also fallen during 2018. In January, 38% were satisfied with him, but that has now fallen to 28%, among Labour supporters his ratings have also fallen by
2018 in politics: a year of sound and fury, signifying ... anything?

**ARE THE PUBLIC LOSING FAITH IN THE CONSERVATIVES’ LONG-TERM ECONOMIC PLAN?**

On balance do you agree or disagree with the following statement: in the long term, this government’s policies will improve the state of Britain’s economy? % agree

![Graph showing public opinion on economic policies over time]

Source
Ipsos MORI
Political Monitor
Base
c.1,000 British adults each month

...ten points [Mrs May has suffered this even more acutely among Conservatives, falling almost 20 points among her own voters].

While Labour has extended its lead over the Conservatives as the most liked party, that affection doesn’t wholly extend to its leader. One in three say they like the Labour party but not Jeremy Corbyn, suggesting that although he is popular among young people, others are voting for the party despite its leader, not because of him. Of course, the Labour leader has been able to turn around these perceptions before – witness his performance during the 2017 election campaign where he almost wiped out Theresa May’s lead over him. At the very least, though, he is going to have to persuade people again, and he may be judged differently in the next election than he was in 2017.

However, there is one clear change in public attitudes that Labour should be able to turn to its advantage. The tide has turned against austerity – no longer do the majority believe that...
there is a real need to cut spending on public services in order to pay off the national debt. Instead, two in three [and even a majority among Conservative supporters] say the government should increase spending on public services, even if that means higher taxes or more government borrowing. The trouble for the Chancellor and Prime Minister, though, is that only one in four believe they actually will increase spending – which means her claim that austerity is over could end up being a millstone around their neck. This is in the context of falling economic optimism – six in ten expect the economy to get worse over the year, the most pessimistic since 2011, which means the Conservatives need to start worrying about their reputation for economic competence. After rising between 2010 and 2015, confidence in the government’s long-term economic strategy has been falling every year since then, and although they maintain a healthy lead over Labour as the party most trusted on the economy, the gap is narrowing [much as it is over Brexit].
2018 in politics: a year of sound and fury, signifying ... anything?

ONE IN THREE SAY THEY LIKE THE LABOUR PARTY BUT NOT JEREMY CORBYN, SUGGESTING THAT ALTHOUGH HE IS POPULAR AMONG YOUNG PEOPLE, OTHERS ARE VOTING FOR THE PARTY DESPITE ITS LEADER, NOT BECAUSE OF HIM

2018, then, saw both Theresa May and Jeremy Corbyn lose some of their stardust, and neither of their parties are displaying much evidence that they will attract new audiences. 2019 will show whether each side just continues to rely on the other’s bad reviews, or if they can come up with new lines to win their own standing ovation. Meanwhile, of course, Brexit could prove to be the ghost at the feast. In which case, Mrs May’s lines in particular would need to be rewritten. ●
BY GIDEON SKINNER
Head of Political Research

Here are some of our favourite charts from our monthly Political Monitor poll, which help put the politics of 2018 in perspective.
2018 politics in perspective

**AGE REMAINS A KEY DIVIDING LINE BETWEEN THE PARTIES**

How would you vote if there were a general election tomorrow?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Labour</th>
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<tbody>
<tr>
<td>18-24</td>
<td>64%</td>
</tr>
<tr>
<td>25-34</td>
<td>54%</td>
</tr>
<tr>
<td>35-44</td>
<td>42%</td>
</tr>
<tr>
<td>45-54</td>
<td>34%</td>
</tr>
<tr>
<td>55-64</td>
<td>34%</td>
</tr>
<tr>
<td>65-74</td>
<td>23%</td>
</tr>
<tr>
<td>75+</td>
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</tbody>
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Which of these statements comes closest to your views of Jeremy Corbyn and the Labour party?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like him</td>
<td>64%</td>
</tr>
<tr>
<td>I don’t like him</td>
<td>32%</td>
</tr>
<tr>
<td>I like the party</td>
<td>57%</td>
</tr>
<tr>
<td>I don’t like the party</td>
<td>39%</td>
</tr>
</tbody>
</table>

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How satisfied or dissatisfied are you with the way ... is doing his/her job as leader of the ... party?

---

**Corbyn**

[Graph showing satisfaction and dissatisfaction over time]

**Previous opposition leaders**

- **NET SATISFACTION**
- **NET DISSATISFACTION**

---

Base:*

Base:**

Base:**

Base:**

Base:**

NUMBER OF MONTHS AFTER BECOMING OPPOSITION LEADER

28
Which of these statements comes closest to your views of Theresa May and the Conservative party?

- 39% I like her
- 57% I don’t like her
- 38% I like the party
- 58% I don’t like the party

How satisfied or dissatisfied are you with the way ... is doing his/her job as Prime Minister?
85% ARE CONCERNED ABOUT THE EFFECTS ON THE ENVIRONMENT OF PLASTICS
It took Sir David Attenborough, the national treasure, to expose the plastic waste crisis and wake the conscience of the British public. A plea at the end of the final episode of the BBC’s Blue Planet II program, which was watched by 14 million people, resulted in internet searches for ‘plastic recycling’ to rise by 55%. But will this information search convert to action?

Even before the airing of this programme, consumers expressed concern about the environment, with two-thirds (67%) of the British public believing that we are heading for an environmental disaster unless we change our habits quickly. Four in ten (41%) of the British public say that they are ‘very concerned’ about the effects on the environment of plastics and other disposable objects which cannot be recycled. This figure is at least 16% higher for consumers over 53 years old (50%) than those aged 16-38 years old (34%). It is no wonder, then, that ‘single-use’ was named the 2018 word of the year by Collins Dictionary.
Consumers often see themselves as passive bystanders in the recycling chain, buying what is put on the shelves and then disposing of the left-over packaging as best they can [when it is convenient and easy to do so]. We put the onus on companies that produce packaged goods (27%) and those selling packaged goods (13%) to find a way to reduce the amount of unnecessary packaging. Some 40% do see it as a joint responsibility between manufacturers, retailers, government and consumers, although when something becomes everyone’s problem, it often becomes no-one’s.

The often complex and multi-layered packaging formats in our shops have been designed by the food and drink industry to play our wants and needs. The desire for a frictionless and on-the-go lifestyle is creating a demand for convenience – with packaging formats often utilising laminates and plastics which cannot be readily recycled. Are we ready to give up convenience for the environment?

There are periodic Twitter storms – like the Whole Foods pre-peeled orange back in 2016 or this year’s ‘Cauliflower Steak’ (two slices of cauliflower with a lemon wedge for £2) which was hastily withdrawn from shelves following consumer outrage on social media – but progress is being made, mostly driven by industry and government initiatives.

Many retailers have made significant pledges to reduce or eliminate the use of single-use plastics. Iceland, for example, announced at the beginning of 2018 that their own label products would be plastic-free by 2023. Marks & Spencer’s ‘Plan A’ is working towards a single polymer for all their plastic packing to facilitate effective recycling in homes. Morrisons have removed plastic trays from some fruit and vegetable packaging, saving 85 tonnes of packaging a year, and invite customers to bring their own reusable boxes in to use at their fresh meat and fish counters.

The levy on plastic bags, first introduced in 2015, was further extended by the government in January this year to all shops in the UK as part of its 25-year environmental plan. Some retailers such...
as Asda, Morrisons, Aldi and Lidl have gone further and plan to remove single-use carrier bags from their stores by the end of 2018.

Maybe we can make faster progress. The number of single-use bags has been reduced by more than 80% in England, following the levy by government.

Michael Gove’s announcement of a Deposit Return Scheme (DRS) for all single-use drink containers by the end of the year [now delayed to 2020] should also have been a welcome move, given that just under half of the plastic bottles we use in the UK end up in landfill.27

**WHOSE PROBLEM IS PACKAGING WASTE?**

Who, if anybody, do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold?

- Companies that produce packaged goods: 27%
- Companies that sell packaged goods: 13%
- Government: 11%
- Consumers: 3%
- All of the above equally: 40%
- Nobody has a responsibility to do this: 0.4%
- Don’t Know: 5%
For industry, building recyclability into the design process from conception will go a long way to pro-actively solving the environmental challenge of packaging. Encouragingly, almost half of us (45%) say we would be willing to pay more for products that do not harm the environment, though solutions need to be straightforward and simple.

Will science solve the problem for us? This fantasy became more of a reality this year with the accidental discovery of an enzyme [named PTase] which can break down plastic drinks bottles. But while this is a start, what is apparent is the need now for a monumental focus across industry and government to continue to find new and more radical solutions to help us save the planet for future generations.

THE NUMBER OF SINGLE-USE BAGS HAS BEEN REDUCED BY MORE THAN 80% IN ENGLAND, FOLLOWING THE LEVY BY GOVERNMENT

Sir David Attenborough as the conscience of the nation

To get in touch with Pippa, please email pippa.bailey@ipsos.com
THE QUEEN AND PRINCE HARRY ARE THE MOST LIKED MEMBERS OF THE ROYAL FAMILY OVERALL AROUND THE WORLD, BUT HARRY IS THE FAVOURITE IN BRITAIN.
Move over Millennials. A new, fresher-faced generation are hitting the limelight. Born after 1995, Generation Z are blossoming into adulthood and everyone wants to know what they’re going to do next. Trying to prevent the jaded stereotypes that dogged the Millennial reputation, this year we explored what we know about Gen Z now, and what we can expect from them in the future in our new report: Beyond Binary – The Lives and Choices of Generation Z.

Like any generation, Gen Z are complex, diverse and multifaceted. But the first question our clients always ask is “what are they actually like?”. And this can mean many things, but one of the main accusations levelled at them takes a swipe at their street cred – “they’re too nice, they’re boring”, “the teenage rebel is dead”. It’s a negative spin on what is actually pretty positive data.

It’s absolutely true that over the past decade we have seen consistent declines in typically ‘bad’ or ‘rebellious’ behaviour among young people. Compared to Millennials at the same age,
Naughty or nice – has the youth gone mild?

**GEN Z IN MANY COUNTRIES DRINK LESS, SMOKE LESS, TAKE DRUGS LESS, ENGAGE IN SEXUAL ACTIVITY LESS AND COMMIT LESS CRIME**

Generation Z in many countries drink less, smoke less, take drugs less, engage in sexual activity less and commit less crime.

One of the biggest changes – particularly shocking to a nation known for its drinking – is children’s relationship to alcohol. In 2000, two thirds (72%) of Millennial teens (aged 13-15) had tried alcohol. Fast forward to 2016 and only 36% of 13-15 year old Gen Z had tried alcohol. This trend is mirrored across Europe and America – in the US 60% of high school students (aged 14-18) had tried an alcoholic drink in 2017, much lower than the 81% of Millennial high schoolers in 1999.

With most things that represent a real shift, there’s a danger that we take this difference and we run a mile too far with it. The pictures of boring youths staying home knitting and eating kale that frequently accompany media stories about Gen Z are evidence of our propensity to do this.

The reality is that this widespread phenomenon of better behaviour is complex and due to many interlinked factors. A number of plausible reasons have been suggested for the shift, such as digital realms providing alternative outlets to hanging around on the street; the economic climate restricting the amount of money young people have to be handing over to their local drug dealer or the pub; reforms in education and policing.

