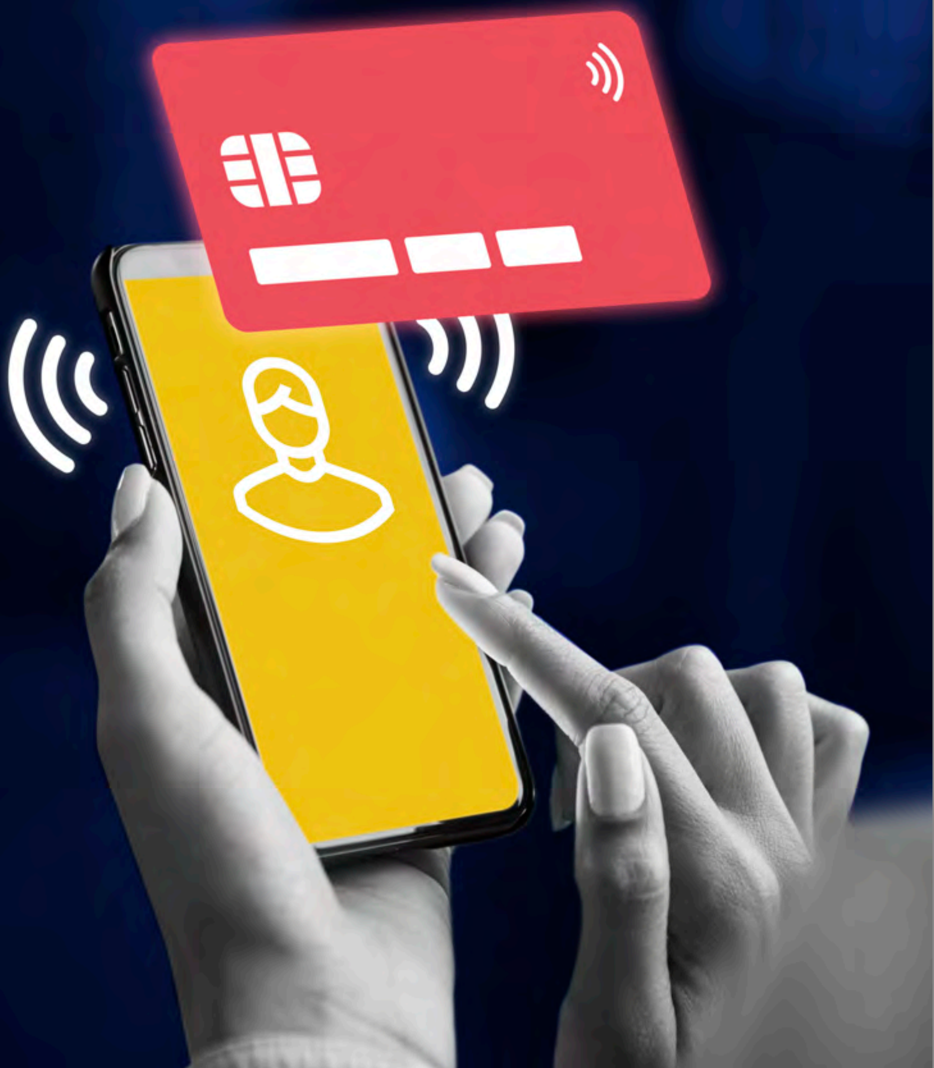
THE IPSOS MORI

ALMANAC

2019

Ipsos

Thirteen per cent of new current accounts opened in the UK from January to June in 2019 were with digital-only banks[i]



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Foreword

Welcome to our review of 2019: another year of Brexit and another general election. We are putting this review to bed before the outcome of the election and so we don't know if the Conservatives ultimately managed a significant majority, or had a shock similar to that of 2017. At the time of writing, a Labour victory looked almost impossible, and Jeremy Corbyn had not seen the kind of surge witnessed in 2017, despite many of his policies being popular.

While we have looked at politics in this edition, it's always a surprise to many clients that politics is only about 0.3% of our business, even in an election year. Tech and pharma companies, consumer goods and government are our main clients – politicians not so much. Similarly, much of our work no longer involves asking questions – we have, for example, just been awarded the contract to measure what people look at online for the UK from January 2021.

The issues facing Britain remain challenging – an ageing population, public services needing major investment, record employment, but also record concern over low wages and inequality, as well as falling investment. Both the Leader of the Opposition and the PM are very unpopular by historic standards.

Both Labour and the Conservatives have promised to increase public spending, which the public welcomes. The majority also say they favour tax increases to pay for this if necessary, although what people say and who they vote for are not necessarily the same: a key issue is always perceived competence.

The year saw climate change finally recognised as an issue, with some 78% of us saying we are heading for disaster if we don’t make major changes soon.[01] The Oxford English Dictionary has chosen 'climate emergency' as word of the year. Sales of electric cars hit 10%.[02] But we are only decarbonising our homes at the rate of 220 a week[03] – we need to be hitting 15,000 a week, and soon, to meet our targets for carbon reduction. There is no sign of a serious global consumer revolt against fast fashion – or flying. Annual global passenger numbers rose 7% last year to 4.4 billion,[04] as people in developing countries start to take the sort of flights we already take for granted.

The public remain worried about the state of the country as a whole and in 2019 Britons were among the most negative in the world about the future, with 79% saying the country was headed in the wrong direction.[05] The widespread feeling that we face an uncertain future is pervasive – one of the biggest shifts in Britain over the last decade has been the ‘loss of the future’: in 2003 only 12% of us thought our children would have a worse life than us. Since the 2008 crash it has risen, and now sits at 45%.[06] That is a huge psychological change, and coupled with a long slowdown in income growth for most people, explains the national mood.

Britons continue to believe we have more that unites us than divides

Most of us think we have a housing crisis in Britain. Economic confidence remains low.[07] Statistically, we are due a recession and the public expect an economic fallout from Brexit, in the short-term at least.

But as you read this we will have finished the election campaign, and it will nearly be Christmas, and so I'm going to focus on the positives. The first is that, in 2019, Britons continue to believe we have more that unites us than divides. We are not divided into 'Anywheres' or 'Somewheres' – in 2019 we found Leave and Remain voters equally 'attached' both to their local area and to Great Britain. Traitors? Saboteurs? Best confined to newspaper headlines.

Second is that whoever has won the election, we are heading for considerable increases in public spending on the NHS and police services, as well as infrastructure investment – which we say we welcome.

While Britons see little sign of Brexit divisions healing any time soon, and contemporary discourse is far too toxic, the British public has become significantly more liberal on moral issues over the last 30 years.[08] Our happiness has been rising for the last few years, according to the Office of National Statistics and we are taking more exercise.

Our report ‘Trust: the Truth?’ this year found no new crisis in trust – we have never trusted politicians. Although we are frustrated over Brexit, trust in ordinary people has actually been rising, and we trust experts more than in the past, as our annual Veracity Index shows this year.[09]

British institutions such as the monarchy, the NHS, BBC and armed forces remain popular (if not impervious to scandals and challenges). As last year, globally, our reputation among the public is still holding up – the UK remains one of the most well regarded countries on the planet,[10] despite Brexit. In America, Trump has retained relatively positive personal ratings in a polarised country, but has severely dented Brand America globally. Brexit has not done the same to Britain.

All that remains for me is to wish you and your family our best wishes for Christmas and for 2020 – with the prospect of a new decade of surprises; hopefully some of these will be positive. It is, after all, Britain – one mustn’t grumble!

Ben Page
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Two in five (40%) people in Britain think that the most important factor in achieving equality between men and women is equal pay[ii]

The unpredictable state of British politics

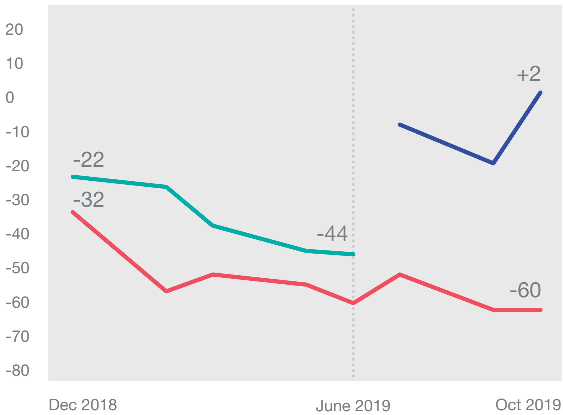
BY GLENN GOTTFRIED
Research Manager

Unpredictable would be a generous description of the state of British politics in 2019. Three years on from the referendum, Brexit claimed the career of yet another Conservative leader.

After reaching an agreement with European leaders on the terms of Britain's withdrawal from the EU, Theresa May's first net satisfaction rating of the new year (the proportion of the public satisfied with her, minus those dissatisfied) stood at -25. Though in negative territory, she was well ahead of the opposition's Jeremy Corbyn, who had a rating of -55.

Leadership satisfaction ratings of the Conservative and Labour party leaders

Net leadership satisfaction ratings
Dec 18 – Oct 19



Johnson

May

Corbyn

Source
Ipsos MORI Political Monitor

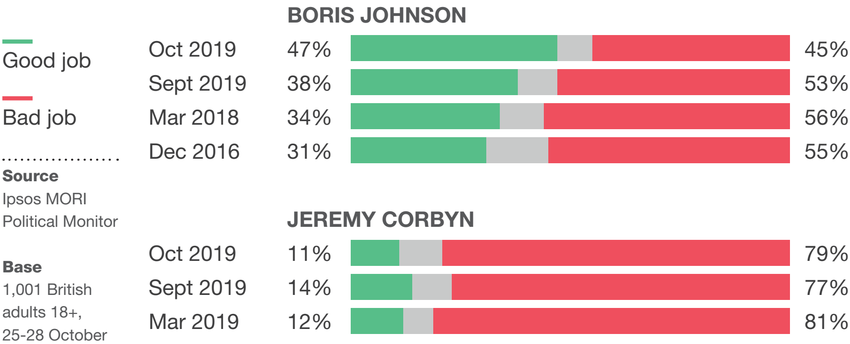
Base
c.1,000 British adults aged 18+ each month

Public and parliament alike, however, were not keen on Theresa May's withdrawal agreement. MPs voted it down twice (the second time with minor changes to the agreement) while nearly two-thirds of Britons thought her agreement would be a bad thing for the country. By June, her net leadership satisfaction rating dropped again, though it remained higher than Corbyn's. Most Britons thought she was doing a bad job at handling Brexit while her own party supporters were split on her performance. This, coupled with an abysmal European Election result for the Conservatives, finally persuaded her to step aside, paving the way for Boris Johnson.

Although Boris Johnson walked into office with stronger leadership ratings than his predecessor left with, it wasn't the best of starts. His net satisfaction rating in July was the lowest opening rating Ipsos has recorded for any Prime Minister since 1979 (though still much higher

46% think Boris Johnson is doing a good job handling Britain's exit from the European Union

Do you think each of the following has done a good job or a bad job at handling Britain's exit from the European Union?



Source
Ipsos MORI Political Monitor

Base
1,001 British adults 18+, 25-28 October 2019

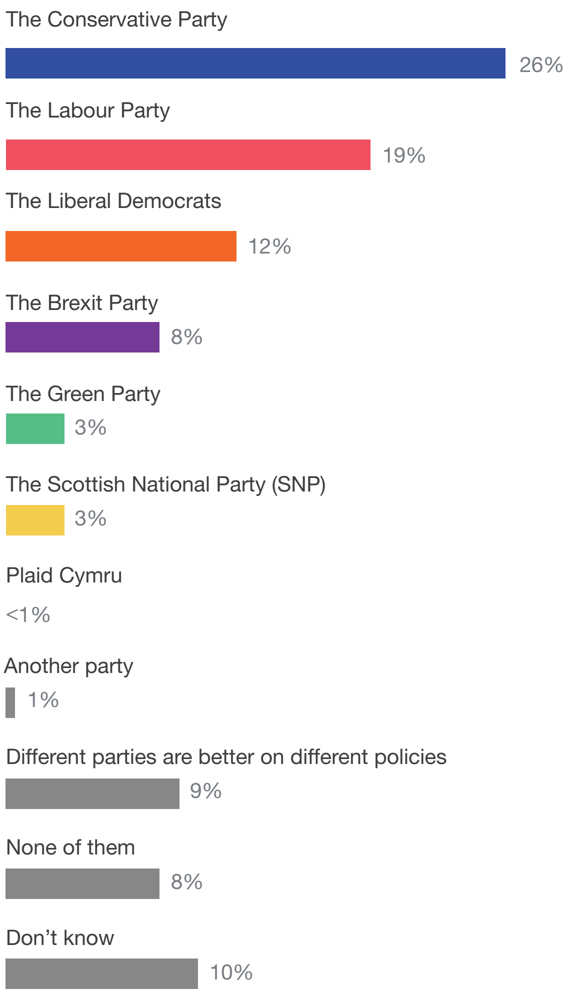
than Jeremy Corbyn's). Just a third of the public were confident that he'd get a good deal for Britain in the Brexit negotiations with other European leaders. In September, a slim majority said he was doing a bad job at handling Brexit – only a slight improvement from where Theresa May left things – but better than the proportion of people saying Jeremy Corbyn was doing a bad job. Johnson, like May, could take comfort in Corbyn's figures being worse.

Then the breakthrough few may have been expecting – Johnson struck a new withdrawal agreement with the EU. The deal was met with little public enthusiasm, although it was still better received than May's. Thirty-eight per cent thought Johnson's deal would be a good thing for Britain (44% said a bad thing) compared with a quarter (25%) who said the same for May's deal (62% said a bad thing).

Even with an apathetic reception for his deal, Johnson received a boost for getting it done. His net leadership

Which party has the best policies?

Thinking about the issues which are most important to you, which party, if any, do you think has the best policies to address them?



Source
Ipsos MORI General Election 2019 Campaign Tracker

Base
1,140 online British adults 18+, 8-11 November 2019

satisfaction rating moved into positive territory by October, while more saw him doing a good job at handling Brexit than in September – though the public were now split on this. At the same time, Jeremy Corbyn saw the worst net leadership satisfaction ratings of any opposition leader recorded since 1979.

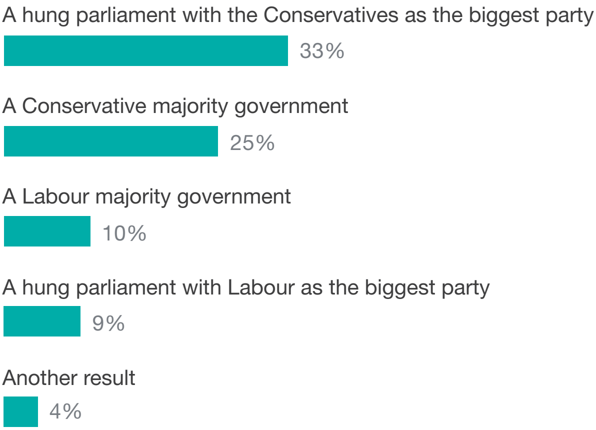
The first few weeks of the election campaign saw the Conservatives in a better place than Labour, with a double-digit lead in voting intention. The country remained divided on Brexit. In October, 41% wanted another referendum, with Remain as an option, compared with 40% who thought Britain should leave the EU even if there was no deal. By the time the election was called, Conservatives had the advantage of consolidating most Leave voters as the Brexit Party began to fade, standing down in Conservative-held seats. Remainers, however, were still unclear if Labour or the Liberal Democrats were the better option: as for the last three years the Remain vote has been divided.