But it is important to note that all of these represent external barriers to bad behaviours, rather than any internal desire among young people today to behave like angels. If this was a permanent switch to good behaviour we would expect [and did expect] to
GEN Z ARE LESS WORRIED ABOUT RISKY BEHAVIOUR THAN MILLENNIALS AT THE SAME AGE – EXCEPT BINGE DRINKING
% think is very risky

**GEN Z IN 2018**
**AGED 11-15 YEARS**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking heroin</td>
<td>86%</td>
</tr>
<tr>
<td>Taking cocaine</td>
<td>85%</td>
</tr>
<tr>
<td>Taking dance drugs e.g. ecstasy, speed</td>
<td>77%</td>
</tr>
<tr>
<td>Smoking cannabis</td>
<td>72%</td>
</tr>
<tr>
<td>Binge drinking</td>
<td>70%</td>
</tr>
<tr>
<td>Smoking cigarettes</td>
<td>56%</td>
</tr>
<tr>
<td>Sniffing solvents or glue</td>
<td>64%</td>
</tr>
<tr>
<td>Having sex without using a condom</td>
<td>57%</td>
</tr>
<tr>
<td>Walking alone at night in an area strange to you</td>
<td>57%</td>
</tr>
<tr>
<td>Having an alcoholic drink</td>
<td>28%</td>
</tr>
<tr>
<td>Having sex using condoms</td>
<td>15%</td>
</tr>
</tbody>
</table>

**MILLENNIALS IN 2004**
**AGED 11-15 YEARS**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking heroin</td>
<td>89%</td>
</tr>
<tr>
<td>Taking cocaine</td>
<td>90%</td>
</tr>
<tr>
<td>Taking dance drugs e.g. ecstasy, speed</td>
<td>83%</td>
</tr>
<tr>
<td>Smoking cannabis</td>
<td>84%</td>
</tr>
<tr>
<td>Binge drinking</td>
<td>70%</td>
</tr>
<tr>
<td>Smoking cigarettes</td>
<td>76%</td>
</tr>
<tr>
<td>Sniffing solvents or glue</td>
<td>76%</td>
</tr>
<tr>
<td>Having sex without using a condom</td>
<td>76%</td>
</tr>
<tr>
<td>Walking alone at night in an area strange to you</td>
<td>63%</td>
</tr>
<tr>
<td>Having an alcoholic drink</td>
<td>67%</td>
</tr>
<tr>
<td>Having sex using condoms</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Source**
Young People's Omnibus, 2018/Nestlé Family Monitor Survey of Young People's Attitudes 2004

**Base**
c.30 11-15 year olds, 5 Feb - 6 April 2018
Naughty or nice – has the youth gone mild?

see a change in perception among young people about how risky these behaviours are. Our findings surprised us.

New data shows that Generation Z school kids are less worried about lots of types of bad behaviour. They’re less likely to think smoking cannabis, taking heroin or dance drugs, or even walking alone at night is risky. This more blasé attitude indicates that it’s not that they are choosing to avoid these types of behaviour out of a more conservative sense of danger or risk. It’s something else.

The only behaviour that truly seems to be truly embedded into a sense of concern is binge drinking. School kids are far more likely to think getting blind drunk is very risky than Millennials did [70% compared to just 56%]. And 28% think even just having one drink of alcohol “is very risky”.

This means that society cannot rest on its laurels. Other than perhaps a disinterest in drinking their own bodyweight, these behaviours may not represent a change of heart that will continue into the future. Gen Z are mild for now, but is that just because their wilder side is clipped?

But to be fair to them, they are quite nice in a number of different ways. They’re far more trusting. Analysis of our polling on trust showed a stunning cohort shift in trust levels between British Generation Z and Millennials. Generation Z are nearly twice as trusting of other people than Millennials were at the same age [61% in 2017 compared to 36% in 2002].

They’re also less motivated by money. Despite pressure of a harder economic context, there has been a cohort shift away from materialistic values. Less than a third [30%] of schoolchildren feel the things they own say a lot about how well they are doing in life, compared with 42% in 2011.

So, in short, they are actually quite nice. For now. ●

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TWO-THIRDS OF BRITONS (66%) WOULD NOT BE CONCERNED AT ALL IF A MEMBER OF THE ROYAL FAMILY WERE TO MARRY SOMEBODY OF THE SAME SEX.
In 2018 we celebrated 100 years of women’s suffrage in the UK and saw a statue of suffragist and feminist icon Millicent Fawcett unveiled in Parliament Square.

While the centenary milestone has been celebrated, the media has been dominated by stories of gender inequality both in and outside of the workplace. #timesup and #pressforprogress campaigns made waves on social media and throughout society, particularly around the first mandatory publication of gender pay gaps in April. This has prompted us to take stock, and look at the role and perception of women in the workplace, and more specifically in the boardroom.

Though the number of senior executives in our Captains of Industry survey of FTSE 500 businesses who agree that their company is actively trying to increase the number of women on their main boards has gone up since 2016 (71% now compared to 64%), there is no actual, meaningful improvement in board representation. The average representation of women on FTSE 350 boards currently stands at 26.6%, compared to 24.5% in 2017. There are currently
only 82 companies from the FTSE 350 who have achieved the Hampton Alexander Review target of 33% representation. It is clear that, while rhetoric may be improving, there is less real change at the top. In fact, this rhetoric may be contributing to the significant public misperceptions around equality for women in the boardroom.

In partnership with International Women’s Day, our study found that the general population hugely overestimates the extent to which women are represented in business leadership. Britons are more accurate than most other countries surveyed, but they still estimate that 12% of CEOs in the largest 500 companies around the world are women, when the actual figure is just 3%. Indeed, this year there were as many CEOs named Dave as there were female CEOs in FTSE 100 companies.

The pace of change on pay and economic equality is also hugely overestimated. In Britain, people think equal pay will be achieved by 2035, whereas the World Economic Forum has estimated it will take 82 years longer – with parity finally being reached in 2117.

Perhaps most demonstrative of how far there is to go is the lack of female faces among the ‘most admired business people’ in the UK, as recorded in our Captains of Industry survey. Dame Carolyn McCall, Chief Executive of ITV, is the

**WE VASTLY OVERESTIMATE PROGRESS IN ACHIEVING EQUAL PAY**

At the current rate of progress, in which year will men and women have equal pay?

<table>
<thead>
<tr>
<th>AVERAGE GUESS</th>
<th>GAP</th>
<th>REALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UK</strong> 2035</td>
<td>82 years</td>
<td>2117</td>
</tr>
<tr>
<td><strong>USA</strong> 2028</td>
<td>31 years</td>
<td>2059</td>
</tr>
</tbody>
</table>

Source
Ipsos MORI and International Women’s Day World Economic Forum

Base
19,428 adults
18-64 in US and Canada and 16-64 in all other countries, online, 26 Jan-9 Feb 2018
only woman named in the top 10 this year, ranking behind the likes of Sir James Dyson and Sir Richard Branson.

Optimistic perceptions of reality and potential for progress have a complicated relationship. We need to think that things have got better to believe that we can further improve them. But we cannot let optimism make us complacent. The general public’s perceptions of women in business leadership and equal pay may, therefore, be a double-edged sword. However, the reality is that women in the workplace and the boardroom have not seen much of an improvement. But is the #pressforprogress and bosses’ apparent commitment to boardroom diversity a sign of better things to come? This year’s mandatory gender pay gap reporting might just have kickstarted the right conversations in the boardroom and beyond.

To get in touch with Katherine, please email katherine.shipton@ipsos.com
Fake News was word of the year in 2017, but saw continued popularity in 2018. In September, Twitter joined YouTube, Apple and Facebook in banning the accounts of Alex Jones of Infowars for spreading hate speech and inciting violence. For years Jones, a peddler of numerous conspiracy theories, waged a campaign to paint school shootings, particularly the 2012 Sandy Hook school shooting, as ‘false flag’ operations – coordinated fake events used as an excuse to impose gun controls. The pernicious campaign saw the spread of misinformation and lies, by his supporters, about the families of murdered children. It remains one of the most extreme examples of the damage that can be caused by fake news.

Three out of five of us (60%) say we regularly see deliberately fake reports in media, and nearly half of us (48%) have believed a story that we later found out was false. It appears that this tide of fake news, amongst other issues, has eroded trust in social media and search engine companies. In 2016, our Global Trends data showed that social media companies are some of the least trusted brands, with 55% of respondents across 23 countries.
saying they did not trust them to use personal information correctly. In Britain this increased to two thirds (66%). This lack of trust extended into other areas, such as how they treat us – only 40% of Britons trust social media sites to treat us fairly.\(^4^4\) The generation who spend the most time online are less trusting of the content they see – or perhaps just more savvy and aware of the amount of fake news in circulation. While Generation Z, those born after 1995, appear to be more trusting of institutions generally than the generation before them (Millennials), this trust is not extended to social media. Only 24% believe that what they see on social media is entirely or mostly true (compared to 40% of Millennials in 2010 when they were the same age).\(^4^5\)

Politicians, echoing those they represent, have told the companies to take action.\(^4^6\) Social media and search engine companies have taken note of this and attempted to respond to the demand consumers have made. Nick Clegg went so far as to join Facebook – in his words to offer ‘a bridge’ between tech and politics.\(^4^7\) However, all this begs the question; what do we as consumers actually want these companies to do? Generally, public discourse has focused on highlighting the problem, with less engagement on creating solutions and, while proposals have been put forward in some quarters, the lack of legislation passed by politicians to date has meant that the companies have been left to their own devices to find solutions.

And that is what they have set about doing. Where once they sought to rely solely on algorithms to establish what was ‘trending’ news or engaging content, Facebook and YouTube now employ cohorts of human moderators who make decisions about content flagged by artificial intelligence. It is they who have the final say as to whether mendacious content should be removed, down-ranked, shown but with a note that the information is
false, shown but alongside accurate information, or simply left alone. They have developed their own guidelines and generally, in order to safeguard free speech, content is not taken down just because it contains fake news, but only if it strays into hate speech, incitement to violence or another grave offence.

They have also sought to improve their image through corporate social responsibility initiatives, such as Google’s Digital Garage program which offers free digital skills training. Facebook has used advertising campaigns to reiterate its positive role, like the ‘Let’s get to work’ campaign, which sought to highlight the benefits of the platform for connecting small businesses, or the ‘Here Together’ campaign which explicitly identifies fake news as ‘not OK’ and promises to return the platform to the values that saw it grow to be so successful in the first place.

All of this should leave us with a lot to think about as consumers. The vast majority of us (70%) use social media or search sites on a daily basis and they have fundamentally changed how we absorb information. For many of us they are a conduit for news and it is a reasonable expectation that these organisations have responsibility for the content that appears on their platforms. But in asking them to police what we see, we have also asked them to wrestle with some fundamental questions:

- Where are the limits of our freedom of expression online?
- What counts as hate speech?
- When can the public be relied upon to recognise fake news and when does it need to be explicitly identified?
- What is the barrier between news and satire?
Crucially there has also been limited exploration of who falls for fake news stories and why. Most of us think that fake news, filter bubbles and post-truth are things that affect other people much more than they affect us – 63% of people think they can spot fake news, but only 41% think the average person can. The challenge it poses to the likes of Facebook and Google, who are being forced to take on the role of moral arbiter in a culture that demands that speech be free but also policed, is a formidable one, as few cases will be as clear-cut as that of Alex Jones. If they are, as The Economist has previously put it, ‘well on their way to becoming “ministries of truth” for a global audience’, it is not because they sought the role, but because we asked them to take it.

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**Fake news and the fightback**

**WE THINK WE ARE BETTER AT SPOTTING FAKE NEWS THAN THE GENERAL POPULATION**

<table>
<thead>
<tr>
<th>Own behaviour</th>
<th>Perceived social norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>63%</td>
<td>41%</td>
</tr>
</tbody>
</table>

22% pt social norm gap

*The social norm gap is the difference between what individuals think others do versus what they tell us about their own behaviour

Source
Ipsos Global Advisor

Base
13,500 adults in 27 countries (aged 16-64 in US and Canada and 18-64 in all other countries), online, June 22–July 6 2018

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BEFORE THE TOURNAMENT BEGAN, JUST 3% OF PEOPLE GLOBALLY THOUGHT ENGLAND WOULD WIN THE WORLD CUP – AND ONLY 4% IN BRITAIN THOUGHT FOOTBALL WOULD COME HOME
2018 marked the 70th birthday of the NHS, and 87% of the public say they see it as a good thing, up from 75% in 1948, the year the NHS began. We also strongly support the founding principles of the NHS: that it should be a comprehensive service available to all, free at the point of delivery, and primarily funded through taxation. We don’t just value what it stands for – globally, Britons are among the most positive about the quality of healthcare services they have access to – rightly or wrongly.

However, the 70th celebrations this summer were against a backdrop of increasing financial pressures. When it comes to the future of the NHS, the public are largely pessimistic. In comparison with other countries, we are most positive about healthcare quality, but we are the most pessimistic country about the future of our healthcare – and over half think that the NHS won’t be free at the point of use in another 70 years’ time.
WE ARE NOT CONFIDENT ABOUT THE FUTURE OF THE NHS...

Over the coming years, do you expect the quality of healthcare that you and your family will have access to locally will improve, stay the same, or get worse?

<table>
<thead>
<tr>
<th>Country</th>
<th>Improve</th>
<th>Stay the Same</th>
<th>Get Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>34%</td>
<td>54%</td>
<td>12%</td>
</tr>
<tr>
<td>Colombia</td>
<td>66%</td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td>Peru</td>
<td>63%</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Brazil</td>
<td>61%</td>
<td>28%</td>
<td>11%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>57%</td>
<td>32%</td>
<td>9%</td>
</tr>
<tr>
<td>Chile</td>
<td>55%</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>Argentina</td>
<td>53%</td>
<td>30%</td>
<td>17%</td>
</tr>
<tr>
<td>India</td>
<td>53%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>49%</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>China</td>
<td>48%</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Mexico</td>
<td>47%</td>
<td>28%</td>
<td>25%</td>
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<tr>
<td>Turkey</td>
<td>44%</td>
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<td>Spain</td>
<td>44%</td>
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<td>S Korea</td>
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<td>Australia</td>
<td>22%</td>
<td>41%</td>
<td>36%</td>
</tr>
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<td>Belgium</td>
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<td>38%</td>
<td>40%</td>
</tr>
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<td>Russia</td>
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<td>39%</td>
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<td>US</td>
<td>18%</td>
<td>42%</td>
<td>38%</td>
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<tr>
<td>Poland</td>
<td>18%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Canada</td>
<td>15%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Japan</td>
<td>15%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Italy</td>
<td>14%</td>
<td>40%</td>
<td>45%</td>
</tr>
<tr>
<td>Hungary</td>
<td>12%</td>
<td>35%</td>
<td>45%</td>
</tr>
<tr>
<td>Germany</td>
<td>10%</td>
<td>26%</td>
<td>61%</td>
</tr>
<tr>
<td>GB</td>
<td>8%</td>
<td>17%</td>
<td>75%</td>
</tr>
</tbody>
</table>

**Source**
Ipsos Global Advisor

**Base**
23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018
Reflecting this public concern, in the week before the 70th anniversary the government announced a new funding settlement for the NHS totalling £20.5bn a year in real terms.

The public are keen to see the NHS funded properly, and say they would be willing to pay more taxes to fund the increase (after the announcement of further funding, 55% of the public said they would be willing to pay more tax). And they appear to have reasonable expectations about what the additional funding can deliver: half (49%) think 2018’s promised extra funding is enough to maintain the current level of NHS services, but not to lead to improvements. Only 14% think it is enough to lead to improvements.

**THE PUBLIC SEEM TO BE REALISTIC ABOUT WHAT INCREASED FUNDING CAN DO**

As you may know the Government has recently announced that it will be providing an extra £20 billion a year for the NHS for the next five years, an increase of 3.4%. When thinking about the effect this extra funding will have on the NHS, which of the following is closest to your opinion?

- **ENOUGH TO IMPROVE**
- **ENOUGH TO MAINTAIN, NOT IMPROVE**
- **NOT ENOUGH AND NHS SERVICES WILL GET WORSE**
- **DON’T KNOW**

However, although there is a view that the NHS is underfunded (79% think it is), half of us think that the NHS often wastes money (50%) and we are more likely to disagree than agree that the NHS is doing everything it can to reduce waste. Deliberative events with The King’s Fund also highlighted a lot of concern – and anger – about waste and inefficiency.
from not being able to re-use crutches, to private finance
initiative (PFI) contracts, to patients having to repeat their
information to multiple healthcare professionals.

So once the extra money is going into the NHS – and not
into other services arguably in just as much need [such as
social care and schools] – the public will want to see results.
The NHS will have to concentrate on making a visible effort
to cut waste, increase efficiency savings – and make A+E
better – which is the public’s top priority for investment.

What it really needs, of course, is to start thinking about
population health, rather than the big white boxes
that the public loves, but that’s another story. ●

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ALMOST HALF (47%) OF UK CONSUMERS STILL AGREE THAT THE GOVERNMENT IS NOT DOING ENOUGH TO ENCOURAGE PEOPLE TO EAT MORE HEALTHILY – THIS IS DESPITE THE INTRODUCTION OF THE SUGAR TAX IN APRIL THIS YEAR.
If you’re on social media, chances are that you’ve seen #metoo in 2018. The phrase ‘Me Too’ had been quietly associated with survivors of sexual violence as early as 2006, as the name of an activist group set up by Tarana Burke. But it gained worldwide attention when actress Alyssa Milano began urging survivors to tweet under the hashtag in the wake of allegations of rape and sexual assault against Harvey Weinstein in late 2017. The hashtag has become well-known, and is regularly referred to by the media. But is it just a moment, or a movement?

Most #metoo mentions (from publicly available social media data) come from the United States – at least 40% – with the UK making up only around 5% of posts. The use of the hashtag is most notable around key events. The initial allegations, the film awards seasons (in particular the Oscars) and, more recently, the US Supreme Court confirmation hearings for Brett Kavanaugh, are where we see big spikes. Looking at the data indexed to the overall population, we see the biggest movements in the US.
It is not especially surprising to see spikes around key times, but what’s interesting is that #metoo seemed to be declining until allegations of sexual assault were made against Brett Kavanaugh, Donald Trump’s candidate for the Supreme Court.

While #metoo did provide something to rally around, discussions about sexual assault and sexual harassment were, of course, already happening on social media, and many were also searching these terms. Typically, this indicates an increased awareness of an issue – and if we look at the top related search terms for sexual harassment, we can see people were either looking to inform themselves or understand better (based on the USA).

**PEOPLE ARE LOOKING TO BETTER UNDERSTAND SEXUAL HARASSMENT**

Top related search terms for sexual harassment

<table>
<thead>
<tr>
<th>RANK</th>
<th>TERM</th>
<th>INDEX*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SEXUAL HARASSMENT DEFINITION</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>HARASSMENT DEFINITION</td>
<td>94</td>
</tr>
<tr>
<td>3</td>
<td>WORKPLACE SEXUAL HARASSMENT</td>
<td>86</td>
</tr>
<tr>
<td>4</td>
<td>WORKPLACE SEXUAL HARASSMENT</td>
<td>82</td>
</tr>
<tr>
<td>5</td>
<td>WHAT IS SEXUAL HARASSMENT</td>
<td>77</td>
</tr>
</tbody>
</table>

*top rated search term is always 100

**#METOO AND OTHER SUCH HASHTAGS DEMONSTRATE THE FUNDAMENTAL ROLE THAT SOCIAL MEDIA CAN PLAY IN CHANGING SOCIETY**
Interestingly, #metoo seems to fuel some search for information or understanding – as well as likely wanting to know who else had been accused.

You might look at the social media and search trends and be inclined to think that #metoo has not stood the test of time. However, what we can see now with certainty is that the average number of searches about sexual harassment is up in the six months following the Oscars, compared with the six months prior to the Weinstein allegations, and that mentions of #metoo in the news media remain high, helping to keep the idea in the public eye.

**THE AVERAGE NUMBER OF SEARCHES ABOUT SEXUAL HARASSMENT IS UP IN THE SIX MONTHS FOLLOWING THE OSCARS, COMPARED WITH THE SIX MONTHS PRIOR TO THE WEINSTEIN ALLEGATIONS**
#metoo: moment? Or movement?

In the first month after the announcement of the Time’s Up Now fund in the US, over a thousand requests were made for legal assistance. By May this figure had more than doubled. There is evidence too of other positive moves, and many suggest that Christine Blasey Ford felt more comfortable and able to step up as a result of the #metoo movement. But likewise, the introduction of #himtoo and what some are calling the hashtag war, could see momentum shift or cause conflict, in the same manner as #blacklivesmatter vs. #alllivesmatter.

The long-term impact of this movement can only be seen with time. However, #metoo and other such hashtags demonstrate the fundamental role that social media can play in changing society, and how people interact not just with their friends and followers, but also how they participate in social change.

THE ORIGINS OF THE HASHTAG

Hashtags were first invented in August 2007 by a Twitter user, Chris Messina, who suggested it could be a good way to meaningfully organise tweets. Hashtags are useful for everything from campaigns to conferences to adding a little sarcasm to your Instagram.

To get in touch with Tara, please email tara.beard-knowland@ipsos.com
HALF OF ALL RESPONDENTS GLOBALLY STILL THINK THAT REPORTS OF SEXUAL HARASSMENT ARE IGNORED
FINANCIAL FRAGMENTATION – DID 2018 MARK THE END OF BANKING AS WE KNOW IT?

BY JOE THRUSH
Research Executive

For years, retail banking has seen a small group of strong incumbents use their scale and power to see off all newcomers. Not especially exciting or innovative, but safe, reliable, and secure. Is that about to change?

I use a good friend of mine as a barometer for how engaged the average person is with an industry or issue, and I once asked him to change banks so we’d both get a £100 switching bonus. He said it felt like a big risk. What if his money got lost somehow? What if the ‘internet pirates’ intercepted his money en route? It seemed like hassle, plus his bank was meeting his needs – keeping his money safe and not charging him to access it.

Our research shows he’s not alone. Banking has not been an industry with strong advocates or glamorous Instagrammable brands, and the ‘big four’ still make up 80% of the retail banking market in the UK.

These two factors are closely linked.
Traditionally, a bank’s greatest asset has been the size of its branch network and customer service infrastructure, and larger banks naturally benefit from these economies of scale, along with the feeling of security consumers have with a well-known brand. Combined with attractive interest rates and providing standard services free of charge, challengers find it hard to differentiate themselves in terms of service or value offered. All combined, this leads to a culture of consumer apathy.

But this narrative may be changing: 61% of UK consumers now check their balance online – 44% on their smartphone. The value of a wide branch network is dwindling in importance, with digital services and infrastructure increasingly seen as the main convenience factors for consumers.

More interestingly still, 26% of consumers now use a financial app or service other than their bank’s, including a third of people of working age [25-64]. This implies the public no longer see financial services as the domain of their bank alone and, more concerningly for established players, the beneficiaries thus far are fintechs and the public are no longer tied to their own bank for financial services.
challenger banks. Eleven per cent now use an ‘online-only bank’ such as Revolut or Monzo. Nine per cent use an app to keep track of their credit score, 4% have an investment app such as MoneyBox or Nutmeg, while a trailblazing 3% use aggregator apps or digital services such as Yolt to view all of their financial information in one place.

While these are small fractions in the wider context, the canary-in-the-coal-mine moment for established players came in August this year, when Monzo broke the symbolic $1bn valuation barrier to obtain ‘unicorn’ status – the first British fintech to do so. The bank reached its 1 millionth customer (2% of UK adults) in September 2018, and claims 15% of all new current accounts opened in 2018 were Monzo accounts.

For established banks however, what’s perhaps more concerning than the raw numbers is that Monzo’s aspirations are so different to the traditional banking model; it plans to become a ‘marketplace’ for financial services provided by other companies. They envisage services ranging from trendy peer-to-peer loans to traditional services such as pensions, insurance and mortgages. Monzo will simply take a cut, and – in theory – integrate the service seamlessly into their customers’ Monzo apps, reducing the effort needed for consumers to shop around.

Within this context, the introduction of Open Banking at the beginning of 2018 adds an extra layer of intrigue. Most notably for the established banks, Open Banking adds a new market niche for money management apps such as Yolt (0.25 million users).
which go a step further than Monzo in offering no primary financial services, but instead act as a dashboard and ‘front-end’ for all interactions between consumers and their financial services – WeChat in China already does this for one billion users. As we’ve argued in previous years, apps like Yolt could, at least in theory, relegate banks to the status of a utility, with a reduced ability to build a relationship with their customers.