What Brexit has revealed is that while our left-right division over whether we want a more Scandinavian or American type economy, represented by the Labour and Conservative parties, remains, there are now new splits across the left-right divide. Immigration, Britain's past, law and order, and even morality are all issues which unite Leave and Remain voters regardless of which of the two major parties they support. They show how the two main parties, even as they squeeze the smaller ones in this election, face an ongoing challenge in holding their supporters together.

Although this election was very much about Brexit (55% said it was very important in helping them decide who to vote for), other issues mattered too. More than half (54%) said the NHS will be important in helping them decide

What will the election outcome be?

Thinking ahead to the next general election, which of the following outcomes do you think is most likely?



Source
Ipsos MORI General Election 2019 Campaign Tracker

Base
1,140 Online British adults 18+, 8-11 November 2019

their vote, compared with 31% who said crime, 31% care for older and disabled people, and 27% protecting the environment. The Conservatives started the campaign with a slight edge over Labour, with more saying they have the best policies to address the most important issues.

When it comes to unpredictability, Britons weren't sure at the start of the campaign on what to expect from this election. A third thought it would be a hung parliament with the Conservatives as the biggest party, while a quarter thought it would end with a Conservative majority. When you read this, we'll be on the verge of finding out if they were right. Maybe British politics is about to become more predictable after all.

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Less than one in five (17%) trust the 'British Establishment' to put the needs of the nation first when it comes to Brexit[iii]

Gaming, influencers and the future of entertainment

BY STEPHEN JOHNSON
Research Director

LAMBERTO FERRARA
Research Manager

2019 was the year the young went wild for Fortnite. It achieved more than 250 million players and Epic Games (the studio behind it) was valued at more than $15 billion. Despite the various controversies surrounding it, there is much to learn from the game's success about engaging Generation Z and understanding the future of gaming.

Fortnite gameplay isn't particularly revolutionary. As a multiplayer third-person shooter game, its narrative revolves around an island where 100 players battle to be the last person standing. It is free to play, with the

A virtual skin carries as much social currency as a new pair of Nike trainers

option for in-game purchases to update your ‘skin’ (your character’s appearance) or purchase ‘emotes’ (moves and dances). Fortnite’s distinction is in its social elements. It not only requires team play and strategy: in its online community, a virtual skin carries as much social currency as a new pair of Nike trainers, especially if supported by a network of celebrities and influencers.

To tackle such a multifaceted phenomenon, we designed a holistic approach combining video diaries with players to understand their behaviours, discussions with parents, as well as using semiotics and cultural analysis to examine the broader cultural landscape.

Our research revealed that the game’s success in engaging its audience came down to three main factors: how it is recycling and refreshing pop culture, its relationship with influencers and gamers, and embracing ‘virtuality’.

The pop culture cycle

Fortnite constantly draws from and uses pop culture, borrowing from a variety of sources, including: TV, cinema, memes and viral videos. There are numerous examples of this, but probably the clearest are the emotes. Take for

Source
IT – Stephen King (2017)

www.youtube.com/v=Wo87J6ap5O8

example the emote titled ‘take the L’, which was inspired by the 2017 remake of Stephen King’s ‘IT’.

The game recycled an element of the 2017 movie without mentioning the original reference. Gamers started using the emote in the game and then took it to the real world where young people (some of whom didn’t play Fortnite), started doing it. At the same time new memes and user-generated content created new viral clips. When footballer Antoine Griezmann performed the move at last year’s World Cup the emote reached worldwide notoriety across new audiences, who were possibly not familiar with the game.

Looking to understand what Griezmann’s bizarre dance meant, many people discovered Fortnite and, possibly, ‘IT’ – or at least the relevant clip. This circle of pop culture references delights both players who recognise the references, and those who subsequently discover the original sources.

Fortnite’s relationship with gamers and influencers

Using pre-existing content without any explicit reference to its creators has naturally caused some controversy,

New technologies and societal changes are causing these virtual worlds to become an extension of our everyday reality

especially related to copyright infringement and cultural appropriation. But Fortnite also offers an opportunity for the creators of this content. As a platform with more than 250 million players, the external content it uses gains exposure and is opened up to a new generation.

Many of Fortnite's players are young celebrities and content creators who mention the game during interviews. Additionally, Fortnite has been able to include some of its audience's feedback by adding skins inspired by memes and fixing issues in the game.

This creates a sense of inclusion which resonates across audiences who want to have a more active role in the content they consume and at the same time generate a cross-media phenomenon which transcends gaming.

The move to 'virtuality' – a trend for the 2020s

When young people spend so much time in a virtual world, socialising and developing deep relationships with other inhabitants of the same online community, their virtual accessories and cosmetics gain a very similar value to their 'real' clothes or physical possessions.

Although ‘virtual’ is often perceived to be the opposite of, or an alternative to ‘real’, new technologies and societal changes are causing these virtual worlds to become an extension of our everyday reality and tangible representations of our personas.

This provides a valuable opportunity for brands to think more holistically about how they use the virtual world. It isn’t just about targeted ads, they need to leverage the shift towards an online life. For instance, Fortnite holds ‘live events’ in a virtual space and last year more than 10 million players watched DJ Marshmello perform a live concert within the game.

Other brands are also taking note. Active Voice used an augmented reality experience where products virtually appeared in a platform such as Pokémon Go, where consumers could walk towards the items and put them in their virtual shopping bag. Meanwhile, Nike created a virtual queue for their Air Max product launch, where consumers created avatars to queue for a virtual sneaker drop, in turn giving them the opportunity to buy new products.

Virtual reality is now an important tool in the creation of events and experiences, and opportunities for new ways of engaging audiences multiply exponentially. The line between the virtual and the real is getting increasingly blurry, and the way brands will be able to leverage both will define how they will engage with Gen Z, and following generations.

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The state of trust in 2019

BY CARL PHILLIPS
Research Director

"There is a crisis of trust in society!" says the media.

"Trust in politics is in crisis!" say politicians.

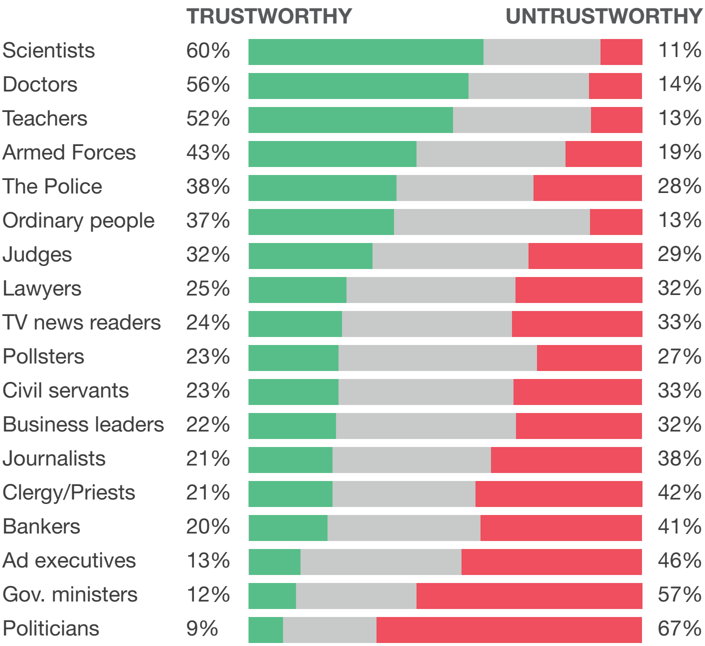
"Trust in business is at crisis point!" say the PR companies.

"Trust as a concept is in crisis!" say people trying to sell business management books.

It's no wonder, therefore, that under this bombardment of negativity, many people would say that yes, trust probably is in crisis.

Global trustworthiness of professions

Please look at this list of different types of people. In general, do you think each is trustworthy or untrustworthy in your country?



Source
Ipsos Global Advisor

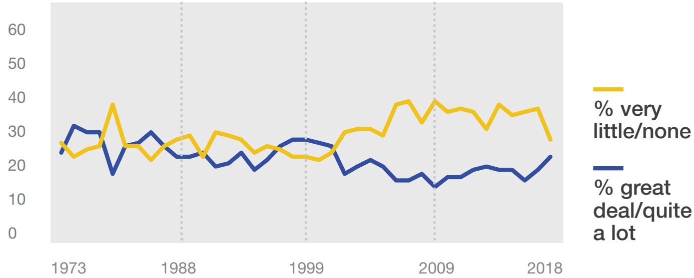
Base
17,793 adults aged 16-64, interviewed October 2018

But what is it that brings these groups together, aside from the fact they are all trying to sell you something (be it a product, a service or themselves)? A good answer is that all of them are far more distrusted than trusted by the general public on a global level, according to our Global Veracity Index. It begs the question, why we are listening to them on anything, let alone on whether trust, a concept so fundamental to society and business, is somehow in crisis?

This is topical because after more than a year of research, we at Ipsos MORI (a blend of pollsters and scientists) are strongly of the opinion that trust is a problem for many

Confidence in 'big business' in the US

% saying they have confidence in 'big business' – US



Source
Gallup – Confidence in 'big business' Poll

kinds of institutions, but that the idea that it is a recent crisis is false. Instead, we say that the problems started decades ago and it has just taken everyone a while to take notice.

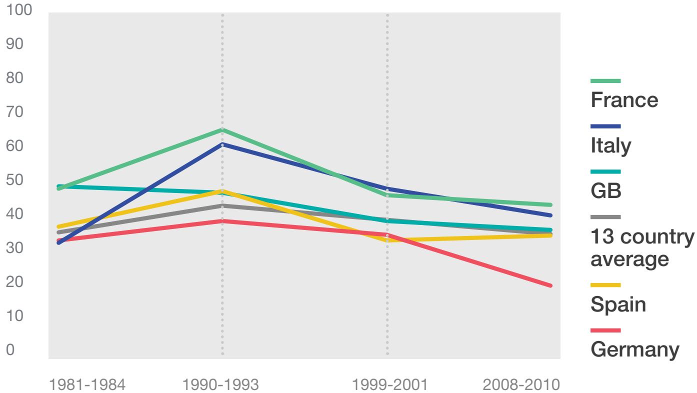
Let's examine some of these trends in detail, starting with trust in business. A crucial caveat is that long-term trends in trust are rare, which forces us to look at trends for other, similar concepts such as confidence in business as a proxy for trust in business.

Gallup has been running its US 'Confidence in 'big business" tracker since 1973. Over the period 1973-2008 confidence in 'big business' fluctuated from a high of 34% in 1975 to a low of 16% in 2009, with year-on-year changes rarely more than a couple of points. Over the same period, the proportion of people who say they have very little or no confidence in business has fluctuated similarly. Crucially, in 2001 those with low confidence in business started to dominate, and while they have outnumbered their more positive counterparts ever since, at the same time trust in 'big business' is now higher today than a decade ago.

Not much sign of a current crisis so far. So, let's look at the European Values survey data. Overall, it is a similar

European confidence in major companies

% saying they have confidence in major companies – Europe



Source
General Social Survey

trend to the US – from a high in the early 90s to a more negative position today. In Germany, confidence in major businesses nearly halved between the early 90s and the late 2000s, with others such as France and Italy having similar trends.

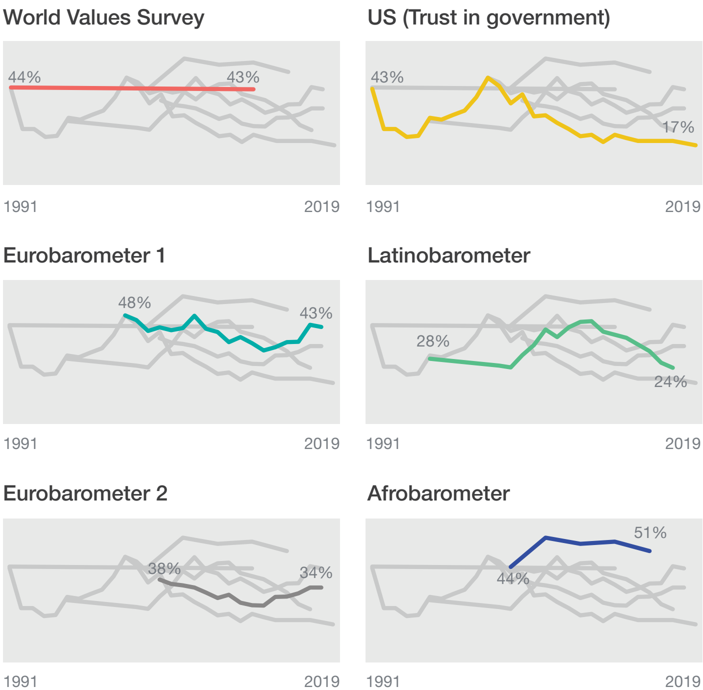
This looks a lot like public confidence in business, and we can infer trust, shifted significantly in the 90s, but in the last decade or so it has been largely static. Some crisis.

I think we can agree that if the media are right about anything it's that there is a crisis of trust in public attitudes towards Government and politics. Trust in MPs and elected officials is low everywhere, and this has been the case for a while. A closer look at the survey data suggests that trust in Government and politics has been low for years.

In the US the story is, again, one of long-term decline. In the 1950s and 60s a majority said they trusted the

Recent trends in trust in governing institutions

% trust/confidence in Government/parliament



Source
World Values Survey - confidence in parliament, 53 country average
Eurobarometer 1 - trust in Government, EU15 average
Latinobarometer - confidence in Government, 15 country average
Eurobarometer 2 - trust in Government, average of new EU member states and Turkey
Afrobarometer - trust in parliament, 16 country average
Pew Research Centre

Government in Washington most of the time, but this took a sharp drop in the 1970s to just one in three. Since then it has risen and fallen twice, but for the last decade it has been consistently low and largely static.

However, other trends are far less clear. Looking at the World Values Survey, more countries actually saw a rise or no change in confidence in their Government between the 1990s and 2010s than saw a fall.

In Europe, according to Eurobarometer, of the 18 countries surveyed between 2001 and 2018, while eight showed a fall in trust in Government overall, another seven showed no change or even a rise. Europe, overall, showed some signs of recovery from the low in public trust in Government in the post-2010 period, although this hides individual country variation.

We would argue that this clearly illustrates that the idea of a global crisis of trust in politics is false. That is not to say that the public anywhere actually fully trust their politicians or Government institutions, because they clearly often don't, but this changed years ago and, in some places, things are improving.

While we are under no illusion that when pitted against the mass ranks of the media, politicians and PR companies, Ipsos MORI alone will not change the narrative on trust and convince the world the situation is not quite so bleak, we do hope that we have sowed the seed of doubt and people will begin to question the accepted narrative a little more because, under a little scrutiny, it begins to fall apart. That does not mean we take a naïve, optimistic view, rather we think a more in-depth understanding means that we can focus on more specific actions that will help make a big difference.