Taken together, the rise of the fintechs represents a trend towards financial fragmentation, the upshot of which is a new retail banking marketplace: one with more smaller players and greater consumer choice and convenience. It’s not too late for the established players to react, but they’ll need to be agile and willing to change their ways to stay afloat in this brave new world. ●

To get in touch with Joe, please email joe.thrush@ipsos.com
ONE IN FIVE (19%) UK CONSUMERS REPORT MAKING A CONTACTLESS PAYMENT USING THEIR PHONE IN THE LAST 12 MONTHS
As we’ve been putting together this year’s Almanac, our politicians and civil servants have of course been frantically negotiating the details of the UK’s forthcoming departure from the EU.

But, although Britain may be leaving the European Union, Britain is not leaving Europe. At least, not yet.

So, we thought now might be a good moment to look back at the work we’ve done over the last year and think about what we may have in common with our European neighbours – and what makes us different.

Continued over page ...

To get in touch with Simon, please email simon.atkinson@ipsos.com
Vive la difference!

**MOST POPULAR MEMBER OF THE ROYAL FAMILY**

UK: Prince Harry

FRANCE: Prince William

GERMANY: Prince Harry

ITALY: Prince Harry/The Queen

GLOBAL: Prince Harry/The Queen

**THE ECONOMY IS IN GOOD SHAPE**

UK: 42%

FRANCE: 24%

GERMANY: 80%

ITALY: 20%

GLOBAL: 46%

*Source* Ipsos research in 2018
FOOTBALL FOLLOWERS

- UK: 45%
- France: 44%
- Germany: 49%
- Italy: 55%
- Global: 50%

PLANNING TO HOLIDAY IN OWN COUNTRY

- UK: 26%
- France: 27%
- Germany: 52%
- Italy: 35%
- Global: 57%

VEGETARIAN/VEGAN

- UK: 11%
- France: 8%
- Germany: 7%
- Italy: 5%
- Global: 8%

Base: c.1,000 adults from each country aged 16-65, online, each month
A BRUTAL WORLD: GENDER-BASED VIOLENCE STILL WOMEN’S BIGGEST CONCERN

JESSICA BRUCE
Associate Director

Men are afraid women will laugh at them. Women are afraid men will kill them.”

This Margaret Atwood quote, which featured this year in the hit TV series The Handmaid’s Tale, is, unfortunately, as relevant for the real world as it is in Gilead.

Data from 27 countries shows that gender-based violence is still the most important concern facing women and girls around the world. When asked to identify the top two or three things that worry women in their country, 31% of women mention sexual harassment; followed by sexual violence [29%], physical violence [21%], and domestic abuse [20%]. These issues outrank gendered economic issues like equal pay [20%] and workplace discrimination [16%] by some margin. There was also little variation by economic or cultural context. It is clear that, right around the world, many women do not feel safe and secure – a fundamental human need.
A brutal world: gender-based violence still women’s biggest concern

MANY WOMEN AROUND THE WORLD DO NOT FEEL SAFE AND SECURE

Which two or three, if any of the following, do you think are the most important issues facing women and girls in your country?

Total

<table>
<thead>
<tr>
<th>Issue</th>
<th>North America</th>
<th>LATAM</th>
<th>Europe</th>
<th>APAC</th>
<th>G-8 Countries</th>
<th>BRIC</th>
<th>Middle East/Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sexual Harassment</td>
<td>21%</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
<td>13%</td>
<td>17%</td>
<td>10%</td>
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<tr>
<td>Sexual Violence</td>
<td>20%</td>
<td>25%</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>29%</td>
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<tr>
<td>Physical Violence</td>
<td>20%</td>
<td>23%</td>
<td>22%</td>
<td>21%</td>
<td>22%</td>
<td>12%</td>
<td>25%</td>
</tr>
<tr>
<td>Domestic Abuse</td>
<td>25%</td>
<td>32%</td>
<td>28%</td>
<td>28%</td>
<td>26%</td>
<td>25%</td>
<td>33%</td>
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<tr>
<td>Equal Pay</td>
<td>34%</td>
<td>48%</td>
<td>40%</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source
Ipsos Global Advisor

Base
6,790 women aged 16-65 across 27 countries, online, 26 Jan-9 Feb 2018
In our survey of global gender advocates for Equal Measures 2030 this year, gender-based violence was the top priority identified in order to make progress on gender equality (58%).

But where do you start with tackling a problem so widespread and pernicious as gender inequality and gender-based violence? Data is a key part of the solution (and not just according to those of us for whom data is our job). The saying ‘what gets measured gets done’ is a cliché for a reason. In Britain, the publication of gender pay gap data has already started to move business decision-making.

But globally, data is in short supply. For example, the World Bank’s Gender Data portal shows that in 2016, only Tanzania provided data on the proportion of women subjected to physical and/or sexual violence in the past year. This was down from a whopping five countries in 2015. These gaps themselves are well documented: Data2x, an organisation dedicated to improving the quality, availability and use of gender data in order to bring about change, identifies 28 gaps across five domains (health, education, economic opportunities, political participation and human security). In an age defined by just how much data is available at our finger-tips, on any subject imaginable, it seems bizarre that so little is available on this important topic. But, according to gender equality advocates, this problem is most likely a political one (81%), rather than a technical one (56%).

While hard data from independent sources and government data may be seen as the gold standard, social media can play an important role in providing evidence for advocates and policymakers. That means #metoo activism has a chance at having not just a cultural impact, as my colleague Tara discusses earlier, but a policy one.

To get in touch with Jessica, please email jessica.bruce@ipsos.com
For most brands, summer 2018 created opportunities related to glorious sunshine, but the more observant will also have noticed a proliferation of rainbows. The Pride in London parade had record corporate sponsorship, and lots of brands used the LGBT rainbow in their marketing.

Britvic flew the rainbow flag at its HQ in Hatfield to show employees that they could be out and proud. Royal Mail unveiled a rainbow post-box in London’s Soho and a ‘Delivering with PRIDE’ truck in Belfast. A Paddy Power campaign said ‘Enough of the Nonsense’ and offered to donate £10,000 to LGBTQ+ charities for every goal that Russia scored at the World Cup. The prime-time ad showed the plight of the LGBTQ+ community in Russia, and harnessed both equality and an anti-Russia sentiment in the same advert. The campaign certainly raised a smile with UK audiences (and you’d assume a frown from Putin), and the 11 Russian goals raised £110,000 to help overcome homophobia in football.

Embracing and reflecting diversity in society appeals to consumers in this new polarised society — as politics focuses
Beyond the rainbow

HOW MUCH ARE THESE BRANDS REALLY THERE TO SUPPORT THE LGBTQ+ COMMUNITY, AND HOW MUCH ARE THEY TRYING TO TAP INTO AN INCLUSIVITY TREND IN ORDER TO STAY RELEVANT?

on cultural differences, brands can celebrate shared values, like the 87% who agree gay people should be free to live their live as they wish. But there is also a question of authenticity – how much are these brands really there to support the LGBTQ+ community, and how much are they trying to tap into an inclusivity trend in order to stay relevant?

In a society that broadly thinks it has solved discrimination through allowing same-sex marriage, people are still facing cultural discrimination on a daily basis. When members of the LGBTQ+ community do appear in the media they are often very one-dimensional, stereotypical characters, fitting into such tired tropes as the ‘overly-sexualised gay man’ or ‘gay best friend’ [think Jack from Will and Grace], or psychotic bisexuals [think Villanelle in Killing Eve]. Anyone wishing to live a ‘normal’ life has to constantly remind the rest of society that not everyone is like that. In a world where identity politics is rife, not being heterosexual seems like hard work.

“Adverts are one of the most important ways in which people consume media. The tired stereotype in it [referring to a campaign] is not representative of ... well ... anyone”
James, 26, Gay
This one-dimensional view of particular groups in society has consequences for those on the sharp end. LGBTQ+ people are still frequent victims of hate crime. Pride in London’s research showed that 49% of gay men and 32% of lesbians are reluctant to hold hands with their partner in public, and more than half are afraid to kiss a partner in public (59% of gay men/54% of lesbians). It is, therefore, vital that those of us interested in equality go beyond just raising the rainbow flag during Pride month. McCain Oven Chips arguably went one step further by seamlessly integrating all types of families into the narrative of their 2017 advert. It cleverly places eating chips at the heart of every British family meal, as well seamlessly reflecting a more inclusive, non-binary culture:

“This one-dimensional view of particular groups in society has consequences for those on the sharp end. LGBTQ+ people are still frequent victims of hate crime. Pride in London’s research showed that 49% of gay men and 32% of lesbians are reluctant to hold hands with their partner in public, and more than half are afraid to kiss a partner in public (59% of gay men/54% of lesbians). It is, therefore, vital that those of us interested in equality go beyond just raising the rainbow flag during Pride month. McCain Oven Chips arguably went one step further by seamlessly integrating all types of families into the narrative of their 2017 advert. It cleverly places eating chips at the heart of every British family meal, as well seamlessly reflecting a more inclusive, non-binary culture:

“Acceptance of bisexuality is where acceptance of gay people was in the 80s. We are under assault from culture which tells us we are not real, and if we are real, we’re sluts and we’re confused”

Libby, 38, Bisexual

“When it comes to family, what’s normal? Normal is not normal … There’s Dads, Daddies, two daddies, and long-distance daddies.”

McCain Oven Chips advert, 2017.

The ad for the newest Volvo SUV features a scene familiar to many parents – the anxious drive to the hospital when a baby is on the way. The parents in question happen to be two women, but their sexuality has no bearing on the ad – they are just two people trying to ensure the safe delivery of their precious cargo.
If brands are really going to champion diversity they must put forward LGBTQ+ ambassadors who are champions of normal life, not stale stereotypes portrayed as something strange and ‘other’. As one of our participants said, "Wouldn’t it be nice if we didn’t need a parade? Where not being straight was as boring as not liking eggs. It just didn’t matter, as it was part of who they are.”
ONE IN THREE PEOPLE IN SCOTLAND (34%) LIVE IN HOMES THAT DO NOT MEET THE LIVING HOME STANDARD
In March this year, the Office for Budget Responsibility reported that the Soft Drinks Industry Levy (SDIL) – more popularly known as the ‘sugar tax’ – was set to deliver less than half of the £520m in revenue that was forecast when the policy was first announced. Far from being disappointed, the UK Chancellor of the Exchequer Philip Hammond has said he is “uncharacteristically delighted” at the reduced revenues. With the sugar tax having come into effect in April of this year, is he right to see this result as good news, and what implications might this have for future public health policy?

While restricting people’s personal choices is rarely well-received, the ground was well-set for the sugar tax before it was announced. Eight in ten (81%) of the UK population agreed that individuals and families are not doing enough themselves to eat more healthily, and half (49%) supported the view that the government should make unhealthy foods more expensive. Furthermore, the ‘social norm gap’ in relation to sugar – the difference between what individuals think that others do and what they personally claim to do – was large: almost half
(46%) of the UK population said that they personally ate more than the recommended daily amount of sugar, but estimated that nearly three-quarters (72%) of other people in Britain over-consumed.68

Early indications are that the impact of the sugar tax on the UK public has not been notable. This year, seven out of ten (69%) were aware of its introduction, but two-thirds (63%) claimed not to have reduced the amount of soft drinks that they consume. Moreover, the proportion who claimed to have reduced their consumption (37%) is the same among those who are aware of the introduction of the sugar tax and those who are not.69

However, the reason Philip Hammond was so delighted was not the direct impact of the sugar tax on consumers, but on the industry. According to HMRC, 326 soft drink manufacturers have been affected by the sugar tax,70 prompting widespread reformulation and sugar reductions across product ranges. Some have weathered this better than others: Coca-Cola emphasised the choice in their existing range with their untouched Coca-Cola Classic recipe and their already low sugar Diet Coke and Coke Zero options, but Irn-Bru and Lucozade suffered high profile social media backlashes following their announcements about reducing the sugar content of their leading products.

Ultimately, the nation’s health benefits from these actions. Even if most people do not reduce their consumption of soft drinks,
they will most likely consume less sugar due to industry-led reformulation across the board. In our 2017 paper ‘Sugar: What Next?’ we hypothesised that this type of intervention – one that impacts our health without necessarily limiting our ability to make our own choices – was likely to be most effective.

The door remains open for sugar reduction legislation across other ‘unhealthy’ categories. Public Health England are pushing for sugar reductions across ten food and drink categories, and in their first-year progress update they reported a 2% reduction on both sugar and calories overall. This was met with mixed reactions, with manufacturers keen to point out that progress was being made, but others in the public health arena are more sceptical that voluntary actions by the industry will be sufficient.

The Government don’t yet have the appetite for further sugar (or similar) taxes, but in June stated that they “may also consider further use of the tax system to promote healthy food choices if the voluntary sugar reduction programme does not deliver sufficient progress”. At the same time, they also announced consultation plans to limit the advertisement of unhealthy foods and drinks, and to ban price promotions involving unhealthy foods and drinks in retail and out-of-home sectors.

Given the initial successes of the sugar tax and the continued broad public support for action since its introduction, it is a case of when – not if – we see the next round of legislation.

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‘OLD MEDIA’ FIGHTS BACK

BY KATHERINE JAMESON ARMSTRONG
Research Director
This year the marketing press declared the death of TV, print, and radio, citing the launch of Facebook Watch as the latest nail in the ‘traditional media’ coffin. But, despite new digital platforms’ ability to personalise and target advertising and content, traditional media is alive and well, seeing unprecedented highs in 2018.

This year we have seen TV, print, and radio defend their position and collaborate with those digital platforms they have been pitted against. The recent Sky deals with Spotify and Netflix are prime examples of this, where the customer experience [and cross-platform advertising opportunities] benefit from the provision of these services within a single Sky subscription. Traditional media are in a fantastic position to benefit strongly from these types of partnerships. Whilst traditional media have relationships with audiences built over decades, are associated with quality consumption time and bring reach at scale, digital platforms add the advanced data, targeting, and personalised experiences that traditional media is so often criticised for lacking.

Alongside rumours of its death, TV has also been fighting the myth that younger audiences are no longer interested. However, our recent Ipsos Thinks research ‘Beyond Binary: The Lives and Choices of Generation Z’ tells us that this is not the case. Watching TV on a TV set is still every generation’s favourite way to watch. Whilst Gen Z [those aged 23 and under] are often most associated with short-form content and clips, they are also the most likely generation to get hooked on binge-watching and box sets. Gen Z love media, and spend more time with it than any other generation [two hours per day], spreading that time more evenly across channels than Millennials before them. Though the internet is a primary source of information for young people, as trust in online content falls it is becoming increasingly important for brands to diversify the media they use to communicate. Engaging young people does not require us to abandon traditional media for the next new digital offering, but to layer it with others, to reach them in more holistic, interactive and experiential ways.

This year, in particular, has seen traditional media cement its place as a leading channel. The World Cup provided record breaking TV viewing figures, ITV’s Love Island was the most talked about show this summer, and the acclaimed Bodyguard
saw BBC drama ratings hit heights not seen for the broadcaster for almost a decade (10.4 million viewers). Traditional, mass media still meets a clear human need for shared experiences.

Rather than working against digital platforms, the promotion of TV content is increasingly collaborative. Love Island has been particularly adept at setting itself up to be the ultimate intermedia experience. The content is merely a springboard for the multitude of other ways of keeping the viewers engaged, from posting teaser summary clips on social media, feeding into memes designed for different platforms, through to the highly relevant and targeted brand and merchandise partnerships. The heart of the programmes’ success lies in its strong cultural relevance. Love Island has tapped into key cultural narratives [such as identity and gender representation] whilst allowing its following to interact with the content and debates that resonated with them using their preferred channel.

Whilst the future is undoubtedly digital, this is not at the expense of traditional media, but very much in collaboration and partnership with it. With all this evidence of success, a focus on culture, and a greater willingness to adopt the strengths of their competitors, traditional media is showing its relevance not just now, but for many years to come.

To get in touch with Katherine, please email katherine.j.armstrong@ipsos.com
As 25 May 2018 approached, many of us may have felt that GDPR had been sent to test our patience and fill our inboxes. Many working in Big Data and tech, however, saw the onset of GDPR as an important step in restoring trust in a sector that badly needed it. The thinking was that the more transparency that could be offered to the public on how their data was being used, the more they might trust the companies using that data. Now that some time has passed since GDPR launched, it is a good opportunity to take stock of the situation.

Firstly, awareness of GDPR is high. Our research conducted in October 2018, not quite seven months after GDPR launched, shows that 83% of the British public have heard of it. This will be of no great surprise given the media furore, seemingly endless emails, website redesigns and the changes most workplaces have gone through. More positive, however, is that it seems that the public are also aware of some the core principles behind GDPR – clear majorities agree that they understand they have the right to see what data a company holds on them and can
Can GDPR restore our trust in business?

request its deletion should they so desire. Fewer [although nearly half of the public] understand that their data is being encrypted.

Positively, two fifths of the public say that, because of GDPR, they are more confident that the companies who hold their data will keep it safe, and over half agree that they are now better able to control how their personal data is collected and used. While we all know that self-reported awareness is one thing, and actual behaviour change is another, a positive picture is being formed here of a UK population much better aware of their own digital rights, and what expectations they should have on what companies and organisations should be doing with their data.

GDPR HAS MADE US MORE AWARE OF OUR DIGITAL RIGHTS
To what extent do you agree or disagree with the following statements?

As a result of GDPR I am more confident that my personal data is safe with companies and organisations who hold it

<table>
<thead>
<tr>
<th>STRONGLY AGREE</th>
<th>NEITHER AGREE</th>
<th>TEND TO DISAGREE</th>
<th>NO OPINION</th>
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<tbody>
<tr>
<td>12%</td>
<td>31%</td>
<td>30%</td>
<td>16%</td>
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As a result of GDPR, I am better able to control how much of my personal data is collected and used by companies or organisations

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<th>STRONGLY AGREE</th>
<th>NEITHER AGREE</th>
<th>TEND TO DISAGREE</th>
<th>NO OPINION</th>
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<tr>
<td>16%</td>
<td>38%</td>
<td>27%</td>
<td>10%</td>
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I understand that my data is encrypted

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<tr>
<th>STRONGLY AGREE</th>
<th>NEITHER AGREE</th>
<th>TEND TO DISAGREE</th>
<th>NO OPINION</th>
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<tr>
<td>15%</td>
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<td>32%</td>
<td>9%</td>
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I understand that I have the right to see all data a company or organisation holds on me

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<th>STRONGLY AGREE</th>
<th>NEITHER AGREE</th>
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I understand that I have the right to request that all data held on me is deleted

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<th>STRONGLY AGREE</th>
<th>NEITHER AGREE</th>
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<th>NO OPINION</th>
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<tr>
<td>27%</td>
<td>42%</td>
<td>19%</td>
<td>5%</td>
</tr>
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</table>

Source
Ipsos MORI Sustainable Business Monitor
Base
834 GB adults aged 18-65, who had heard of GDPR, online, 4-25 Oct 2018
The problem is that, while individuals may know more about their own rights, trust in both the public and private sector on data protection and privacy is still low, and really emphasises the scale of the problem that those optimists thought GDPR might start to fix. Only the NHS and the banking sector are constantly more trusted than distrusted when it comes to the finer details of collecting, using and protecting personal information. Even the NHS, that widely loved institution we implicitly trust with our lives, is not trusted on data issues by more than half of the British public. (Perhaps because in 2017 we saw massive coverage of the NHS computer system hack closing surgeries.) This is an alarming finding for anyone hoping GDPR is going to fix how the tech sector, for instance, is seen.

For other sectors the picture is far from positive – and this cannot be much of a surprise to anyone. The optimists will point to the fact that large portions of the public, up to half in some cases, are neutral or unable to answer the questions, and that levels of actual distrust are low. On the flip side, however, no more than a third express trust in the tech sector, the supermarkets, their local council or the government to be transparent about data use, seek consent on data collection or manage data in the interests of the user.

What does this mean? The obvious answer, and one that was predictable, is that GDPR has failed to make as much of an impact on how much the public trust the organisations and industry sectors that use our data most frequently and on the largest scale.
Can GDPR restore our trust in business?

TRUST LEVELS ARE LOW FOR MANY SECTORS
How trustworthy or untrustworthy would you say are the following organisations when it comes to...?

Seeking your consent when it comes to data collection

Being transparent about how they use your data

Protecting your personal data

Encrypting your data
scale. What GDPR may have done however, and the evidence will start to accrue more over the coming months and years, is to educate the public about their legal rights over their own data, and provide a greater understanding of how data should be collected, used and stored. Any company or organisation that fails to meet these changing circumstances will find themselves in trouble, but those that realise it and act soon will find that doing so will do more for their trust scores, and their businesses more widely, than simply following regulation could ever have done.

Managing my data in my best interests

Source
Ipsos MORI Sustainable Business Monitor

Base
834 GB adults aged 18-65, who have heard of GDPR, online 4-25 Oct 2018

To get in touch with Carl, please email carl.phillips@ipsos.com
BOYS DON’T CRY –
MASCULINITY AND HIV
IN SOUTH AFRICA

Does carrying your baby in a sling make you less of a man? Piers Morgan seems to think so, as he tweeted a picture of James Bond actor Daniel Craig carrying his newborn son in a sling with the accompanying comment “#emasculatedBond”.

Comments such as this have meant that discussions of what masculinity is and means have rarely been far from the spotlight this year.

Much of the popular and media discourse is focused on the impact of male behaviour on women [and rightly so]. But one angle that is slowly coming to the fore is the impact of social constructions of masculinity on the health of men, in particular the idea that men have a hard time facing their own vulnerability and seeking help.

In the west at least, this is generally seen as a tragedy for the individual man, whose life is shortened or adversely affected by this unwillingness to seek help. But what if cultural norms around masculinity weren’t just condemning individual men to a life of infirmity, but were fuelling an entire epidemic of a virulent [but preventable and treatable] disease?
Our recent work with the Bill & Melinda Gates Foundation and Population Services International (a multinational NGO) sought to understand what is stopping young men in South Africa from getting tested for HIV, and accepting treatment if they do test positive.

We uncovered many of the barriers you might expect in a sub-Saharan African country with challenges in resourcing its health system: long waiting times, lack of resources in clinics, a sometimes frightening disregard for confidentiality, and distrust in the ability of the healthcare system to deliver basic services. But we were less prepared for the major role traditional masculine behaviours were playing in putting men at risk of HIV and inhibiting them from taking charge of their health. This also goes beyond the health of the individual man, as he is likely to be infecting his partners with the virus. The dictates of traditional masculinity are therefore transformed from an individual issue into an epidemiological faultline.

In many ways, the unhappy marriage of HIV and South African norms around masculinity creates a perfect storm for HIV to flourish. Just being a man in a poor community in South Africa exacerbates HIV risk. Men are expected to be strong providers, community role models, financially successful and to live according to the strict norms of traditional behaviour. With income disparity and unemployment at record highs, this is a pipe dream for all but the most affluent. So many men fall back on coping mechanisms: sex, drugs, alcohol, multiple partners and a cavalier lack of regard for their own wellbeing, all of which facilitates the easy spread of HIV.

Even worse, society tolerates, and even expects, that men will live this way. A real man is supposed to be virile and have many concurrent partners. Condoms can be seen at best as an annoyance, or at worst a western plot to reduce the African birth rate. In some communities, rape and violence towards women, while not exactly socially sanctioned, are seen as an ingrained fact of life. As the backdrop to all this, many men and women alike have access to cheap alcohol, which lubricates social interactions, greases the wheels of relationships and lowers inhibitions.
Put all this into a clinical environment and you have a recipe for disaster. We observed men being asked to wait for hours in crowded waiting rooms, among babies and children. When they did finally get to see a nurse, she (and it almost always is a she) often delivered a pre-rehearsed lecture about the dangers of drinking and having too much sex. Men we interviewed told us about how hearing all the ways in which they must change their life was demoralising and depressing; hearing it from a woman was even worse. These men were expected to remain strong and emotionless throughout this encounter, even if inside they felt terrified and lost. Most of all, men felt that they had no control over their HIV test.