For further insight, read 'Trust: the Truth?' at thinks.ipsos-mori.com/trust-the-truth

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Three in four British adults think that it should be a criminal offence to spread fake news deliberately[iv]

Bursting the vaccine hesitancy bubble

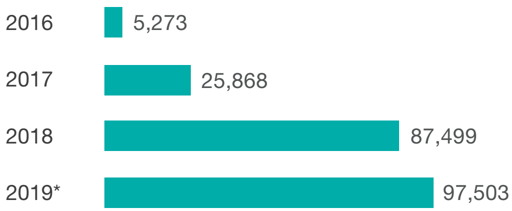
BY FRANCES SALT
Research Executive

Two decades on from the publication of Andrew Wakefield's refuted paper linking autism in childhood with the MMR vaccine, the spread of fake news online has contributed to vaccine hesitancy now being one of the top ten threats to health, globally.[11]

Referred to as the 'delay in acceptance or refusal of vaccines despite availability of vaccine services' by WHO,[12] vaccine hesitancy is being credited for the demise in coverage for all routine childhood immunisations in the UK.[13]

Measles cases in Europe have snowballed since 2016

Total number of measles cases in Europe each year



*(Jan-Aug)

Source
World Health Organisation EpiData, October 2019

The proportion of children receiving their first dose of MMR now stands at just 90.1% – well below the 95% required for herd immunity. As a result, the UK has now lost its measles-free status.[14]

While the majority of parents do vaccinate their children, recent measles outbreaks show what can happen when even a small proportion of the population put their own individually held beliefs, while often well intentioned, ahead of recommended public health measures. In Europe, measles cases have snowballed since 2016, as shown above. Worryingly, it has also been revealed that a measles infection can deplete a child's immunity against additional viruses and bacteria.[15] Much deliberation has been given to potential interventions aimed at stemming the tide of vaccine hesitancy. However, will these policy changes be effective in addressing the underlying determinants that cause a lack of confidence in vaccines?

The current Health Secretary, Matt Hancock, said he was considering "all options" to improve vaccination coverage in England, and that there is a "very strong argument for movement to compulsory vaccination".[16] Mandatory vaccination policies ahead of kindergarten admission are widespread across the US, with varying exemption criteria

The spread of fake news online has contributed to vaccine hesitancy now being one of the top ten threats to health globally

in place, ranging from medical to religious reasons. In states where this criteria is most difficult to attain, rates of vaccine-preventable diseases are lower.[17] A model exploring the effects of the 'no jab, no play' policy demonstrates that compulsory vaccination strategies can remarkably increase coverage and decrease infection rates in high-income countries.[18]

Four interventions, aimed at shaping behaviour rather than changing minds, have been found to encourage uptake of vaccines.[19]

1. Making vaccination the default option, requiring parents to opt out rather than in.

2. Using reminders via email, text or phone to prompt when the need for vaccination occurs.

3. Encouraging parents to make a concrete plan for getting vaccinated.

4. Making vaccination a requirement, e.g. for school admission or employment.

It has become obvious that just stating the dangers to the masses doesn't address the individual fears of the few

It can be argued that mandatory vaccination touches on all four of these techniques. Making it a requirement of school admission automatically makes vaccination the default, and provides parents with a concrete logistical plan for when to vaccinate. Reminders can then be sent through the already established communication channel of the admissions process.

However, these interventions rely on parents being in favour of vaccinations in the first place; which we know is not the case, at least not universally. For this reason, many senior medical professionals do not support making vaccinations mandatory.

Vaccination is perhaps a victim of its own success. In eradicating or making easily treatable so many infectious diseases that were once so prevalent, parents nowadays can be forgiven for underestimating the risk and consequences of disease. Vaccine hesitancy is greater in higher-income countries,[20] because here our disease burden has now shifted so heavily to non-communicable diseases. Cancer, which affects one in two people,[21] we see as a dangerous threat which commands our humility. Whereas diseases which historically impacted swathes of the population such as tuberculosis and polio seem in contrast, like relics from the past – toothless in the face of modern medicine.

However, hesitancy around vaccination is not just a western phenomenon. In order to counteract it on a global scale the medical community must improve its communication strategies. It has become obvious that just stating the dangers to the masses doesn't address the individual fears of the few. We must become better at understanding their point of view and become better at communicating to reluctant ears.

By adopting a more emotional and persuasive rhetoric like that of the anti-vaccination community, healthcare providers could provide a compelling argument in favour of vaccines.

As with the most effective marketing campaigns, a clear message, a compelling narrative, and an overriding emotional sentiment may go a long way to convincing parents that *your* child may be in danger.

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Mind the (financial) gender gap

BY STEPHANIE MENSAH
Research Director

JESSICA LONG
Research Director

What if women ran the financial services industry? It's an intriguing thought. Arguably, things would work a little differently than they do now. Imagine a world where, even with the same incomes, women:

- had twice as much in their savings as men
- retired with three times more in their pension pot than men
- were five times less likely to be in poverty once they reached their 60s
- invested more and ultimately, made their money work harder than men.

Quite a paradigm shift, eh? And, if you feel outraged at the suggestion of such a change in this historical narrative (those poor men!), then we need to ask – why aren't we equally outraged that this is the real-life financial situation women face today?

But let's take a step back. How did we get here? The financial services industry overlooks two critical elements in fostering engagement among both genders:

1. women lead vastly different lives than men; therefore

2. women have vastly different need-states when it comes to money; and, therefore

3. women behave very differently when it comes to their money.

The industry has, for far too long, administered a 'one-size-fits-all approach' to financial services, products and engagement channels. In doing so, it has overlooked the fundamental needs of half the population.

Qualitatively, we have observed an incremental increase in women's spending. Even when we account for shared household finances, women are more likely to absorb incremental expenditures than men. Buying 'top-up' shopping more frequently, paying for childcare, or pocket money for their adult children. At every stage of a woman's life, she's often the one picking up these additional costs – ensuring the family unit is functioning financially.

This is further exacerbated by unexpected life events. She is more likely to raise children in a single-parent household, halt her career to take maternity leave, serve as a carer to elderly parents or even financially support a relative.

For far too long, the industry has administered a 'one-size-fits-all approach' to financial services

In other words, women's pockets are more likely to have more 'holes' compared to men's. As such, women prioritise savings – specifically, a financial cushion to account for these sudden dips. It is not surprising then that women view savings as more important than investing. A considerable amount of women's money engagement is in the here and now, not in 20 years' time.

> **Saving is more important than my pension – I might be living off my pension, but what do I do if the tiles start to fall off my roof?**
> Kath, 52

Yet, women also save less than men. The average saved by men is £38,500 compared to £20,275 for women.[22] The industry needs to change and adapt to the needs of women as it has before.

After the first World War, the UK Government needed to raise money quickly, which it accomplished with War Bonds: long-term investments, overwhelmingly bought by men. But women needed instant access to these funds. The moment the industry made the bonds instant access, they saw an unprecedented uptake in bonds taken out by women.

Flash forward a hundred years later, and we're yet to apply the learnings of a gendered lens in the financial services sector.

But there is hope. There is an appetite for industry change and more appropriate products and services for the overlooked women – 51% of the population. One of the changes could, and should, be in how these organisations communicate.

We know that while women and men both engage with social media equally, the channels they use vary. Men are more likely to use informative, data-sharing channels such as LinkedIn and YouTube; the same places that you see financial advice columns and DIY videos on investing.

Women are more likely to use Instagram, Facebook and Snapchat; channels that involve sharing and 'word of mouth' recommendations. The industry can explore what role these can potentially play in disseminating information to women in a more direct and targeted manner.

Now let's imagine another world. Where the financial services industry recognised the unique lives, needs and behaviours of both men and women. Where both were actively engaged in making their money work harder in both the short and long term. The prospect of this new world is not only attractive for women, and men, and the financial services industry, it's also entirely achievable.

Which begs the question: why isn't the industry making this happen?

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Thirty-four per cent of women are likely to be reliant on a state pension compared to 25% of men[v]

From climate apathy to climate emergency

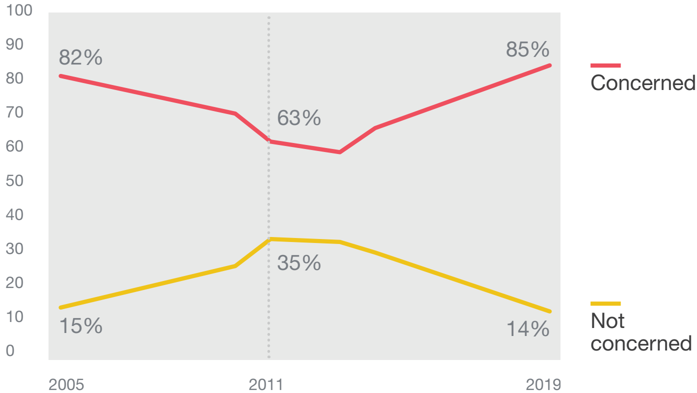
BY SAM RIDOUT
Research Manager

2019 has been a year of climate records broken[23] (again) and, as the Met Office confirmed a new UK record temperature of 38.7C, there has been report[24] after report[25] showing that we are heading for catastrophe. Not even our butterflies will be spared.

Amid the gloom, shifting UK attitudes give cause for some optimism; the public now see climate change as an increasingly pressing issue, and they want action. But we have been here before, only to see climate change fall back off the radar. Will it be different this time?

Concern about climate change has reached record levels

How concerned, if at all, are you about climate change, sometimes referred to as 'global warming'?



Source
Ipsos MORI Political Monitor

Base
c.1,000 British adults each month

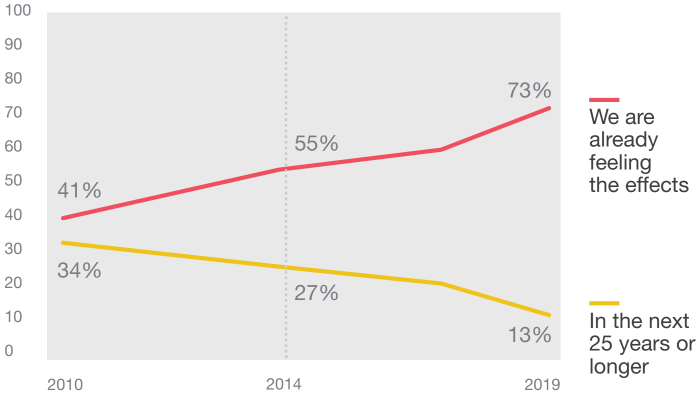
The UK is not on track to hit its target to bring emissions to net-zero by 2050.[26] Meeting this target will require a step-change in action from policymakers, businesses and brands, as well as the public.

Good news, then, that public concern about climate change is higher than ever before. But does this mean that climate change will finally get the focus it needs?

Not necessarily. Public concern was at a similar level 14 years ago, only for apathy and inaction to set in as priorities changed, with the global recession overwhelming longer term concerns with short-term financial worries. But there are reasons to believe the climate will remain a hot topic this time. More people are noticing the effects now; 73% think Britain is already feeling the effects of climate change, up 32% from 2010. The public also understand the need for urgency and want more to be

Three in four think that Britain is already feeling the effects of climate change

When, if at all, do you think Britain will start feeling the effects of climate change?



Source
Ipsos MORI Political Monitor

Base
c.1,000 British adults each month

done: 55% think Britain should bring emissions to net-zero before 2050.

The Greta Thunberg effect

The rising tide of younger generations may also help to keep the climate high on the agenda. In just over a year, the school strike for climate campaign has grown from a solitary Swede to a worldwide movement of millions. Younger generations have grown up witnessing the effects of climate change and 18-24 year-olds are more aware of the issues climate change causes, such as drought, regional conflicts, security risks and ocean acidification, among others.[27] Just 4% of the British public spontaneously name 'pollution/environment' as the most important issue facing Britain today, but this rises to 10% among 18-24 year-olds.
For policymakers and governments it may now be more difficult to shake climate change off their list of priorities.

But it's not just the youth who are taking to the streets in protest. At the time of writing, parts of central London have been shut down in the latest protest by Extinction Rebellion. This is an unprecedented era of climate activism that could keep the climate under the spotlight.

Agents of change

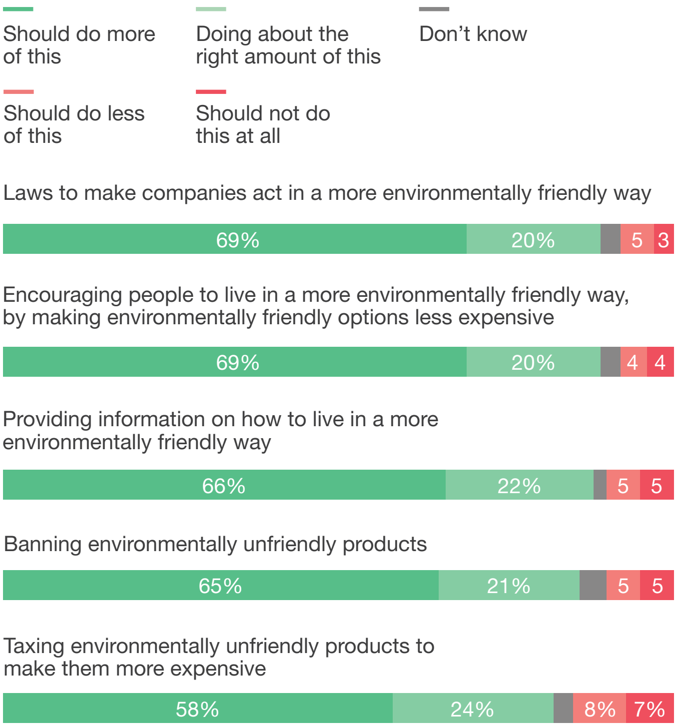
Still, keeping everyone focused on climate change requires more than public pressure. Policy itself can drive perceptions, rather than vice versa. After the Government introduced the 5p bag charge, people became increasingly positive about it, with support in England increasing from 52% before it was introduced to 62% just six months later: plastic bag usage fell by 85%.[28]

This year, the Government and local councils declared a 'climate emergency'. This is mostly a symbolic gesture for now, but the change in language may help. The term 'climate emergency' carries a sense of urgency and a call to action that 'global warming' and 'climate change' lack. It is also a statement of intent, and that could be important in keeping spirits high. Thirty-eight per cent say that if they had more hope that we could reduce climate change, they would be more likely to act. This is also an important consideration for messaging about climate change. The public need to know the consequences of their inaction, but there does need to be a sense of optimism to empower people to act.

The vast majority of scientists agree there is a climate emergency, but if it doesn't feel that way, there won't be an emergency response. We will keep watching in the 2020s to see how this progresses and, as our recent study for Deloitte showed, the public say they are willing to see big changes.

There is a high demand for the Government to take action on the environment

For each of the following, do you think government should do more, less, is doing the right amount, or should not do it at all?



Source
Survey on behalf of Deloitte LLP for The State of the State 2019

Base
c.1,360 UK adults

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An ugly attitude: the UK's perspective on 'beauty'

BY IMOGEN GRANDON-WHITE
Research Executive

14 June 2019 marked a historic day for the UK advertising industry: the Advertising Standards Authority (ASA) banned gender stereotyping in advertising. The ASA highlighted the connection between harmful stereotypes and the restriction of people's choices, aspirations and opportunities.

The guidelines gave the industry tangible examples of what to avoid in advertising, focusing on six key areas: roles, characteristics, mocking people for not conforming to stereotyping, sexualisation, objectification and body image.

The ban, however, drew criticism from some of the British public, with many declaring that it was excessive and controlling. Unsurprisingly, the ad industry also expressed consternation, as the Institute of Practitioners in Advertising (IPA) announced that the rulings were 'concerning' and the Incorporated Society of British Advertisers warned that they could cause 'confusion' in the industry.

So, is it true that this ban is unnecessary and harmful? Ipsos MORI's 'Global Attitudes Towards Beauty' study confirms that harmful gender stereotypes still exist. Global averages prove that, even today, men and women have very different ideas of beauty. A man's financial (46% for males and 32% for females) and professional (48% for males and 36% for females) success contributes to his attractiveness considerably more than a woman's. In contrast a woman's physical appearance, such as her facial appearance (46% and 39%) and the appearance of her skin (42% and 36%), are considered significantly more important in making women attractive than in men.

The feminine beauty ideal, where physical attractiveness is viewed as one of women's most important assets has been challenged recently by activists such as Jameela Jamil, who launched the 'I Weigh' movement. This online campaign tries to illustrate the other attributes a woman should be measured by, other than her weight. Further afield, South Korean women are also rebelling against their society's rigid beauty standards with their 'Escape the corset' movement.

Meanwhile, there is also rising awareness of the harmful impact of societal expectations on men to embody the role of 'provider', and the pressures that brings. These pressures contribute to the poignant statistic that, in the UK, men are three times as likely to kill themselves than

Ipsos MORI's data on beauty uncovers something even more provocative: it is men who drive both stereotypes of men and women

women, and suicide is the single biggest killer of men under 45, according to the Campaign Against Living Miserably (CALM).

The UK data uncovers something even more provocative: it is men who drive both stereotypes of men and women. For example, 34% of men believe a woman's facial appearance is important, whereas just 24% of women believe this. Similarly, 38% of men assert that 'sexiness' is necessary in making a woman beautiful, whereas only 15% of women believe so.

Twenty-four per cent of British men are still more likely to believe the stereotypical 'male ideal' of financial success making a man attractive, while just 17% of women do. It is significant that this trend is also seen in other established economies. For instance, despite Sweden having the highest level of equality in the world, 21% of men believe financial success is important in making a man attractive, whereas only 12% of women think this. This may suggest that men subconsciously have more stereotypical expectations of gender than women.

Men's continued control over gender expectations in advertising, marketing and policy strategies means that, arguably, the focus of change should be on them

This idea brings to light the disparity between men and women's attitudes towards traditional gender expectations. The data shows progress needs to be made in freeing men's preoccupation with fulfilling the 'provider' role, as well as liberating women from the pressure of one-dimensional beauty standards.

Men's continued control over gender expectations in advertising, marketing and policy strategies means that, arguably, the focus of change should be on them. As the first few ads are banned, could the ASA ban go even further and expose the powerful impact of media on (particularly men's) beliefs about gender standards? Either way, the research confirms that the ban is absolutely necessary.

With any luck, we'll one day look back on this article and regard it as quaint and ridiculous to have had to even worry about this. But I fear we're still a long way off.

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Only 12% of Britons view make-up as an important contributor to a woman's beauty[vi]

The perils of short-termism – can the brand builders fight back?

BY JON HARPER
Head of Brand Health Tracking

In 2019 our advertising and media choices were more short term than ever. These are impatient times. We often seem to value the instant hit of immediate gratification over waiting for more worthwhile rewards. In communications short-term gains are favoured over long-term brand building. But are organisations losing out on the financial benefits delivered by creative, memorable campaigns that prime people to choose the brand?

Marketing has an addiction to 'now'. All we seem to care about is real-time data, quarterly reporting cycles, disposable campaigns and easily measurable immediate responses. Often the discipline of brand building – creating Brand Mental Networks through communications or experiences – has been sacrificed at the altar of short-termism.

We think the shift to short-term sales activation is damaging organisations' potential to realise the more valuable long-term benefits delivered by strong brands; namely more penetration, better customer retention, more market share, less price sensitivity and more profit.[29]

It is most certainly diminishing the power of creativity.[30] The Institute of Practitioners in Advertising's 2019 report 'The Crisis in Creativity' should really have concentrated minds. Among other things, it noted we have 'arrived in an

Source
Amazon Echo and RNIB – Morning Ritual

www.youtube.com/watch?v=iYOSb5eyXa0

Source
Direct Line – Getting things fixed fast

www.youtube.com/watch?v=4c8NfNnbLkE

era where award-winning creativity typically brings little or no effectiveness advantage'. It highlights a shift to short-term campaign goals and its impact on strategy, creative and media choices. This has conspired to prevent creative campaigns from excelling at what they do best: strengthen a brand over time. To make matters worse, judges are now also favouring 'disposable' creativity, rejecting work that would give better returns in the long run.

Was anyone swimming against the rising tide of short-termism?

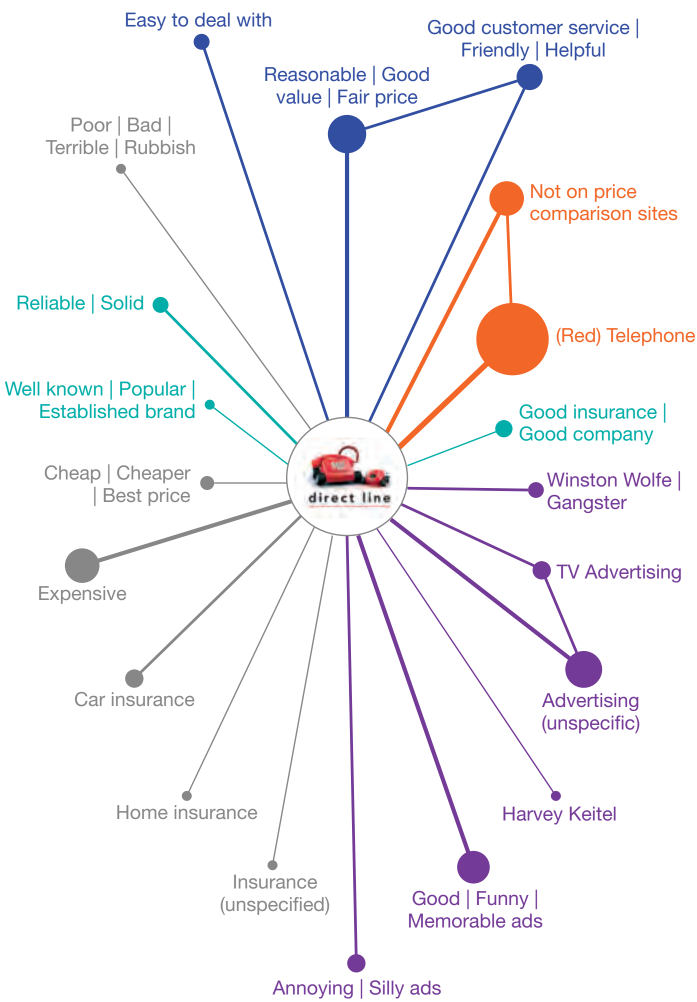
So, in 2019, has anybody been bucking the trend and seeking a Brand Mental Network full of relevant, distinctive, emotionally charged associations which 'prime' the brand to be thought of in the moments that matter?

Well, Amazon's work for the Echo voice assistant has certainly been delivering highly creative and emotionally resonant brand building, culminating in a campaign approved by the Royal National Institute of Blind People which showed how Alexa can become a vital part of a morning ritual for a blind person. It is illuminating that Amazon, a brand that knows so much about its customers – seemingly a happy hunting ground for data-driven, real-time communications aimed at getting the immediate sale – have recognised there is still an important role for high-reach, highly emotional creative content.

Direct Line's Mental Network encapsulates their success

Direct Line's long-running campaign is well worth mentioning. They have continued using Harvey Keitel's pastiche of his Winston Wolfe character from 90s classic Pulp Fiction, with the moniker 'the Fixer'. This campaign played a big part in rebooting the brand by delivering a bold, confident and humorous depiction of 'hassle-free insurance that just works'.

Direct Line's Brand Mental Network



Source
Ipsos MORI
R&D April 2019

Base
N=1,903.
sole or joint decision maker for financial products.
Currently hold either home or motor insurance.
Aware of Direct Line.

Ipsos MORI has developed ways to capture Brand Mental Networks, and Direct Line's exposes all of the elements that we see as critical to successful brands.

The Brand Mental Network reveals:

Distinctive Associations

Associations uniquely attributed to Direct Line, the iconic brand symbol of the red telephone and their long-held position of not being available on price comparison sites.

Choice Primers

Critical choice primers such as 'reliable', 'solid' and 'well known'; fundamental to creating a sense that they are a safe choice in this category.

Campaign Associations

'The Fixer' campaign's dominant presence reflects Direct Line's sustained investment over time. This has ensured that the brand has many relevant, lively and distinctive advertising associations, helping the brand to remain salient in an exceptionally cluttered category.

Brand Proposition

The brand proposition has been embedded effectively, too. We see strong value associations, as much about fairness and customer centricity as they are about price. This is testament to the refocus from price and cover at the point of purchase to performance at the time of need.

Nurture the Mental Network and fight back

Successful brand building requires you to build dense, connected, distinctive and relevant associations which prime people to think of you first. Direct Line has succeeded because it recognised that if you want to reap rewards in the long term, there is no substitute for committed investment in brand building activity and consistently strong creative content.

Let us hope the ‘crisis in creativity’ will abate in 2020. It’s great to see brands such as Adidas acknowledge that it focused too much on efficiency at the expense of effectiveness. They admit they fell into the trap of over-investing in performance marketing at the expense of brand building. They are now on a journey to rectify that balance and recognise the true impact of creating brand desire.

Our New Year’s message: nurture your brand’s Mental Network among the public and watch it grow in 2020.

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Three in four (73%) think that Britain is already feeling the effects of climate change, up from 41% in 2010[vii]

Gender equality – a shared responsibility

BY LUCY THOMPSON
Marketing Manager

Gender equality stayed in the news in 2019 – but female representation in senior jobs and the gender pay gap showed little sign of improvement. There are some signs for optimism about progress. In our work for International Women's Day this year and for Julia Gillard at the Global Institute for Women's Leadership we found that attitudes to collective action and shared responsibility are changing.

Most British men agree that women won't achieve equality unless they also take action to support them (60%). While a third (29%) of British men say they are expected to

Men may fear that the empowerment of women will mean them losing out, so it is important to broadcast that equality benefits us all

do too much to support women's equality, more than half (57%) disagree.[31]

Attitudes towards masculinity and gender roles are changing too, which benefits both women and men. Childcare is no longer seen as the preserve of women, with 75% of people globally disagreeing that a man who stays at home to look after his children is 'less of a man'.

Close to half (48%) of us believe that not enough is being done to achieve equality between men and women. It remains a widespread belief in many parts of the world that housework is women's work. A recent study in the US found that married mothers still do almost twice as much of the housework and childcare than married fathers,[32] often while maintaining a full-time job. Men must start to acknowledge and take action to share the day-to-day household management in order to reduce the burden on women's shoulders. That means not just the cleaning and washing, but the organising, planning, gift-buying, dressing … the 'mental load' goes on.

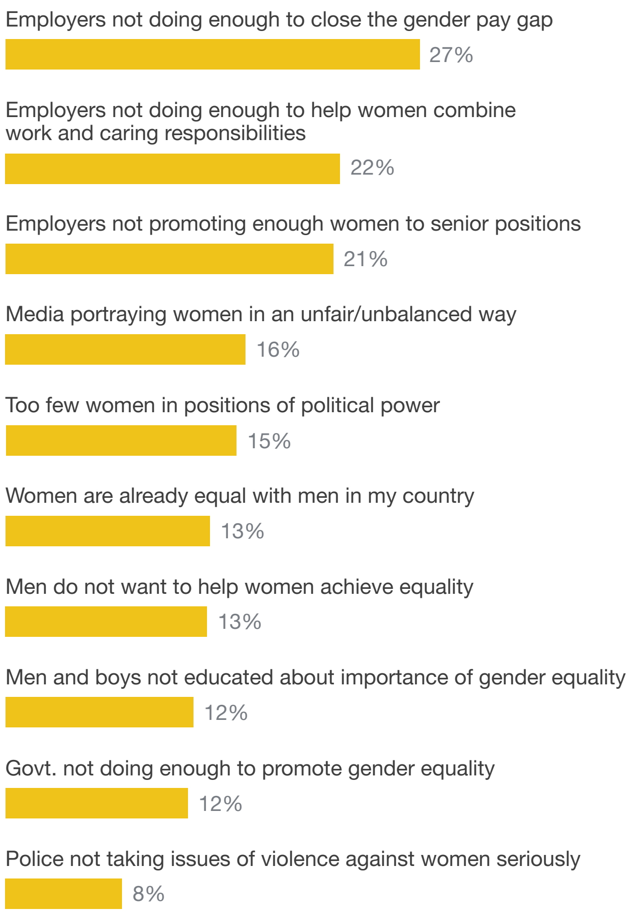
Men also continue to dominate positions of power – positions they would have to give up in order to achieve parity. Some 46% believe more must be done to improve equal rights between men and women in business. Forty-four per cent say the same for government and politics. Much of this comes down to the visible absence of women as experts, CEOs and politicians, which reinforces inequality; generations of young women are less likely to feel their aspirations for success are possible without role models to guide them. We can challenge this by asking "where are all the women?", but men must do their part to enable women the opportunity. Simple things like insisting on gender balanced shortlists for senior roles can make a big difference.

It is also about changing the narrative, and there is an argument that this begins in the home. A recent study shows that only 38% of heterosexual families where the woman outearns her husband thought the term 'breadwinner' was an appropriate label for the woman.[33] One possible explanation for this is an unwillingness to break the norms of engrained gender expectations. Men often fear that the empowerment of women will mean them losing out, so it is important to broadcast that equality benefits us all. The distribution of care and domestic tasks in the home encourages more satisfying and happy relationships.

Employers still have a lot to do – our November study revealed several double standards around the world; people are more likely to say intelligence is important for women to get ahead (28%) than for men (20%), and that never giving up is key (25% for women versus 16% for men). By contrast, personal networks are considered more important for men's success. Globally, 22% say being connected is key for men, compared with 13% who say the same for women. And 18% say political connections are particularly important for men, versus 8% for women.

Employers get most of the blame for preventing equality

Which two or three of the following, if any, do you think have been the most important factors in stopping women from achieving equality with men in Great Britain?
% mentions of each factor (Top 10)



Source
Ipsos MORI/ The Global Institute for Women's Leadership

Base
Approx. 1,000 GB online adults aged 16-74 across 27 countries, 20 September – 4 October 2019

This year's data may not yet be just cause to celebrate, but globally, people are most confident that, in 20 years, discrimination against women will have ended in education (47% think so) and science and technology (44%). However, our research shows that resilience alone will not enable women to achieve equality with men – they need positive action. According to the British public, the three greatest barriers are employers not doing enough to close the gender pay gap (27%), a lack of employer support for women in balancing work and care responsibilities (22%) and employers not promoting women to senior positions (21%).

While men agree theoretically with the importance of equality, they're less enthusiastic when it comes to concrete changes. Some 72% of people globally – women and men – want employers to make it easier to combine childcare with work. As the '#BalanceforBetter' theme for International Women's Day this year encapsulates, shared responsibility is better for balance, better for all of us.[34] And none of this can be achieved without the support of men.

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2020: the year of the streaming services?

BY NICK COOK
Senior Research Executive

With the recent launch of Apple TV+, BritBox (the new service that will feature content from the BBC, ITV, Channel 4 and Channel 5) and the imminent launch of Disney+, is the future of TV about to move online?

UK audiences are about to be faced with even more choice about what they watch, where they watch, and when they watch TV. Over the past five years the appetite for streaming services has been gradually increasing. In 2014, just under 4 million households subscribed to a subscription video on demand (SVOD) service, in 2019 that grew to more than 13 million.[35]

Just under half (49%) of us now use either Netflix or Amazon Prime Video, and almost a quarter (23%) use both services

Today, just under half (49%) of us use either Netflix or Amazon Prime Video,[36] and almost a quarter of us (23%) use both services.