So how can we add a sense of control back into a disorienting experience like this? Earlier this year, the British politician Tom Watson wrote in the Guardian about his approach to weight loss. A diagnosis of type 2 diabetes left him frightened, ashamed and contemplating his own mortality, so he immersed himself in the scientific literature around healthy eating and exercise, thereby taking back control of his health and weight loss on his own terms. Our research suggests something similar could be tried for men in South Africa. Instead of forcing men through a system that isn’t designed for them, we should respond to their basic human needs. If men feel out of control, then allow them to choose their own appointment times. If they feel hectored by nurses, train the nurses to take a more empathetic approach. If they feel that HIV testing represents nothing but loss, give them a good reason to find out their status.

Above all, it’s time to end the narrative that men should ‘man up’ and get on with it. If we do not begin to tackle the damage to men’s health caused by traditional notions of masculinity, suicide rates will continue to rise, alcohol-related deaths among men will continue, and the HIV epidemic will continue to roll on.●
Chancellor Philip Hammond’s October announcement that “the era of austerity is finally coming to an end” was met with mixed emotions from public servants, charities, industry leaders, policy makers and the general public alike. From approval, to relief, to downright scepticism – the Autumn Budget has split opinion.

Regardless of what you think of the announcement, the public are ready for the soundbite of the ‘end of austerity’. Our ‘State of the State’ work with Deloitte highlights support for increased public spending – 62% agree that the government should be extending services even if this means some tax increases, up from less than half (46%) in 2009. Those personally willing to accept less from public services, in order to pay off the national debt, have plummeted from 47% in 2010, to just 15% in 2018.

Similarly, 70% are now worried that the government and public services won’t do enough to help people in the future, up from 50% in 2010. Cuts have been shown to have disproportionately affected those who had the least to start with, such as those dependent on benefits, people with disabilities and lone
parents. This has created knock-on effects for poverty levels, – with child poverty rates at a 15-year high and poverty rates among pensioners creeping up from 13% in 2011 to 16% by 2017.

Public services themselves are more audibly crying out for more. Chief Constable Sara Thompson recently spoke out about how reduced policing resources has left them struggling to deliver ‘core policing’ and unable to address the spike of reported hate crimes. Public concern over police spending has increased since 2017. As ever, the NHS remains the most pressing concern among the public, with eight in ten naming it as the main area which should be protected from the cuts.

This all sits in the context of growing dissatisfaction with the way public services treat their users. Only 16% feel that organisations delivering public services understand their needs, down from 24% in 2014, and 9% agree that their preferences are listened to, compared to 16% in 2014.

**INCREASING SUPPORT FOR EXTENDING GOVERNMENT SERVICES, EVEN IF THIS MEANS PAYING MORE TAX**

People have different views about whether it’s more important to reduce taxes or keep up government spending. How about you? Which of these statements comes closest to your own view?

![Graph showing increasing support for extending government services, even if this means paying more tax.](chart)

**Source**
Survey on behalf of Deloitte LLP for ‘The State of the State 2018’

**Base**
1,463 UK adults, 18-28 August 2018
So, what does the future hold? Hammond’s Budget, on the surface, does seem to support an end to austerity in some services, like the NHS, but still means real cuts of 2.9% over the next few years in non-protected services. Polling suggests it was relatively well received: there was something for everyone, increased personal allowances and higher tax rate thresholds, £1.7 billion going towards Universal Credit, stamp duty abolished for first time buyers, a new £30 billion fund for roads and to address the national ultimate bugbear – potholes. Importantly, there was also the promise of an additional £20 billion ear-marked for the NHS.

However, the small matter of Brexit remains. While Hammond included a £500m no-deal Brexit fund, he went on to disclose that, in a no-deal scenario, the budget would be in need of revision, meaning much will hang in the balance until 29 March 2019, and likely beyond.

Even allowing for a smooth Brexit deal, with minimum impact on public finances, IFS analysis suggests that more money is still needed to end austerity in real terms. The current cash injection only 15% are personally willing to accept less from public services.

I am personally happy to accept less from public services than I currently get in order to pay off the very high national debt we now have ...

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Source: Survey on behalf of Deloitte LLP for ‘The State of the State 2018’ Base: Half sample 748 UK adults 15+. 18-28 August 2018
The end of austerity – a tide of change on public spending?

**PEOPLE ARE MUCH LESS POSITIVE ABOUT MANY ASPECTS OF PUBLIC SERVICE DELIVERY**

How often, if at all, do you think organisations that deliver public services ...

1. **... understand your needs**
   - AUG 2018: 16%
   - JUL 2016: 23%
   - FEB 2014: 24%

2. **... work with other public services to give you something they couldn’t do on their own**
   - AUG 2018: 17%
   - JUL 2016: 19%
   - FEB 2014: 21%

3. **... listen to your preferences**
   - AUG 2018: 9%
   - JUL 2016: 19%
   - FEB 2014: 16%

4. **... offer you personalised services**
   - AUG 2018: 9%
   - JUL 2016: 17%
   - FEB 2014: 16%

5. **... involve you in decisions about how you use the service**
   - AUG 2018: 8%
   - JUL 2016: 16%
   - FEB 2014: 14%

Our polling indicates that public opinion on public spending is thermostatic. As government spending increases, concern tends to decrease. Given the...
uncertainty of Brexit, and question marks over the Budget on real-term increases for services, it will be interesting to see how the impact of ‘the end of austerity’ unfolds and how this is reflected in public opinion. Will it help shore up Conservative support from swing voters in a snap election? How many more unintended consequences will become more visible over the next four years – and will that mean the size of state spending starts to rise regularly? ●

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THEY WIELD INCREDIBLE POLITICAL POWER. IF YOU LOOK AT ALL OF THE SEISMIC POLITICAL EVENTS OF THE PAST FEW YEARS YOU’LL FIND THAT, IN PART, IT WAS OLDER VOTERS WHO DROVE THEM
We’re all getting older. And not just as individuals – we live in an ageing society. The median age of country populations all round the world is rising, due to declining fertility rates and rising life expectancy. Latin America is even experiencing a dramatic, double-digit change; between 2010 and 2050 Brazil’s median age is set to rise by 15 years from 29 to 44. This rise in the median age is being driven by growing numbers of those aged over 65; by 2050, Iran’s share of those aged 65 and above is set to quadruple (from 5.2% to 21.5%), and triple in South Korea (from 11.1% to 34.9%) and China (8.3% to 23.9%).

Despite these huge demographic changes, our understanding about what later life is like is woefully out of date; it is portrayed as a “narrative of decline” – not a time of opportunity and change. Actually those in later life are some of the happiest in society; old age really is our golden years. Office for National Statistics data on personal wellbeing shows that, from the age of 65 until at least our mid-70s, levels of personal wellbeing look very positive. People in this age bracket rate more highly the things they do as worthwhile, and report higher happiness scores.
They also wield incredible political power too. If you look at all the seismic political events of the past few years you’ll find that, in part, it was older voters who drove them. Some commentators now suggest we live in a gerontocracy. In the UK, Prime Minister Theresa May is a relatively spritely 62-year-old, while the leader of the Labour Party, Jeremy Corbyn, is 69 and Liberal Democrat Leader Vince Cable is 75. In the US, this pattern is even more pronounced: ahead of the November mid-terms, 23 Senators were at least 70 and seven were over 80. The average age of the US Senate came into sharp relief in April of this year, when Mark Zuckerberg of Facebook was called to face questions on Capitol Hill and ended up having to explain some social media basics to the Senators. In boardrooms too, it’s older people who are dominating. The global average age of CEOs is 55 – and the most frequent age is 58.

Despite controlling the boardrooms, older consumers are regularly ignored by advertisers. Four in five of those working in advertising, media and PR agree that the advertising industry comes across as ageist, and half of those aged over 45 believe advertising is bad at showing people they can personally relate to. While there have been a few notable exceptions (Isabella Rossellini as the face of Lancome again aged 63 after being fired at 43 for being too old, Joan Didion modelling for Celine, Helen Mirren fronting L’Oreal), products are typically designed for and marketed to the young. Older people are also ignored by retail. Around four in five (82%) of those aged over 55 say their favourite retail brand no longer understands them or what they need.

This may prove to be a big mistake for brands. Older consumers have money to spend and they’re smart about spending it. In the UK, spending on going out to hotels and restaurants or other leisure activities is greater than elsewhere, while the French spend more on other goods and services such as beauty care, welfare,
insurance and other personal effects.\textsuperscript{89} In fact, in the UK at least, the over-50s now account for about 47% of all UK consumer spending [up from 41% in 2003], worth £320 billion a year.\textsuperscript{90} Their loyalty is also fragile; nearly all (95%) said they would consider “cheating” on their favourite retailer with a competitor, so they could easily be swept away by a new brand who sought to understand their needs better.

Tech companies also need to take note. Older people [US Senators aside] are also more connected than we give them credit for. Looking at data from our Global Trends Survey\textsuperscript{91} we find that on a variety of measures older people are more likely to be techno-optimists, and less likely to agree that technological progress might destroy our lives [53% of those aged 16-24 agree with this compared to 44% of those aged 60-64].

Yet in spite of all this, those in later life are largely airbrushed out of popular culture. Television portrays only 1.5 per cent of its characters as elderly, and most of them in minor roles.\textsuperscript{92} The situation is little better in film; women are given less dialogue in Hollywood films the older they get.\textsuperscript{93} When they do appear on screen, older characters tend to highly stereotyped – grumpy, forgetful or constantly falling asleep,\textsuperscript{94} or fulfilling traditional gender roles.\textsuperscript{95}

The advance in life expectancy is, surely, one of our greatest achievements. But without understanding or thought for the reality of later life, we do those in it a great disservice and miss out on potential opportunities for improving all our lives.

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ARE YOU THERE?
The biggest voices of 2018 were Alexa, Siri, Cortana and Google Assistant, as they rapidly made their way into millions of homes. This was the year of voice technology, with new devices, updated software and additional skills inspiring both fears and hopes for a future less dominated by screens and text.

More than 60% of British smartphone users use a voice assistant at least once a month,96 and now 10% of UK households own at least one smart speaker device.97 As a result, four out of five (79%) of media agency executives and advertisers believe it is important to reach audiences through voice activated devices.98

However, recent social media scandals and some bad publicity have increased audiences’ concerns about privacy and being overheard by their device. How can consumers know when their device is listening and with whom it is sharing their conversations?

In this uncertain landscape in 2018, we collaborated with the IAB [Internet Advertising Bureau] to understand the impact of voice technology beyond the hype. Using semiotics, projective
techniques and discussion groups we tried to get under the skin of consumers to understand what they really want from their smart speakers, to help brands take advantage of the opportunities of voice technologies, whilst minimising the risks.

Our most interesting insights came when we asked early adopters to create collages of possible utopian and dystopian futures of voice technology. This revealed some unexpected positions on privacy issues. Despite the fear of being spied on, consumers’ attitudes drastically change depending on the perceived benefit to them. They are happy to share some of their most private information with brands, as long as they believe they are getting something worthwhile in exchange – such as messages and services that are of high impact or interest to them. The relevancy of the interaction is key to overcoming privacy barriers and avoiding being more noise in the user’s life. Providing they receive relevant reassurances, our users want to trust their voice assistant with a large amount of personal data, if they receive a personalised service that intuitively caters to their needs.

With this in mind, we began mapping out the ideal relationship a user could have with their voice assistant. It appears that the perfect voice assistant would play the part of the virtual butler – the Alfred to our Batman. This virtual butler would satisfy several needs and roles such as:

- Family doctor: knowing our physical and emotional needs
- Parent: knowing our tastes, needs, and behaviours
- Best friend: having a personality and knowing our deepest secrets while maintaining confidentiality [virtual and digital companions are already particularly popular in Japan]
- Partner: teaming up with us to educate our children
- PA: helping with organisation and filtering content that is relevant and important to us
- Pet dog: loyally following commands and never protesting about its role
All of these things are hard – after installing a ‘skill’ on your device, for example, there’s only a 3% chance someone will use it again, according to VoiceLabs.