While these subscription figures outweigh most of the British broadcasters online, with only 24% using ITV Hub and 12% using All4, watching live TV is still the most popular, with 99% of us watching TV or video each week.[37]

So, with the market fracturing across services and splitting audiences, what can new and existing SVOD services do to capture subscribers, retain audiences, and compete with traditional TV viewing? As the market leader, with around 11.5 million households subscribing, there are some interesting lessons to be learned from Netflix's success.[38]

TV is king

Given the continued popularity of the TV set, smart TVs are a valuable opportunity for SVOD providers. With 37% of the British public owning a smart TV,[39] it is a clever tactic by Netflix and Amazon Prime Video to secure buttons on many remote controls. Their presence on the TV remote engrains their prominence in our minds.

Think local

Audiences respond well to content providers who champion British talent, as well as committing to representing social and regional diversity in the UK. Earlier in 2019, Netflix announced that it would be spending an additional £400 million on UK-made films and TV programmes, in an apparent bid to continue to appeal to UK audiences.

Classics and crowd pleasers

Nostalgia has been a key trend in the west for the last decade and Netflix has been successfully capitalising on it. Rebooting previously popular shows such as Queer Eye and platforming former TV staples such as Friends has seen TV ‘classics’ regain social relevance, pleasing viewers that watched it the first time round and engaging new viewers who are only familiar with the content second-hand.

This may be an area where competitors such as BritBox have an edge, having a large back catalogue of BBC, ITV, Channel 4 and Channel 5 programmes to draw from (such as The Office, Gavin and Stacey, and Benidorm). As some of this content currently sits on Netflix, the move to the homegrown service might come as a blow. Not to mention Disney, which has been pulling its Marvel and animated movies from other SVOD services ahead of the launch of Disney+ in November 2020.

Fans and franchises

As streaming services become more common, Netflix has already seen its membership growth slow. Where Disney+ has Star Wars and Marvel as large franchises to commercialise, Netflix is increasingly trying to monetise content such as Stranger Things outside of its platform, with commercial tricks such as the sale of t-shirts in high street retailers, figurines and product placements to boost revenue.

Meme-ability

Despite some users finding their tweets ‘creepy’, Netflix’s habit of tweeting interesting facts about its content and viewing figures has helped to drive conversations. When Netflix US tweeted: “To the 53 people who’ve watched A Christmas Prince every day for the past 18 days: Who hurt you?” at the end of 2017 it encouraged a spike in views for the movie. Similarly, when it released Bird Box in 2018, the memes surrounding the movie were almost as popular as the content itself. Regardless of its critical reception, by creating content that is discussed and dissected on social media, Netflix can harness its user base to drive new subscriptions.

The bottom line? As the number of services increase, we will have even more distraction, even more content to choose from, and we may feel even more overwhelmed by choice in 2020.

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A third of Britons think the British economy will be worse off than other European countries in the next year – 23% think it will be better[viii]

The Trump phenomenon

BY CLIFFORD YOUNG
President, US Public Affairs

President Trump's re-election chances should be in dire straits – impeachment is not usually a good look. But people shouldn't get ahead of themselves by reading too much into the tea leaves.

The truth is that structural factors are the most important determinants of presidential electoral outcomes: the economy, his approval ratings, his incumbency, among other factors. There are vast amounts of literature demonstrating this. Trump is in a strong, if not dominant position, given his metrics. He is still as positively regarded

Sprinkle in a series of exaggerated (and headline grabbing) comments and a supportive media ecosystem and we then have Trump's almost superhuman ability to shape the national agenda

as Obama was at this point in his presidency, because of how polarised American votes now are.

One overlooked factor in Trump's ultimate electability or demise is his savant-like ability to drive the agenda.

Let's look at immigration as a national priority. Put simply, Trump took an issue that had never commanded much focus and brought it to America's attention.

He achieved this by tapping into underlying grievances and concerns about immigration and connecting them to a running series of events illustrating the 'danger' posed by immigrants. Sprinkle in a series of exaggerated (and headline grabbing) comments and a supportive media ecosystem and we then have Trump's almost superhuman ability to shape the national agenda.

But Trump's superpower appears to have gone somewhat dormant in late 2019.

Since late summer, and particularly since the impeachment inquiry formally launched, the percentage of Americans registering immigration as the main issue facing the country has dropped precipitously.

The rise of concern about immigration in America

In your opinion, what is the most important problem facing the US today? % saying immigration

13% Travel ban

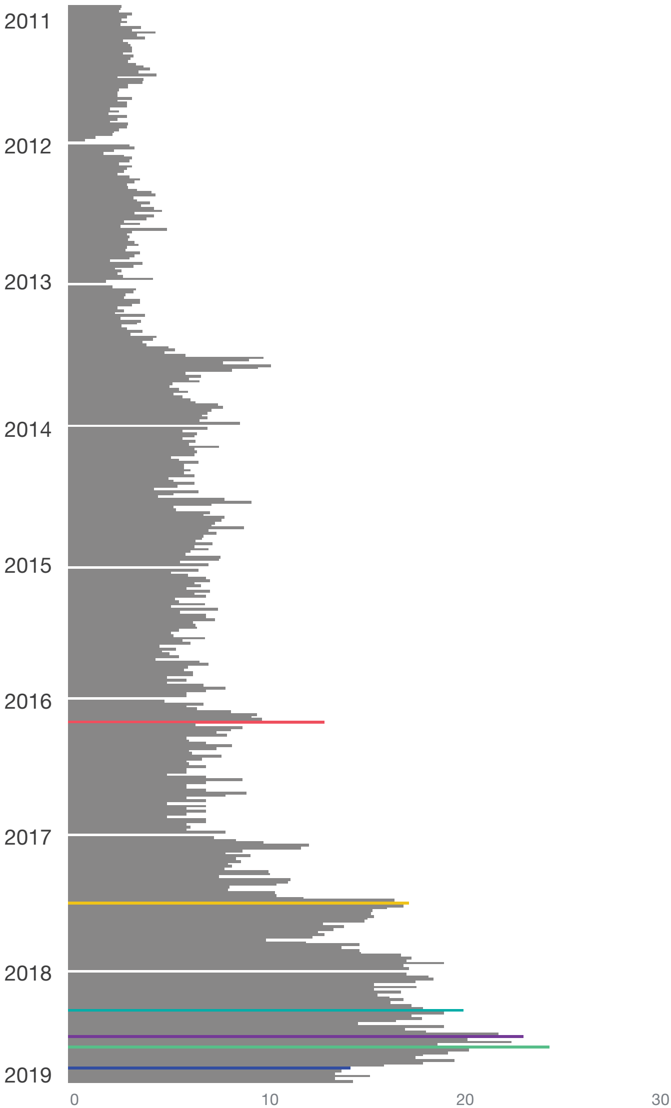
17% Family separation

20% Asylum and detention order by Attorney General William Barr

23% Trump vows mass immigration arrests

24% Trump racist tweets about 'The Squad'

14% Nancy Pelosi announces formal im-peachment inquiry

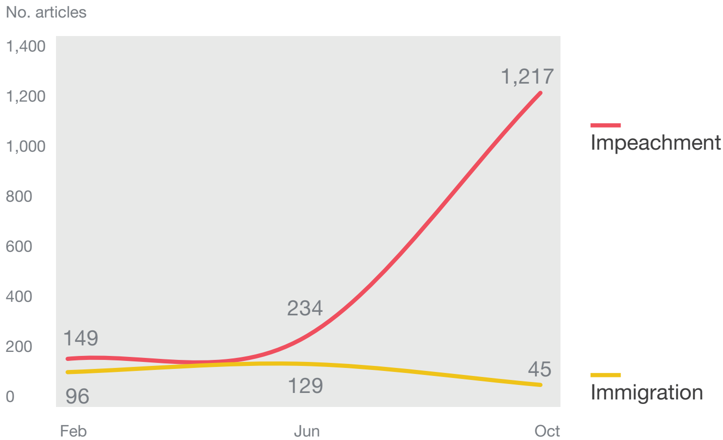


Source
Ipsos/Reuters Poll 2012-2019

Base
c1,000 US adults 18+

Fox News mentions

Number of articles containing ‘immigration’ or ‘impeachment’



Source
www.foxnews.com

Has Trump lost his superpowers?

The underlying fundamentals have not changed. Migrant detention camps still operate along the southern border, bans on refugees are still in effect, and the ‘Squad’ (the nickname for four progressive lawmakers whom Trump recently targeted on Twitter) are still in Washington. Yet President Trump has been distracted from this once prominent issue. The possibility of impeachment has drowned out other signature issues for Trump, including immigration.

Fox News, a reliable mirror of Trumpian priorities, also pivoted away from a focus on immigration as the impeachment inquiry gains steam. A dramatic spike in mentions of the word ‘impeachment’ on FoxNews.com occurred around the same time that we see a decline in mentions of the word ‘immigration’.

The possibility of impeachment has drowned out other signature issues for Trump, including immigration

From these numbers, we can see how easily Trump influences the national dialogue. His ability to keep his base focused on issues such as immigration has been key to energising his Republican base.

Looking forward, what should we expect?

It is still the case that structural factors, and his dedicated base of support put Trump in a solid position, where his odds of winning re-election in 2020 should be about 50/50.

People should not underestimate Trump's ability to shift the agenda to be more favourable to him. Ultimately, the key for Trump will be his ability to refocus his attention on those issues, such as immigration, that resonate with his supporters. In contrast, the Democrats need to prolong the impeachment process for as long as possible. This might be the only way to staunch Trump's 'superpower'.

Our advice? Buckle up for Trump's second-term, with all that implies for global political instability for the next few years.

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WORLD'S
BEST
COFFEE

Keeping promises: customer experience in 2019

BY FIONA MOSS
Research Director

In theory, all the new channels we have for contacting companies should make us happier with customer service. But for customer experience practitioners, it has made the job of delivering a functionally and emotionally fulfilling experience which delivers on a 'brand promise' inestimably harder.

These days, not only do you need to ensure that every part of your business unites to deliver a good experience, you also need to ensure they meet your customers' expectations of what 'good' is. British businesses do not excel here. Only 27% of Britain's 'Captains of Industry' rate their *own* organisation as good at understanding their customers' needs.[40]

However, brand promises need not be complicated. The least a customer can expect from their bank is to be able to access their money, but TSB's major IT glitch in 2018 made that impossible. It then didn't fix it quickly enough – or apologise – and the CEO was forced to step down. The saga cost the bank £330 million in total, and customer churn was up 60% on the year before – a huge dent to its brand credibility.

Then, in November 2019, the bank was struck by another calamity when an IT error meant incoming payments weren't processed, leaving thousands of customers unable to pay rent, bills and other outgoings. On the day, some customers even received automatic warning messages from the bank saying that they needed to pay in additional funds to meet the expenditures, or face a penalty.

This time, however, TSB resolved it quickly and apologised both publicly and profusely. The full financial and churn impact at the time of going to press is still unknown, but it is clear the reputational damage has been done, again. Indeed, to have one catastrophic IT failure may be regarded as a misfortune; to have two looks like carelessness.

This shows how misalignment between the actual experience and the brand promise has the potential to seriously damage customer-supplier relationships. In recent R&D, we found that 17% of people who felt 'unfairly' treated because of the experience being worse than the promise.[41]

A sense of unfairness is just the tip of the iceberg when there is a promise-experience misalignment, though. When we look at customers who say their experience is worse than or unrelated to the brand promise, they are less likely to be emotionally connected to their supplier than others. Their resultant key performance indicators, the likes of Net Promoter Score (NPS), satisfaction, likelihood to continue using, etc. are also lower.

This should be enough to make businesses sit up and consider how they can unite brand experience and messaging so that they positively reinforce one another.

The bad news doesn't stop at key metrics for organisations who fail to align the promise and the experience. Ipsos found a tangible impact on the bottom line of these businesses both in terms of increased volumes of complaints handling and potential lost customers. We estimate almost 10,000 lost customers across a customer base of 750,000 if just 14% report that their experience is worse than the brand promise.

What does this tell us? Well, it serves as a reminder that good customer experience delivery is not just about performance or operational metrics, it's also about understanding customer expectations, how they are formed, and how to meet them along the customer journey. This is no easy task, and for many organisations it requires closer collaboration of brand and customer experience teams than ever before.

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RGROUND

How big is Britain?

BY BEN MARSHALL
Research Director

The answer is 209,331 km2, 80,823 miles2, but more interesting perhaps is how big, or small, our islands feel. Physical geography matters, but so too do our perceptions of space and distance.

Think how often you, or someone else, says “oh no, that’s too far” or “it takes ages” about a visit to a relative or friend, a weekend away, a new house or job. The mental map we have of Britain and the ease or difficulty of getting around it can be life-changing.

What is that mental map? We've found that many of us struggle with basic British geography, and tend to overestimate how long it takes to get between some of our biggest cities, especially by train. In effect, this makes Britain feel bigger than it actually is.

We asked people to tell us the straight line distance between ten pairs of British cities. The average guesses were quite close to reality. For example, people guessed an average 93.2 miles for Newcastle to Edinburgh, compared to the actual figure of 91.4 miles. On average, across all ten pairs of cities, people are 16 miles out or, put another way, they are wrong by 15%.

That's pretty impressive. While our 'Perils of Perception' studies have found that Britons have a pretty warped view of our country – being mistaken on everything from the size of the current Muslim population to voter turnout and crime, even our sex lives – we are much better at geographic distance.

People are even better at guessing the time it takes to travel by car between the same pairs of cities, but less accurate when it comes to train travel. We collected guesses for the duration of the fastest direct train journey between the cities and the average error was 16%.

Such distortions are evident in cartograms which use perceived distances and journey times to relocate the ten cities. For the most part, our cartograms show an enlarged country, particularly in the far north-west. The group with the most experience of train travel are less accurate than the public as a whole and their equivalent road users.

As with parents being less accurate about the cost of bringing up children, is this likely to be a case of emotional innumeracy, of train users recalling their poor experiences

People are better at guessing the time it takes to travel by car between the same pairs of cities, but less accurate when it comes to train travel

Cartogram showing 'regular' users who travel on motorways/A-roads or take the train for journeys of 60 minutes or more – once a week or more often

Regular road users
(motorways/A-roads)
(n=423)

Regular train users
(n=104)

Cartogram city location

Source
Ipsos MORI

Base
Cartograms based on data from an online survey of 2,233 UK adults aged 16-75

and unconsciously fitting their answers to these frames? Possibly. Echoing this, we asked a different question – about the average door-to-door single-trip commute time – a reality rather than a timetable, and the public were again wildly out.

We found an appetite for faster, more reliable inter-city transport, and a willingness to commute further for the right opportunity

This might suggest that our transport system is better than people think, but other research finds a nationwide recognition that our economy and its infrastructure is unbalanced and tilted towards the south of England. We've also found an appetite for faster, more reliable inter-city transport, and a willingness to commute further for the right opportunity.

The potential here is to bring jobs, housing, social opportunities and people closer to each other – in effect, to make Britain smaller and better connected. If successful, this has the potential to change our spatial perceptions – the way we see geography, distance and time – thereby lifting our personal and national horizons.

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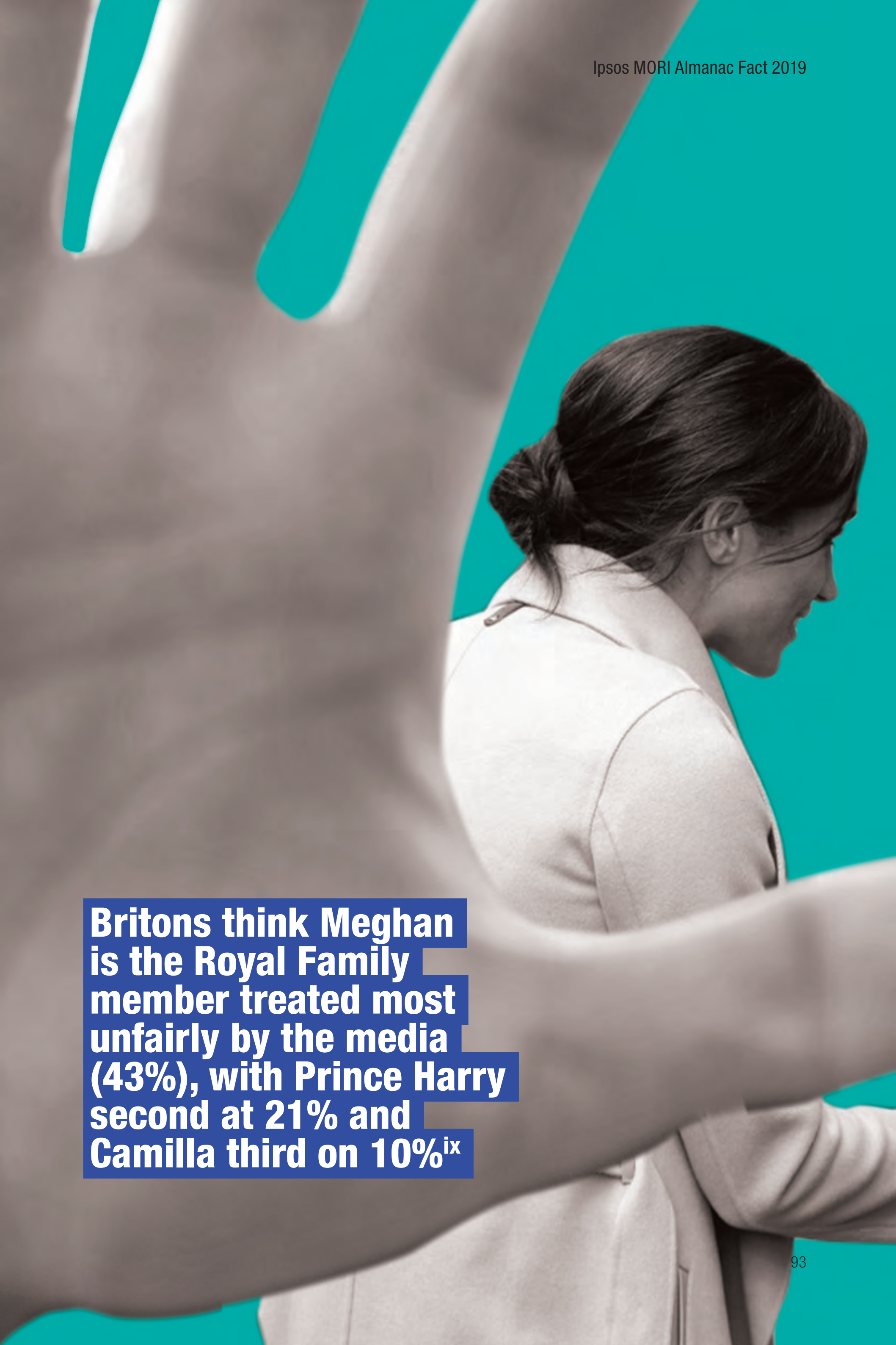


Britons think Meghan is the Royal Family member treated most unfairly by the media (43%), with Prince Harry second at 21% and Camilla third on 10%[ix]

Clear as mud – where does our social data go?

BY TARA BEARD-KNOWLAND
Head of Social Intelligence

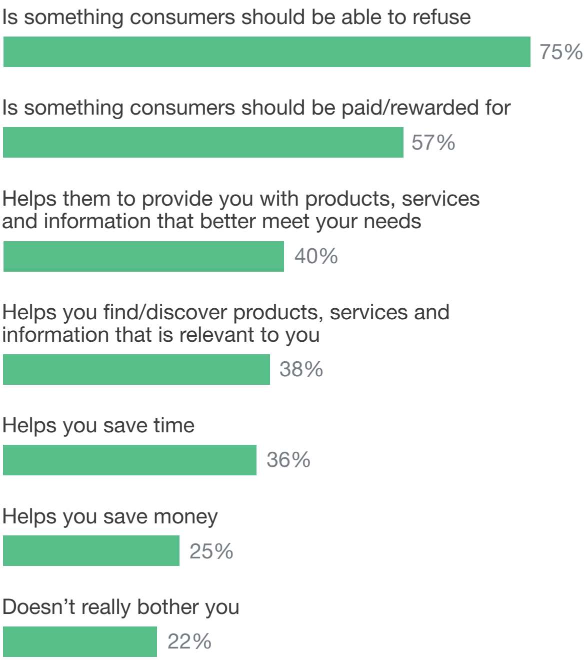
SOPHIE WILSON
Associate Director

Young people now spend at least 24 hours a week looking at screens.[42] Many of the rest of us are also addicted.

But what this looks and feels like in reality is changing fast. Online culture is becoming more social, more virtual and more visual every day. The rapid rise of TikTok and Fortnite are just two examples of the quickly changing face of the online world. Things move so fast it can feel hard to keep up. But we've also seen a backlash against this constant acceleration, as links are increasingly made between too much screen time and offline wellbeing. Despite calls for a

The British public think they should have the right to refuse

Allowing companies to use data they collect about you ... % agree or strongly agree



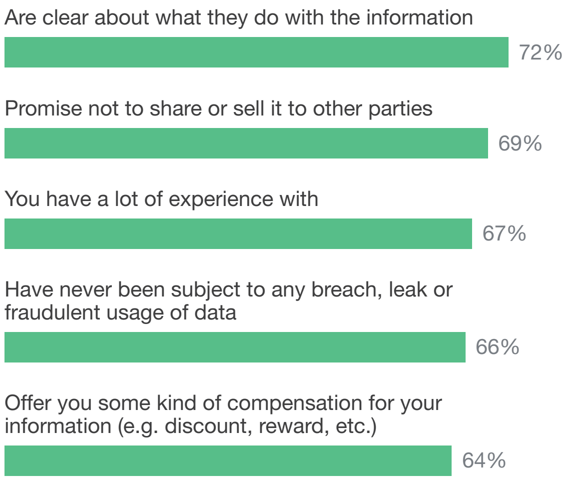
Source
Ipsos and World Economic Forum, October/November 2018

digital detox, 72% of Britons claim to post at least once a month on some type of social media platform[43] and most say they can’t imagine life without the internet.[44] It is no surprise then that what happens in these online spaces is becoming a big topic of conversation – for users, regulators and the platforms themselves.

What is now in play is the relationship between users, their data, and how social media platforms make money. Increasingly, people are waking up to the value exchange

Companies should be clear about what they do with the British public's data

To what extent would you be more comfortable about sharing personal information with companies or brands that ... % agree or strongly agree



Source
Ipsos and World Economic Forum, October/November 2018

being made every time you visit a website or share a post on social media. But awareness of how this happens, where the data goes, and how you can limit it, remains low. Although this is key to the social media business model, only 21% of Britons say they're willing to trade sharing their data for personalisation.[45] More than half (57%) feel that they should be paid or rewarded in some other way.[46]

Does this mean the days of social media giants might be coming to an end? We doubt it. Although there is resistance to data exchange, the reality of switching off means many won't take the plunge. We want the benefits of keeping connected with friends and family who may be dotted all over the world, as well as the constant free news and entertainment. But calls for change shouldn't be ignored. Seventy-five per cent of online British adults think that consumers should be able to refuse companies the right to collect data about them. Demands centre on the need for greater transparency and control. People want to know they can genuinely opt out of sharing their data, or at least have a choice about whether they do so or not. Options should be easy to understand, using clear language to explain what is happening to data and how this relates to the service a user receives. Some 72% say they would feel more comfortable sharing their information if companies and brands were clear on how it would be used. But safeguarding data, and being trusted to do so, is also critical to achieving that kind of openness.[47]

Building these relationships will be key to maintaining loyalty in an increasingly competitive market. It will also reassure regulators that consumers are being protected from harm and are providing genuine consent for the use of their data, not just clicking 'yes' to get to a website. This is especially the case given nearly two-thirds of British adults are concerned about their online privacy and 75% say consumers should be able to refuse companies the right to use the data they gather about you.[48]

Right now, how organisations use our data is clear as mud. The opportunity is to build relationships by making it crystal clear. In 2020, expect more and more cries for greater regulation of the online world.

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Three in ten people (28%) say that selfish parking and noise are what they least like about their neighbours[x]

Perennials: the golden years?

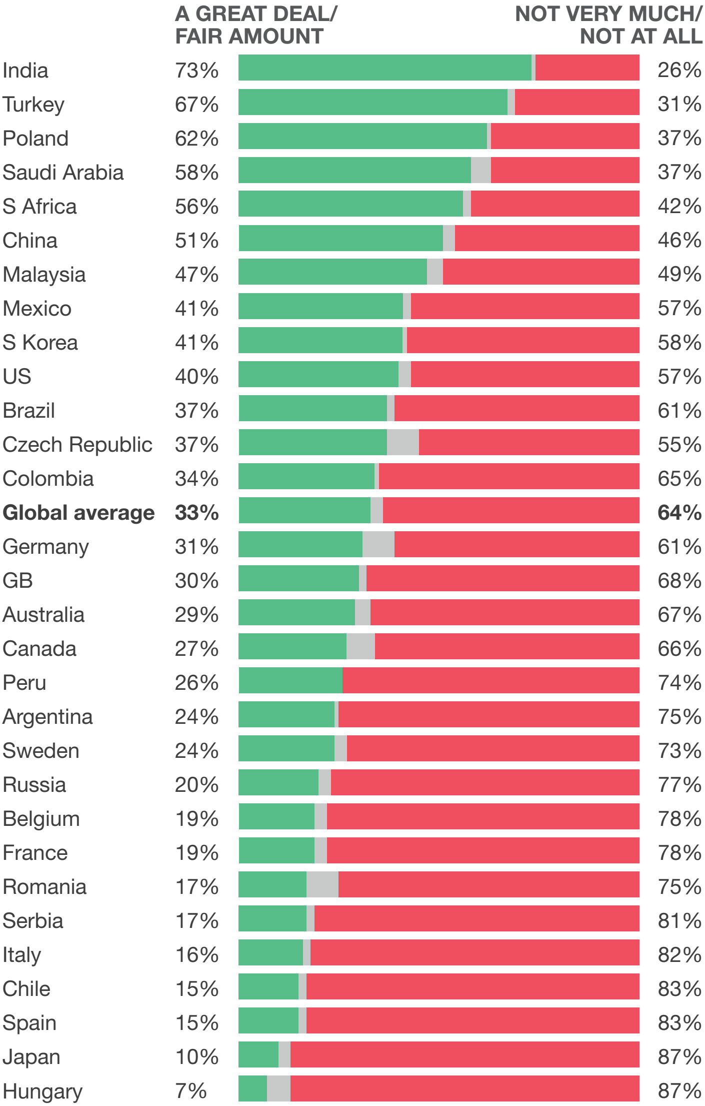
BY SUZANNE HALL
Research Director

A common thread that runs through so much of our work is that things are better than we think they are. Whether we're thinking about crime rates, levels of unemployment or the rates of immigration, our perceptions are not in line with reality. The same is true when it comes to our later life; globally, only a third of us are looking forward to our old age.

These figures start to make some sense when you dig into what people's expectations of old age are. What should be our golden years are perceived as a time of uncertainty and decline. While people appreciate that there are good

Only a third say they are looking forward to their old age

% who are looking forward to old age



Source
Ipsos Global Advisor

Base
20,788 adults aged 16-64 in 30 countries, online, 24 August – 7 September 2018

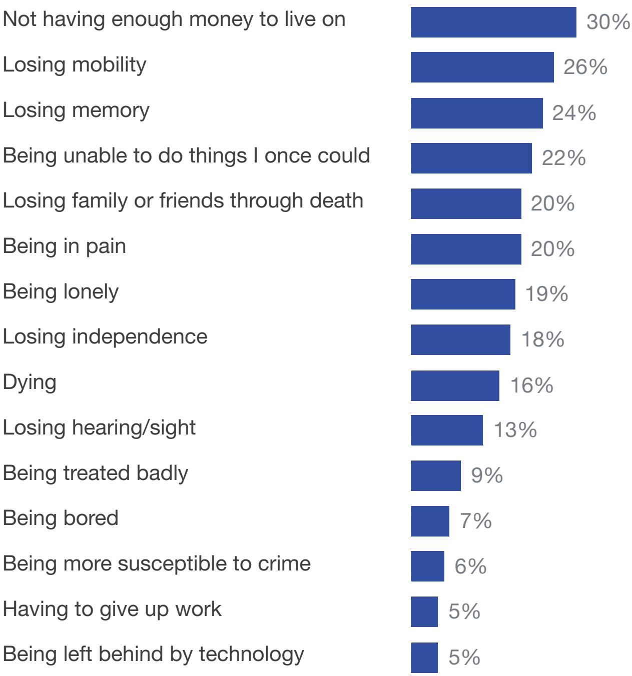
things that come from having more time available – like being able to spend it with family and friends (36%), on hobbies and leisure (32%) and on holidays and travel (26%) – they identify a number of downsides too. Chief among these are not having enough money to live on (30%), losing mobility (26%), losing memory (24%) and being unable to do the things we once could (22%).

But what is the reality? While there are, of course, always exceptions, the data available paints a much more positive picture of later life than the one we typically imagine. Most western studies show that people in later life are some of the happiest in society. Data from the Office for National Statistics depicts lifetime happiness figures as being like a shallow bowl; after a dip in our 40s and 50s (when we're busy looking after kids, and our own ageing parents while also working) happiness creeps up, with levels of personal wellbeing in our mid-60s to mid-70s very positive indeed.[49]

That said, loneliness is a real issue, and is highlighted as a concern by one in five (19%). In the UK, a third (32%) of all those aged 65 and over live alone, and most of these (70%) are women.[50] This is partly to do with life expectancy differentials – women live longer than men – but it is also down to the rise of the 'silver splicer'. While in the UK divorce rates are down overall, older people are bucking the trend. From 2005-15, the number of men aged 65+ who divorced went up by 23 percentage points and women by 38 percentage points.[51] There are a number of hypotheses as to why – from the increased economic empowerment and independence of women, through to rising longevity prompting panicked assessments about whether another thirty years with the same person is really what happy ever after means.

Getting older means worries about money and health

Which two or three things personally worry you about getting old? % mention (Top 15)



Source
Ipsos Global Advisor

Base
20,788 adults aged 16-64 across 30 countries, online, 24 August – 7 September 2018

But even if divorce rates are on the up, it doesn't mean that people in later life are giving up on love, or sex. US data shows that two in five (40%) of those aged 65-80 are sexually active, and two-thirds are interested in sex. Across the pond, around half (52%) of us aged 65+ feel that we do not have enough sex. For those who are having sex; a report by the former Chief Medical Officer showed that prevalence of STIs in people aged between 50 and 70 has risen by more than a third in the last decade, a pattern we can see repeated in the US.[52]

Older people are also more connected than we perhaps give them credit for. Yes, there's a gap – and of the 4.8 million people in the UK who have never used the internet, 3.8 million of them are aged over 65 – but it is closing.[53] What's more, we find that across a variety of measures people in later life are more likely to be techno-optimists – particularly when compared to younger generations. For instance, globally, more of those aged 16-24 agree about the threat of technology than those aged 60-64 (53% vs 44%).[54]

If nothing else, people in later life certainly have more money. Pensioner poverty remains a scourge – in the UK, 16% of pensioners live in poverty – but this is not the whole story.[55] Here, the over-50s account for around 47% of all UK consumer spending,[56] helped by increases in their disposable income; from 2008-18, the median disposable income for retired households increased by £3,200 per annum, compared to just £900 for those in work.[57]

These misperceptions matter. They prevent us from engaging with and planning for our later life – making it more likely our worst fears about it will be realised – but they also mean that older people are underserved; by governments who don't design policies to meet their needs, and brands who don't cater for the lives they actually lead. We all need to stop thinking about the ageing population as a challenge and, instead, as an opportunity and a privilege.