What does it mean for brands?

In order to successfully operate in voice technology, brands need to consider how they fit within the consumer’s desire for a virtual butler. Focusing on the customer journey, brands could better understand pain points and identify opportunities for voice technology that fit within the consumer’s life and benefit their needs.

To help brands work out how to use Amazon Echo, Google Home and so on, we identified six areas to experiment with:

1. Deal with privacy concerns: While the British are among the least concerned about online privacy, 32% are worried about Google or Amazon storing their private conversations – and users of these devices are just as worried as non-users. Adoption will move faster as privacy concerns are dealt with.

2. Voice apps: Specific voice assistant applications that exclusively work on one of the voice operating systems, such as Alexa Skills.

3. Ads: Paid for messages and content targeted at people, e.g. digital audio ads, or content linked to voice activity.
The future of voice technology

CONSUMERS ARE HAPPY TO SHARE SOME OF THEIR MOST PRIVATE INFORMATION WITH BRANDS, AS LONG AS THEY BELIEVE THEY ARE GETTING SOMETHING WORTHWHILE IN EXCHANGE

4. SEO: Optimising your digital presence for voice search, e.g. voice search engine optimisation, so ‘Alexa’ can find your website

5. Products/digital services: Creating new, or augmenting your existing products or services with voice tech e.g. your website or chatbots

6. Brand partnerships: Partnering with existing voice tech providers or services, e.g. sponsorship

The evolution of voice technology depends on many different factors, but in a voice enabled future brands must be seen to complement the users’ needs, rather than disrupt their experience with irrelevant content.

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63% OF PEOPLE THINK THEY CAN SPOT FAKE NEWS – BUT ONLY 41% THINK THE AVERAGE PERSON CAN
It seems every year, as we review the state of public services in this Almanac, we comment on the social care crisis. Nothing this year has made us change our analysis – and the public remain confused over what to expect and who is responsible.

In 2018, 40% of us said the NHS, hospitals and healthcare were among the important issues facing Britain today, compared with 10% for the ageing population and social care. Yet there is a great deal to be worried about for social care. There is insufficient funding and a lack of awareness of how the system works, which means that we are ill-prepared to access or pay for the care we need. Only 26% of Britons reported having started saving for social care, and just 37% had considered the cost of dementia care and support.

Half of the British public think social care is free at the point of need, like the NHS [it isn’t]. Our qualitative research confirms that there is confusion about the current system and who is responsible for paying for care. There is also evidence of widespread unmet
need for care; our analysis shows that over 50% of older people with care needs do not receive help for all their needs.\textsuperscript{104}

This lack of knowledge about social care leads to outcries like that around Theresa May’s ‘dementia tax’. The good news is that a widespread political consensus has been emerging about the need for urgent action, though there remains a lack of clarity on what that should be. The public agree there is a need for action: 82% say they would support increased funding for social care,\textsuperscript{105} although only half think this should be paid for through a tax increase or additional tax.\textsuperscript{106}

In recent qualitative research on social care funding with the Health Foundation and King’s Fund, we spent two days with people explaining social care. Once participants were aware of how the current system works and had time for reflection and discussion, they agreed the present situation was not sustainable. They were realistic about what is achievable and concerned about fairness for different generations and the protection of housing assets.\textsuperscript{107} They often raised a dedicated
social care tax spontaneously – people would be willing to pay higher tax if they knew what it would be spent on, and that it would make a difference to the care they receive. While policy makers and economists have concerns about this approach, there is an increasing appetite to discuss this option.108

AROUND HALF WOULD BE IN FAVOUR OF ADDITIONAL TAXATION TO INCREASE SOCIAL CARE FUNDING
If the government decided to increase spending on social care, how do you think this should be funded?

An increase in income tax

An additional tax that is earmarked specifically for social care

An increase in National Insurance

Spending cuts to other services outside of social care

An increase in Inheritance Tax

An increase in VAT

Increased government borrowing

Some other way

Source
Ipsos MORI / The Health Foundation 2018

Base
2,083 adults 15+ in the UK, 11 – 29 May 2018

51% support additional tax or tax increases of some sort

24%

16%

15%

13%

9%

7%

5%

26%

9%
Politically, can a government prioritise social care funding over NHS funding when social care is so poorly understood? It doesn't look like it – the NHS is being given more funding while the Social Care Green Paper remains mired in government. A national conversation about social care is needed. Until people become as aware of social care as they are of the NHS, it will remain the NHS’ poor relation, unless finally, perhaps after our lifetimes, it is integrated with the NHS. ●

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75% of Leave supporters think that European immigration has increased crime levels when evidence from the Migration Advisory Committee report finds no link.
There is nothing that makes a researcher’s eye twitch quite like a bold claim made without evidence. Conversely, there is a certain kind of joy that comes from busting spurious claims and myths. As it’s nearly Christmas, I’m going to indulge myself and bust some myths about the so-called crisis in British retail.

**MYTH 1: RETAIL IS IN CRISIS AND STORES ARE DYING**

Every day there is another bad news story for retailers – slowing sales growth, store closures, lost jobs. But it’s time to dispense with the idea that retail, and physical retail specifically, is in crisis.

- Value sales were up 5.5% in the three months to September 2018
- Rolling three-month numbers show consistent long-term growth since 2013
- Stores contribute more to retail growth than online because we still buy way more stuff in stores than online (17.1% is bought online).110

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BY JAMES LLEWELLYN
UK Head of Shopper Research

THE DEATH OF THE HIGH STREET IS A BIT PREMATURE

Ipsos MORI Almanac 2018
The death of the high street is a bit premature

Many retailers are struggling. Grocers trading blows with discounters, high streets generating more tumbleweed than sales, department store shut downs, and so on. The problem isn’t the business model, it’s that better retailers are taking share away from worse ones. At times it feels like online retail is being portrayed as a pantomime baddy. Unlike the kids in the audience, many retailers have been unable to detect something creeping up behind them. Online retail isn’t the baddy, but has raised the bar, like Craig from Strictly.

Whereas shoppers used to travel to retail, retail now comes to them. Barriers to entry are collapsed; people now have more choice. Recently I was instructed by my wife to reseal the bath tiles. Within seconds I ensured that I paid a fair price for the product, with no extra to pay for delivery. The sealant arrived later that day, without needing to move, never mind leave the house. The sealant and sealant gun are still sitting in their boxes, but that’s not the point.

Let’s look to some Ipsos global data to evidence the general application of my DIY story. We asked 500 people in the UK why they shopped online, the top three answers are:

We shop online because it’s easier, we save time and we feel we are paying a fair price. Sounds a lot like why we choose to shop in one place or another for everything. When I buy stuff from

I got a better price/deal online 52%
It was more convenient for me 48%
The shipping was low cost/free 19%

Hotel Chocolat at Marylebone [likely to say “sorry” for some task not completed at home] I don’t buy it there because of the experience of shopping in a store. I buy it there because the retailer appears at the right time in the right place. Retail is healthy: Amazon isn’t the problem – failing to deliver to shopper needs is the problem.
MYTH 2: STORES, AND RETAIL IN GENERAL, NEED TO BE MORE EXPERIENTIAL

One of the strangest arguments I’ve heard is that to thrive stores need to be places where people have great experiences, because you can’t have a great experience online, because online is just transactional. People take the experience argument too far and get struck by bouncy castle syndrome.

Bouncy castle syndrome is where, to solve the problem that e-commerce is often the best route for consumers to get what they want, you need to add something else to your store, something impossible to replicate online.

Some examples:

- Declining footfall in your shopping centre? Add a celebrity book signing at the big chain bookshop.
- Fewer people coming to your hypermarket? Buy a chain burger café.
- Feeling the need to attract more people to your department store? Add a crèche to get the kids out of the way.
- Want to bring more people into your garden centre during winter? Install a grotto and rent a Santa.
The issue with these examples is that, while they add something, they don’t present the physical store visit as a better alternative to buying the product online. “Let’s go to the Eden shopping centre in High Wycombe today: they’ve got a bouncy castle!” said no one, ever.

**MYTH 3: DEPARTMENT STORES ARE NEARING EXTINCTION**

Many department stores are doing badly: the sale of House of Fraser, as well as Debenhams and M&S store closures. Many are doing well: Harrods’ sales are up to £2.1 billion, Selfridges has record sales, and Fortnum & Mason has experienced sales growth of 10.6%.

Is this the ‘squeezed middle’, the idea that mid-priced retailers are suffering due to a polarisation of society? No, not being distinctive and positively associated with shoppers’ needs is the issue. House of Fraser, Debenhams and M&S (the non-food part) are no longer strongly enough associated with the needs relevant to their range. Some examples:

- New outfit for wedding
- Present for kid’s birthday party
- Coffee break while out shopping
Just considering these three alone it’s reasonable to argue that there are lots of other retailers with stronger associations and/or relevance.

I didn’t comment on John Lewis because I think their proposition (excellent digital presence, price matching, engaged store staff) will see them continuing to be held up as an example of visionary retail. Their profits fell because they matched competitor discounts, which will help them retain those shoppers in the long term.

**BUT WHAT DO DEPARTMENT STORES, AND ALL RETAILERS, NEED TO DO?**

Despite the breezy tone of this article, succeeding in retail is hard, it has always been tough, and is now more difficult than ever. The necessary condition of success is the same as it always was: be distinctive rather than me-too and attach your brand to the needs you are targeting. This applies whether you’re selling via store, online, catalogue, pop-up, social commerce or Morse code.

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“I’m a nationalist – America first.” A promise from Bolsonaro to “make Brazil great”. Liam Fox’s insistence that the UK be a “rule-maker, not a rule-taker”. Newspapers are full of politicians stressing national interests, and the world is increasingly presented to us as an unfriendly place. But does the general public in these nations respond in kind, and dislike each other more these days? Do geopolitical spats resonate with popular moods of indignation or indifference towards other nations?

Our study on global perceptions of other nations, and tourism statistics suggest the opposite: the global public does not want to live locked in their physical and cultural borders, and negativity does not rule the day in our opinions on other nations. More and more we appreciate and are curious towards other cultures and people. This is, in turn, fuelling more international travel than ever before – 1.3 billion outbound tourists recorded annually, projected to grow to 1.8 billion by 2030.112

If money was no object, the majority globally (58%) would travel internationally. This figure stood at 56% two years ago, so Brexit
and Trump have had little effect. Desires to visit a country transcend tariff wars, sanctions and poor rapport among nations’ leaders: 68% of Chinese, 67% of Russians and 59% of Germans still want to visit the US. Historical animosities are not an unsurmountable barrier to a destination choice either: 62% of Turks want to visit Greece and 72% of Argentinians desire to travel to the UK; 54% of Poles and 83% of Russians want to visit Germany.

We are also happy to buy products from around the world. While President Trump may have fired the opening salvo in a potential trade war, these tensions have not made Americans feel more negative about purchasing products made in China (in fact, Americans have become more positive towards ‘made in China’ in the past year). Americans are particularly impressed by China’s technology and science, ranking the Chinese third in the world in these areas. In turn, the Chinese continued to rank the US highly in terms of exports (2nd), culture (4th), and immigration and investment (4th).

While events with high international visibility do have an impact, interest in tourism can revive as dramatic events fade in memory. In 2014, with the crisis in Ukraine at its peak and Russia blamed for its role in the conflict, Russia’s appeal as a tourist destination suffered. Yet the nation’s appeal had bounced back by 2018. We observed similar bounce-back patterns in Egypt after the Arab Spring, in Greece following the financial crisis, and in Turkey after the coup attempt. Perhaps most noteworthy is the British case. The global reputation overall, and cultural and tourist appeal of the UK proved to be resilient to the negative coverage around Brexit. The UK scores dipped the year of the Brexit vote, but the nation’s reputation has now been restored, and in 2018 the UK was ranked the third most appealing country to travel to in the world by the global public.
In the long run, the public’s desire to travel to countries and experience their culture is remarkably resistant to effects of disturbing events, media campaigns around them, and adversarial rhetoric coming from political leaders and their advisors. The power of Instagram and TripAdvisor ultimately prevails over the hot air of global politicians.