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Packaging rebellion?

BY ALEX BAVERSTOCK
Head of Product and Packaging

For many, the amount of waste we produce is on a par with global warming and climate change as an issue of environmental importance,[58] despite not having a Greta Thunberg-esque figure to spearhead awareness and activism.

Images of littered single-use plastic were unfairly attributed to recent Extinction Rebellion protests, in some corners prompting stronger responses than to the potential death of our planet.[59] With that level of consumer concern, it's no surprise that the packaging of consumer

Tesco and Waitrose both made national news for the introduction of 'packaging-free' trials in selected stores

goods – and the waste as a result – continued to receive notable media attention in 2019.

Tesco and Waitrose both made national news for the introduction of 'packaging-free' trials in selected stores, with shoppers able to bring their own reusable containers to stock up on cereals, pasta, and even beer and wine.[60] Despite these being in only a handful of stores, more than one-third (36%) of the UK public say they are aware of 'stores trialling packaging-free' initiatives', while six in ten (61%) say they would consider using them if they were available close to where they live.[61]

As well as initiatives to reduce the amount of packaging in their own-brand products, supermarkets have announced plans to 'encourage' product manufacturers to reduce the amount of unnecessary or hard-to-recycle packaging that appears on their shelves. Similarly, e-commerce giant Amazon saw the latest iteration of its 'Frustration-Free Packaging' (FFP) initiative come into force in October, penalising manufacturers of larger or heavier items if Amazon are required to use additional packaging materials for safe shipping.[62] Such actions are unsurprising when more than one-quarter of the British public (26%) say that

One-quarter (26%) of UK adults say that they would stop going to shops that use a lot of non-recyclable packaging

they would stop going to shops that use a lot of non-recyclable packaging.

The UK Government's Environment Bill[63] confirmed intentions to follow the 'polluter pays' principle and introduce legislation to ensure producers 'pay the full net cost of dealing with their packaging waste'. It also intends to implement deposit return schemes to make it 'easier for people to make the right choice when they come to dispose of products'. Despite not yet being policy across the UK – the Scottish Government unveiled a proposal that includes a 20p return value for drinks containers in May this year[64] – more than a third of people in the UK (38%) said they heard or read about a plastic bottle deposit-return scheme, and more than two-thirds (68%) said they would consider using it if available near to where they live.[65] Of course, to those of us of a certain age (or those who have lived in countries such as Sweden), the deposit-return scheme isn't a new initiative at all …

Recycling isn't a new idea now either, but work needs to be done to harmonise what is accepted across local authority schemes, and to help people better understand what can and cannot be recycled. Manufacturers

This year the Scottish Government unveiled a proposal that includes a 20p return value for drinks containers

themselves are also getting in on the act, particularly where their packaging materials are less easily recycled. Coffee chains Costa and Pret are conspicuously 'doing their bit' by accepting any brand's disposable cup for recycling at any of their stores: one-third (34%) of UK adults said they were aware of this initiative.[66]

With societal awareness and pressure, government legislation and commercial initiatives all pushing for change, we expect a lot more action in 2020. However, it is less clear whether the full complexity of some of these issues – such as the positive roles of plastic in reducing food spoilage or distribution emissions – will be fully understood and embraced. In India, vast amounts of food never even reach consumers as they spoil or get contaminated en route. In contrast, in the west, such losses are minimal, but consumers throw away 18% of all food they buy.[67] Reducing overconsumption will ultimately be as important as reducing packaging.

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20% of the British public have made no effort to decrease their plastic usage[xi]

Don't call it a comeback

BY JAMIE STINSON
Content Manager

SIMON ATKINSON
Chief Knowledge Officer

The last few years have seen a variety of political comebacks, and many politicians will be hoping for more. In 2017, Jeremy Corbyn began the election campaign at minus 40% net approval, but by the end of the campaign had leaped up to minus one per cent, giving Theresa May a bloody nose and a lost majority.

In Ireland, Leo Varadkar's satisfaction rating in May 2019 was 36%, but has recently risen to 51%. In France, President Macron saw his popularity plummet with the Gilets Jaunes protests over higher taxes, but rowing back on reform, coupled with a huge listening exercise, saw him

Never, until Boris Johnson, has a PM begun their premiership with more people dissatisfied with their performance than those satisfied

recover, with his ratings returning to 36% satisfied in 2019, far ahead of those recorded by Mr Hollande during his later period as President.

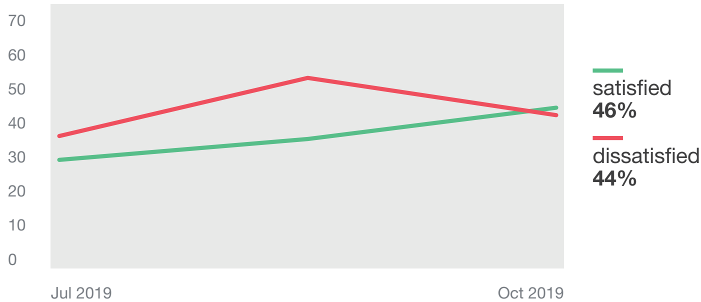
Britain's new Prime Minister had his own Lazarus moment in the autumn. In July, he was the first occupant of Number 10 to start their tenure with satisfaction ratings in the red. When he took office, Boris Johnson registered a first net satisfaction rating of -7,[68] which then fell even further to -18 in September.[69] Never, since Ipsos MORI started tracking public satisfaction with leaders in the days of Margaret Thatcher, had a PM begun their premiership with more people dissatisfied with their performance than those satisfied.

However, what a difference a month made. By October, the Prime Minister's satisfaction rating had rocketed into the black, posting a figure of +2.[70] Boris Johnson therefore went into the election campaign as the *only* leader of the four main political parties for people to be more satisfied with their performance than not, even if it was pretty weak compared to some of his predecessors.

Going into the General Election 46% of the British public were satisfied with the PM

Are you satisfied or dissatisfied with the way Boris Johnson is doing his job as Prime Minister?

July – October 2019



Source
Ipsos MORI Political Monitor

Base
c.1,000 British adults each month

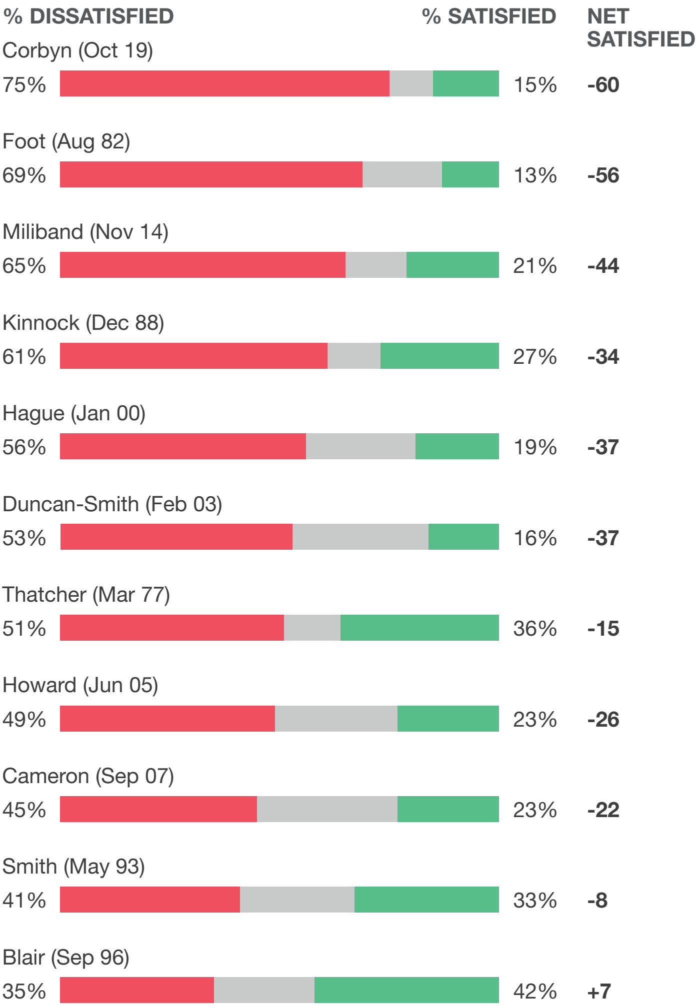
By contrast, at the start of the 2019 campaign, Jeremy Corbyn's net satisfaction rating had fallen to a new low of -60.[71] Only 15% were satisfied with the job he was doing and more than three in four (75%) were dissatisfied. Never has a leader of the two main UK parties had such a low net satisfaction rating, plummeting below even Michael Foot's nadir.[72]

At the time of going to press, Jeremy Corbyn has only marginally improved his position. Maybe you can't be Lazarus twice?

The reader will be able to make their own assessment as to how strong a comeback the Labour leader will be able to make this time around.

Jeremy Corbyn has experienced the worst ratings of any Leader of the Opposition since our records began

How satisfied or dissatisfied are you with the way … is doing his job as leader of the … Party? Worst score each received during their time as Leader of the Opposition



Source
Ipsos MORI Political Monitor

Base
c.1,000 British adults each month

Despite his unpopularity in Britain and Europe, one person who has done rather better is Donald Trump

Despite his unpopularity in Britain and Europe, one person who has done rather better than these leaders is Donald Trump. As discussed earlier in Cliff's article (on page 78), the US President's approval rating has hovered around 40% for the last two and a half years, which suggests he has – barring impeachment and other upheavals – a good chance of re-election.[73] He is now achieving the same type of rating President Obama achieved at this point in his first presidency.

So, while it can be easy to write off our political leaders, no matter how unlikely, comebacks can happen – and fast.

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Batteries and barriers – a transport revolution

BY JIM NEEDELL
Chief Client Officer

CHRIS MATTHEWS
Senior Client Director

October this year saw a new record for electric vehicles, with 10% of cars sold either battery-powered or hybrid cars, up from just 3% a year earlier. When will we hit 50%? That will depend on infrastructure, but also our attitudes.

Our research shows 60% of the population know little about electric vehicles, rising to three-quarters[74] when we ask about self-driving autonomous vehicles. As with many things, a lack of knowledge can breed caution. Indeed, there are widespread anxieties about autonomous vehicles. Almost half of us (46%) claim to be anxious about self-driving cars becoming a reality.[75] Just 10% claim to be 'very comfortable' with the idea of autonomous driving[76] – a figure not dissimilar to those who say they'd be comfortable leaving their elderly relatives' care to a robot, or having a robot conduct minor surgery on them. In some ways, so far, so normal. Humans are generally worried about new technology – be it steam engines, the printing press, or the car, all of which have triggered legislation to control them and protect jobs and people's safety.

So, psychologically, we may have some way to go to convince consumers to fully let go of their wheel.

> **Self-driving cars could cut accidents by 90%, possibly shrinking the car insurance sector to 40% of its current size by 2040**[77]

In theory, self-driving cars could cut accidents by 90%, saving many thousands of lives a year. But as with many technological leaps, disasters tend to make bigger headlines than small advances. Take, for example, the 2018 case of Elaine Herzberg, killed by an autonomous Uber vehicle while pushing her bike across the road, because it didn't recognise her as a hazard.

While current government policy (such as pollution and congestion charges, tax incentives, liability laws) can continue to nudge consumer psyche in the direction of electric vehicles, the real challenge lies in how quickly it can deliver the necessary infrastructure across the whole country. To really push the electric uprising in the UK to reach the levels of Norway,[78] an exemplar country for uptake, will require significantly greater public spending.

The new technology will have an impact on other industries, too. There are a wealth of threats and

The real challenge lies in how quickly the government can deliver the necessary infrastructure for electric vehicles across the country

opportunities for brands, some of which are already starting to present themselves. Thirty per cent of consumers in London now use delivery apps instead of eating out, preferring to log in rather than drive to make a 7pm dinner reservation. Meanwhile, those who do choose to drive – or, rather, be driven – present a new audience and a new channel for marketers, through in-vehicle media.

The combined force of technology and consumer desire is rarely overcome. So, with a concentrated push behind infrastructure policy, and a healthy dose of technological trust for consumers, the mobility revolution might not be that far away after all.

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Can advertising shape culture to benefit society and brands?

BY ELEANOR THORNTON-FIRKIN
Head of Creative Excellence

> **Because, in the end, we are changed by what we see. Just as we are changed when we are seen.**

In early 2019, Trevor McDonald spoke these words in a campaign highlighting moments from ITV's history that influenced British Culture. Changing or the shaping of culture is at the heart of what many ad agencies claim as their mission for clients. This isn't altruism on their part; the purpose of advertising is to sell their clients' products. But can advertising also be a force for good in speeding up positive societal change? And can it still deliver growth for clients while doing so?

Over the last couple of years there has been a focus on diversity in advertising. Of all the areas of inclusion, gender equality is the one that has had most time and effort spent on it in 2019. From empowering women to detoxifying men, it has occupied much of the advertising space on our screens. Which is just as well, given the data from our Global Trends Survey shows three-quarters of people in the UK do not agree that the role of women in society is to be good mothers and wives; the same number of people agree that men now have greater responsibility for the home and childcare than ever before.

Cutting-edge marketing

But you can't make an omelette without breaking eggs. This holds true for advertising. 2019 kicked off with the 'We Believe: The Best Men Can Be' ad from Gillette, which took a firm stance on the need for a modern definition of what it means to be a man. Unsurprisingly, it had a big impact. Within days it had more than one million dislikes on the brand's official YouTube channel, while our analysis of social media sentiment showed 36% negative reactions versus just 16% positive.[79]

However, when we tested the ad among a broad sample of the US population, we also saw that the controversy had driven long-term desire for the brand. This positive appreciation of a brand trying to change culture for good has prevailed, with Gillette's CEO, Gary Coombe claiming it as a commercial success, particularly with its target audience of millennial men.[80]

While sexism is slowly being attacked by positive portrayals, there is another ism that persists in advertising – ageism

That's why Dad's gone to Iceland, too

There is now additional regulatory pressure for brands, too. As mentioned in Imogen's earlier article (see page 50) the Advertising Standards Authority (ASA) rules introduced in June 2019 mean adverts "depicting gender stereotypes likely to cause harm or serious or widespread offence" are banned. VW and Philadelphia are two brands who have already fallen foul of this new stricture, for presenting men as more adventurous than women, and depicting men as hapless dads.[81]

While sexism is slowly being attacked by positive portrayals, there is another ism that persists in advertising – ageism. It's not just the portrayal of all over-50s as one amorphous group, but the lazy targeting that takes you in your early 40s from constant pregnancy test ads on YouTube, straight into banner ads online for stairlifts by the time you are 50. Given Europe's over-50s would be the third-richest country on earth if they were a sovereign nation – and have lots of years left in them to spend it, they should be a prime, well-understood target for both marketers and agencies. So, why no dice?

Part of the reason is clearly the lack of representation and familiarity of this group within agencies and clients. With just 6% of ad agency people over 50 years old[82] versus 37% in the general population, there is an immediate problem with visibility. On top of this, there remains an obsession with youth and a tacit but outdated belief that, if you get them young, you shape their relationship with the brand forever. All of which means that there is less time and energy expended on understanding the disparate lives and needs of the over-50s.