WHAT IS NBI?

The Anholt Nation Brands Index (NBI), powered by Ipsos, measures the appeal of each country’s “brand image” by examining six dimensions of national competence: Exports, Governance, Culture, People, Tourism, and Immigration/Investment. NBI is offered to governments and their agencies as a resource to understand how the world perceives their nations as attractive destinations for trade, investment and tourism. NBI shows how their image and reputation differ from other nations; we advise on what is misunderstood, exaggerated, or not known at all about them on the global scene. NBI’s measurement instrument is a global tracking survey, conducted annually since 2008, with more than 200,000 completed interviews with adults in its database for benchmarking and tracking nations’ reputations.

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It’s been another turbulent year for Theresa May, and there is no sign of the weather settling just yet. The final months of 2018 alone have witnessed endless negotiations, not just with the European Union but also with her own party, and rumours swirl on when she’ll be replaced as the Conservative Party leader. Meanwhile Brexit has now become the top issue of concern amongst the British public. And as we go to press, the reaction to the Prime Minister’s draft Withdrawal Agreement has raised the political barometer to even stormier levels.

As the saga continues, our data shows the public have become progressively more doubtful over the year of Theresa May’s ability to successfully carry out Britain’s withdrawal from the European Union in March 2019. Confidence in the Prime Minister to get a good deal for Britain has plummeted since last year –78% say they lack confidence she’ll get a good deal. Half the public (49%) think the negotiations have gone worse than they expected. Theresa May’s first attempt at compromise within her party was met with little approval from the British public.
Brexit – in the eye of the storm

– just 29% thought the Chequers plan would be a good thing for Britain116 and only 8% rated her is stronger than other European leaders at achieving her objectives from the negotiations.117 In fact, just before the Withdrawal Agreement was announced, more people believed that Britain would leave in March with no deal in place than believed a deal would be struck (44% vs 29%).118

The saving of Theresa May [if she survives] will be because, ultimately, the public don’t believe anyone else could do better. Theresa May is trusted to make the right decisions on Brexit (41%) more than Jeremy Corbyn (31%), and only a third trusted Boris Johnson (35%), Phillip Hammond (33%), or Jacob Rees-Mogg

CONFIDENCE IN MAY TO GET A GOOD DEAL FOR BREXIT DROPS
Please tell me how confident, if at all, you are that Theresa May will get a good deal for Britain in negotiations with other European Union leaders

[29%].119 Although the public may not think Theresa May is doing a good job, there’s no sign they think anybody else could do better.

The Prime Minister can take some comfort, however, that the public don’t rate the EU highly either – slightly more believe the EU is doing a bad job at the negotiations,
THREE IN TEN (31%) EXPECT TO SEE THEIR OWN STANDARD OF LIVING DECREASE IN THE NEXT FIVE YEARS AS A RESULT OF LEAVING THE EU
sign that the public think anyone else would do much better, and perhaps most importantly little consensus on the way forward. Of course, these are just first reactions, and could change – especially while politicians themselves can’t agree on the deal either. Which all means the tail end of 2018, and the first few months of 2019 could prove to be just as pivotal as the referendum itself.

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52% OF BRITONS
ENJOY FLYING
(21% DO NOT)
For many years between the late-1990s and Brexit, immigration was seen by the public as one of the most important issues facing Britain. It was one of the biggest drivers of the Brexit vote, and our international research showed that Britons were more worried about immigration than in many other countries. However, since 2015, and after the Brexit vote, public concern has declined and views have remained relatively stable since. This trend has continued this year – our Issues Index shows that only around one in five now see immigration as the key issue facing Britain.

So if immigration is becoming less of a concern, does this softening of public opinion mean that the government has a bit more leeway in its approach to immigration policy? Should it relax its pledge on net migration targets? And in a year that saw the Windrush scandal come to light, has the public changed its mind about the types of immigration controls they want? The answer is not clear-cut.

First of all, the Brexit vote does not seem to have changed the public’s desire to see immigration numbers come down. Close to six in ten people still want immigration numbers reduced – a
figure that has remained virtually unchanged since the 1970s, when net migration was far lower than today’s levels. But Brexit looks to have had some effect; six in ten think it will reduce EU immigration, and 39% believe it already has. The public’s expectations about what will happen to immigration from outside the EU after Brexit are much more mixed; 41% expect it to stay the same while 22% think it will fall, and a quarter [26%] think it will actually increase. In the short term, Brexit and a commitment to bringing down numbers might reassure people, but we shouldn’t assume that all change since Brexit is due to more positive attitudes. Those who have become more positive are evenly split between being reassured that numbers are coming down or will come down [41%), and those who are now more likely to recognise the positive contribution of migrants [39%].

So what about the types of controls people want? And has the Windrush scandal changed opinion? The majority of the public feel ashamed about how Britain has treated the Windrush generation, but six in ten feel that the scandal was a result of government incompetence rather than there being something

OPINIONS ON IMMIGRATION HAVE SHIFTED SINCE JUNE 2016
Which of the following if any apply to your views?

The discussions since the vote to leave the EU have highlighted how much immigrants contribute to the UK

I am reassured that fewer immigrants will come to the UK once*
we actually leave the EU

There are fewer immigrants coming to the UK already*

*41% of people select either these options

Source
Ipsos MORI

Base
All who say they have become more positive about immigration since EU referendum (218), from 1,067 adults aged 18-75, online, 11-14 May 2018
wrong with immigration policy itself. Six in ten also support a ‘hostile environment’ policy that is tough on illegal immigration. But context is important, and stories of the Windrush generation being denied their rights because they lacked the right paperwork struck a chord with the public. When we ask people to choose between a system that is compassionate or hostile, two-thirds favour compassion i.e. an immigration system that protects people who have the legal right to be here – even if they can’t always prove it – over one that prioritises deporting illegal immigrants. So people seem to want it both ways.

The Windrush scandal does appear to have damaged perceptions of government. In March this year just over half the public (53%) said they were dissatisfied with the way the current government is dealing with immigration. This rose to 60% just after the scandal unfolded, taking dissatisfaction levels back to those seen in 2015. This increasing dissatisfaction seems to come primarily from Conservative supporters. Theresa May’s response has been to doggedly stick to her net migration target – a target that has never been met and that virtually no-one believes will be met, but one that signals that the government is still set on bringing down numbers.

But while numbers are important, we know that the public doesn’t want to reduce all types of immigration, particularly if it might damage the economy or public services. Our research shows there is strong support for allowing in more highly-skilled workers and lifting the cap on visas for non-EU skilled workers such as doctors, engineers and teachers.

But the question is what happens in the longer-term? Will falling EU immigration be countered by increasing non-EU immigration, as appears to be already happening? What if there is little change on net migration levels overall? Our Issues
Has Brexit ended Britain’s obsession with immigration?

Index shows that among those concerned about immigration, two-thirds (65%) say there are too many immigrants coming to Britain and we need to reduce numbers, compared with one in ten (10%) who say they are worried that too many immigrants are leaving Britain and the country needs immigration.

So, there are clear signs that Britons are becoming less concerned about immigration (even as across Europe concern has been rising). It has always been the case the public would support a more nuanced immigration policy that takes skills and other factors into account than headlines would suggest. However, most Britons still want immigration reduced (56%) and even though the number of people concerned about immigration has fallen, their focus is very much on numbers and if Brexit does not herald a new immigration policy that takes into account these concerns (even while allowing for support for more high-skilled immigration), their worries might return.

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FOUR OUT OF FIVE PEOPLE DO NOT BELIEVE BREXIT WILL HAVE ANY IMPACT ON THEIR TRAVEL PLANS, EITHER INSIDE OR OUTSIDE THE EU.
Each year our research reaches and involves over 3 million Britons on a range of topics. Of course, we don’t speak to everyone, nor do we need to; instead, we carefully construct samples to draw conclusions (within known margins of error) about sentiments across the wider population. We tend to express our findings as percentages. But what if, instead, we thought of Britain as 100 adults, akin to a village? We know a fair bit about the make-up of our village from similar exercises which have described their demographic profile – their age, tenure, income and so on – but what about their attitudes and behaviours?

Looking at our 100 through such a lens is not only fun, it is illuminating too. Our list of statistics is, at first sight, a curious, disparate montage of snapshots. But even a cursory scan hints at the zeitgeist, laying bare our concerns, preoccupations and interests.

What next for our village of 100? We will be watching, listening and learning.
What are we like? If Britain were a village of one hundred...

OUT OF THE 100 ...

85 think that Britain is very or fairly divided\textsuperscript{26}

84 have either travelled, were born or have lived outside of the county (it’s 70 in the global village)\textsuperscript{27}

81 own a smartphone\textsuperscript{28}

73 rate the quality of their healthcare positively (it is 45 in the global village)\textsuperscript{29}

68 are unfavourable to Donald Trump\textsuperscript{50}

66 thought at the start of the year that 2018 would be better than 2017\textsuperscript{31}

63 are ashamed of how Britain has treated the Windrush generation\textsuperscript{32}

63 think they can spot fake news (but only 41 think the average person can)\textsuperscript{33}

60 support building new social housing in their local area\textsuperscript{34}
59 think Brexit is the most or among the most important issues facing the country\textsuperscript{135}

55 are unsure or believe that there is a link between some vaccines and autism in healthy children\textsuperscript{136}

52 enjoy flying\textsuperscript{137}

49 think that socialist ideals are of great value for societal progress (but 51 disagree)\textsuperscript{138}

49 think the Brexit negotiations are going worse than expected (4 think that they are going better than expected)\textsuperscript{139}

45 think naming and shaming the retailers responsible would be effective in reducing problems caused by plastic (but only 18 would stop using those retailers)\textsuperscript{140}

42 say Prince Harry is their favourite Royal\textsuperscript{141}

41 think everyone in Britain currently enjoys the same basic human rights (35 disagree)\textsuperscript{142}

39 thought at the start of the year that a war between North Korea and the US was likely\textsuperscript{143}

38 think Britain needs to take more steps to open itself up to the world\textsuperscript{144}
What are we like? If Britain were a village of one hundred...

25 think things have gone far enough when it comes to giving women equal rights

19 think that the murder rate in Britain is lower now than in 2000 (they are correct)

17 expect the average UK house price to have fallen by March 2019

17 do not think of themselves as a ‘real Brit’

14 think the general condition of the economy will improve in the next 12 months

14 think that the new funding announced for the NHS by the Government will lead to actual improvements

11 are either vegetarian (7), or vegan (4)

11 identified pollution/the environment as the most important or among the most important issues facing the country (after the joint hottest summer for the UK)

8 think the Government should reduce spending to allow for tax cuts or less government borrowing

7 expect us to not leave the EU in March 2019

2 connect to the internet using a Dongle

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TWO-THIRDS (66%) THINK THE GOVERNMENT SHOULD INCREASE SPENDING ON PUBLIC SERVICES, EVEN IF THAT MEANS HIGHER TAXES OR MORE GOVERNMENT BORROWING.
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End notes

BRITISH MEN THINK WOMEN ARE HAVING SEX 22 TIMES A MONTH, COMPARED WITH AN ACTUAL FIGURE OF AROUND 5 TIMES.

WOMEN GUESS CLOSER TO REALITY ABOUT OTHER WOMEN’S SEX LIVES AT 12 TIMES, BUT ARE STILL OVER-ESTIMATING
End notes


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For image references please visit almanac.ipsos-mori.com/references-2018
TWO-THIRDS (68%) OF THE BRITISH PUBLIC HAVE AN UNFAVOURABLE OPINION OF US PRESIDENT DONALD TRUMP
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Please let us know what you think, and what you’d like to see in future editions.

Ben Page
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The Ipsos MORI Almanac is our light-hearted[ish] review of life, society, business, media and politics in 2018, with contributions and data from around the business.

We hope you enjoy our 2018 Almanac.

Please let us know what you think!