While of course you don't need to be over-50 to come up with a marketing plan or write an ad for this audience, you do need to have empathy and knowledge to do it well. The signs are there that if a brand makes the effort it will be rewarded, with 88% agreeing that brands should focus on needs and interests, not age.[83]

Advertising will continue to shape our culture – hopefully for the benefit of both brands and society. To do this, agencies and marketers still need to make real effort to see people not only for who they are, but for who they could be. In short, our advice is play to interests, values and aspirations, not demographics.

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One in seven (13%) people in the UK said they would use a form of transport with a lower carbon footprint than air travel, even if it were less convenient or more expensive[xii]


NHS
Hospital

There's more to the NHS than bricks and mortar

BY KATE DUXBURY
Research Director

2019 was the second year in a row that Conservative Prime Ministers made significant announcements about NHS funding. Following Theresa May's 70th birthday present to the NHS in 2018, Boris Johnson pledged an additional £3 billion capital investment plan to rebuild hospitals and replace diagnostic equipment.

This additional funding is of course very welcome within the NHS given recent low capital investment, although some previously promised capital funding has struggled to make it to the frontline.

This is a good political move on the Prime Minister's part. We have frequently reported on the NHS as a national treasure (87% think the NHS is 'a good thing'). While healthcare and the NHS are changing, the public has a deep connection to 'hospitals' as a symbol of the NHS and its ability to take care of us when we need it. This capital funding announcement really taps into those sentiments.

The announcement reflects the public's wish for more funding for the NHS, with four in five thinking it is underfunded. After the Prime Minister's first announcement of capital funding in August, 54% welcomed the money, but thought that more was needed, while 33% said the NHS requires a lot more money. Will the latest announcement, accompanied by photographs of Boris Johnson next to state-of-the-art scanners, be enough to swing voters towards thinking the Conservatives are investing enough in the NHS?

The focus on building hospitals reinforces traditional views of the NHS as associated with bricks and mortar and reflects current public opinion. For example, if the Government were to devote more funding to health and care services, the public's top priority would be urgent and emergency care such as A&E and ambulance services (68%).

But if we want a financially sustainable and modern NHS, we need to change our relationship with it.

One area identified in future plans for the NHS is to encourage the provision of care outside of local hospitals – in the community or in more specialist centres. The public appear open to this approach, at least hypothetically. Eighty-six per cent say they would be prepared to travel further than their local hospital to a specialist centre for

Nearly all of us (82%) now think that mental and physical health are equally important

serious health issues. Some 67% of the public think they would receive the same standard of care in a local GP practice as in a hospital if they needed minor surgery. However, as anyone who has tried to move services out of local district hospitals knows, the hypothetical responses are very different to the emotional response from a community when they feel NHS bricks and mortar are threatened.

The health service also faces challenges in its perceived focus only on physical illness. Mental health is now one of the top public health concerns. Nearly all of us now think that mental and physical health are equally important (82%), yet only 20% think mental and physical health are currently treated equally in our healthcare system, and spending patterns reflect that. This dissonance is not only prevalent at a national policy level, but at an individual level. Although we claim that mental and physical health are equally important, 72% of us say we often think about our own physical wellbeing, but only 57% say we often think about our own mental wellbeing.

As the NHS faces increasing demand for mental health services and budgets continue to be strained, technology

63%

say they would be willing to use a video consultation with their GP for advice on a minor ailment

brings huge opportunities for the future around access to services. While new ways of interacting with healthcare professionals are seen as acceptable for some issues (for example, 63% say they would be willing to use a video consultation with their GP for advice on a minor ailment), this approach is less acceptable for others (acceptance falls to 55% for those seeking advice on an ongoing problem or condition). When thinking about how these technologies could ease the pressure on services, it is important to remember that millions of NHS users are excluded from online solutions.

While the Prime Minister’s funding announcements will certainly be welcomed and are a relief for those working within the NHS sites receiving funding, they do little to remodel the public’s relationship with the NHS. That is the big challenge for the 2020s – to build and accept a 21st century health service that relies less on local hospitals, treats mental and physical health equally, and makes use of new technology. Though I doubt the PM will mind if the public associate him with enhancing the bricks and mortar of the NHS.

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Just one in five (20%) Britons think the health system prioritises mental health to the same extent as physical health[xiii]

Don't have a cow, man

BY RUTH TOWNEND
Research Manager

Meat and dairy consumption are marbled through British culture like the fat in a good T-bone. Over 60% of the UK's agricultural output comes from livestock, with dairy and beef making up the bulk of this.[84] These foods are staples of our diets. But for how much longer, when it's clear we're harming the planet for the sake of a steak?

Sixty-two per cent of Britons say they are worried enough about climate change to change their lifestyle or urge the Government to act.[85] In 2019, 31% of Britons rated 'eating a plant-based diet' as one of the three most important factors in reducing individuals’ greenhouse gas emissions.[86]

Our research found that around half of Britons (49%) would eat a plant-based substitute for meat, only slightly more than the average worldwide (42%).[87] Generally, though, people in Britain (80%) and worldwide (75%) would prefer to have animal products as part of their diet.

Scientific consensus suggests that eating a lot of meat and dairy products is unsustainable: for our personal health, the worldwide population, and the climate.

But changing minds won’t be easy. In August, Goldsmiths University caused a media storm when they banned beef in campus food outlets in the name of sustainability.[88] British farmers responded with frustration,[89] pointing out that not all burgers are created equal when it comes to carbon emissions. Grass-fed British beef has a lower impact than intensively farmed, soy-fed beef and, in some cases, less impact than a bar of chocolate.

The fact remains, however, that a portion of the highest impact vegetable protein emits less than a portion of the lowest impact animal protein. Climate-wise, beans beat beef and lentils lick liver, hands down.[90] Awareness of this fact is growing fast, yet while the profile of veganism has grown massively in recent years,[91] in 2016 we found just 1% of the British public self-identify as vegan.

“But what of the Greggs vegan sausage roll?” I hear you cry. True: businesses are beginning to respond to this ‘delicious but disastrous’ conundrum. In 2018, the UK launched more vegan products than any other nation,[92] with some of these products falling under the futuristic heading of ‘meat analogues’, a category that includes everything from the familiar (Quorn™) to the strange

The public overestimate the impact of recycling and underestimate the impact of flying, and of having children

From this list of options, which three do you think would most reduce an individual's greenhouse gas emissions?

		ACTUAL RANK	CO_2 TONNES SAVED
Recycling as much as possible	52%	7 ▼	0.2
Living car free	42%	2	2.4
Eating a plant-based diet	31%	5 ▼	0.8
Replacing a typical car with a hybrid	29%	6 ▼	1.1
Buying green energy	27%	4 ▲	1.5
Avoiding one transatlantic flight	25%	3 ▲	1.6
Having one fewer child	21%	1 ▲	58.6*
Hang-drying their clothes	19%	8	0.2
Replacing lightbulbs	8%	9	0.1
Don't know/none of these	8%		

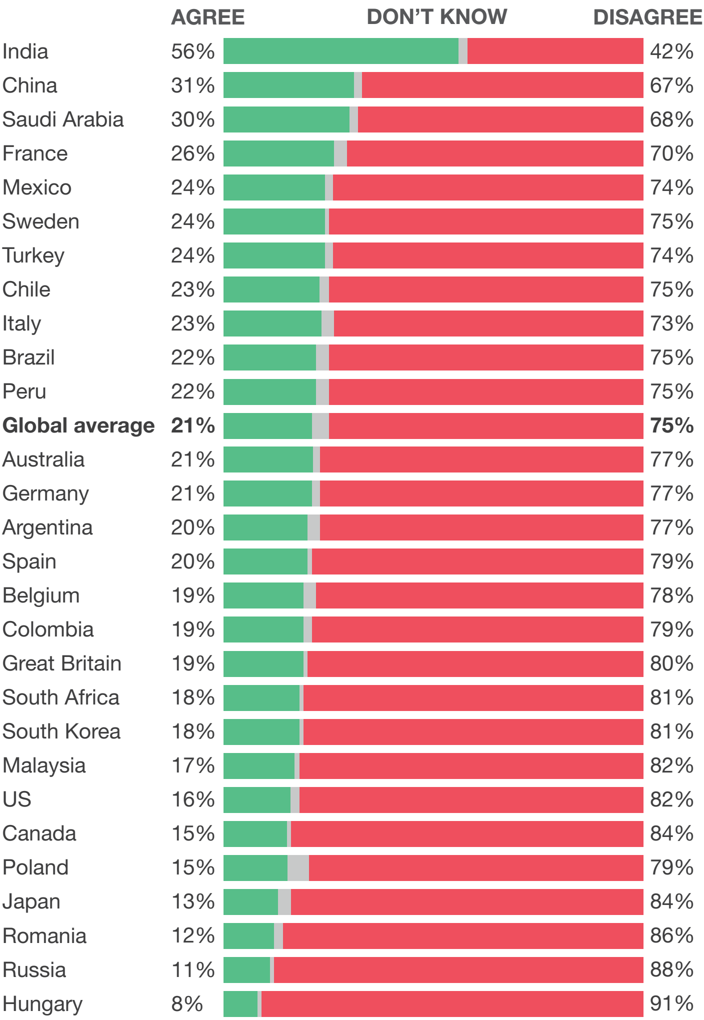
*This is calculated by quantifying future emissions of descendants based on historical rates, based on heredity. Source: Institute of Physics, 'The most effective individual steps to tackle climate change aren't being discussed', July 2017

Source
Ipsos MORI and The Policy Institute, King's College London

Base
1,084 online interviews with British public aged 16-75, August 2019

Globally, people would still prefer a diet that includes some type of meat

To what extent do you agree or disagree with the following statement? – I prefer to not eat any type of meat, poultry, or fish



Source
Ipsos Global Advisor

Base
14,502 online adults aged 16-64 across 29 countries, August – September 2018

(plant-based burgers that bleed ‘real’ blood).[93] But while tofu is increasingly on the table, meat analogues aren’t necessarily to everyone’s taste.

A more palatable answer, then, is simply ensuring that we actually eat the food we buy. Britons waste an estimated 156kg of food per person every year.[94] By reducing the amount we waste, we could keep eating the same foods and still lessen our climate impact.

There is no silver bullet that will help us put our mouths where our morals are when it comes to meat and dairy. But, through moderation in all things, increasing vegan choices as part of flexible, meat and dairy reducing diets, by buying local, less but better-quality, and eating everything we buy, we can continue to support farmers. Through trying new things, we can support innovators to please our palates, without leaving a bad taste in anyone’s mouth.

One thing is for certain, however. For these changes to stick, we all need to feel excitement about a new food future. Maligning meat, demonising dairy, and villainising vegans[95] won’t provide the answers we urgently need.

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A turbulent year for the Royals

BY HANNAH MILLARD
Head of Media Relations

In turbulent times, many Britons see the monarchy as something enduring and providing stability. Over half of us see it as something we can be proud of. While Brexit has dominated the headlines in 2019, the private lives of the Royals have given it a run for its money.

The Royals have had their fair share of headlines this year, most recently with the scandal surrounding Prince Andrew's friendship with Jeffrey Epstein, but also focus being put on Prince Harry and his wife the Duchess of Sussex, known to many as Meghan Markle.

Three in ten Britons say that the Royals are an expense we cannot afford, while nearly half (43%) of us disagree

The tabloids led the charge in their critique of Harry's new wife, and legal intervention by the couple came in response. Perhaps the Duchess will take some solace in knowing that, according to new Ipsos MORI polling, nearly half the British public (43%) think she is the most unfairly treated Royal by the media.

One of the many media stories about the couple this year was the exposé about the cost of their renovations at Frogmore Cottage – reported to have cost £2.4 million of public funds. The media went to town on the expenditure, encouraging uproar during a period of austerity.

The Queen may, however, be interested to see that our research shows there is continued support for the expense of the monarchy, with just three in ten Britons saying that the Royals are an expense we cannot afford, while nearly half (43%) of us disagree. That said, just one in ten Britons can accurately guess the cost of the annual Sovereign Grant, with the majority guessing lower than the £82 million figure granted in 2019.

A more pressing issue for the Royal Family is the media storm surrounding Prince Andrew. As we go to press he has stepped back from royal duties, but our long-term trends suggest that the family has weathered many a storm in the past and it looks likely this one (although it may shake the foundations) will also pass – or be limited to the reputational damage of an individual, rather than that of the institution of the Monarchy as a whole.

When millions are being spent on renovating properties, and potential scandals appearing in their private lives, the Royals have to work hard to offset this with their PR and charitable activities. So, which of the Royals is balancing this best in 2019?

The work of the younger Royals has been part of a massive shift in Britain in normalising discussions about mental health, as they discussed their feelings after losing their mother. Public awareness and concern has doubled since their intervention, and the Government has pledged more resources.

Despite media attention around his spending since his engagement, Prince Harry is seen as the most in touch with the ordinary man or woman on the street, according to 32% of us. Followed by the Duchess of Cambridge, Kate Middleton (28%), cited for her Halloween shopping in Tesco and rewearing her high street wardrobe.

Only one in ten people view the Queen as in touch with the masses, but then how many 93-year-olds are? And, whether it's true or not, it does little to impact our feelings about her, as she remains the most popular Royal.

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Actions speak louder than hashtags

BY MAËLYS BABLON
Senior Research Executive

It's been two years since Alyssa Milano's incendiary tweet calling on women to voice their experiences of sexual harassment through the hashtag #MeToo. While the rallying cry has entered the lexicon, what has the movement really changed?

Our recent work for the OSCE reveals the extent of sexual harassment in European countries. The survey found that on average, 45% of women have experienced some form of sexual harassment since the age of fifteen, which corresponds to more than ten million women.[96] Worryingly, it is students – generally considered society's most ‘woke’ and forward-thinking about gender equality – that are at highest risk of experiencing sexual harassment, particularly from fellow students (68% identify a peer, friend, acquaintance or neighbour as someone they have been sexually harassed by). Indeed, two-in-five (40%) say they have had at least one experience of sexual harassment in the twelve months prior to the survey.

The data also shows that sexual harassment is generally not a one-off experience. Looking at the most common forms of sexual harassment measured, women are equally likely to say that it happened to them six or more times as they are to say it happened once. This may be revealing of women’s raised awareness of what constitutes sexual harassment, and lower tolerance of things which may previously have been disregarded as ‘normal’. Like the Pandora’s box of sexual harassment, things which were previously engrained as a normal part of life are suddenly being called out for what they are.

These figures may seem distant or even irrelevant to a reader in the UK or the US. In fact, they are highly relevant, and serve as a testament to the global nature of the problem. Sexual harassment continues to be widespread in both countries, even if their respective residents underestimate just how many women it affects. When asked to provide an estimate of how many women in Britain have experienced sexual harassment since the age of 15, our average guess was 55%.[97] In reality, nearly seven in ten women in Britain (68%) say they have experienced sexual harassment.[98] Perhaps unsurprisingly, male guesses were further off. In Britain, men are 16 percentage points below the uncomfortable truth, while in the US, this gap is a little narrower, at 11 percentage points.

Women may be trying to break free from traditional gender norms but ... is it making a difference?

Reports of sexual harassment scandals at work are almost commonplace. A recent study by the French Institute of Public Opinion found that nearly six in ten women (57%) in the UK who are or have been in formal employment say they've experienced sexist behaviour or sexual harassment at work.[99] The survey suggests that such behaviour is even more prevalent in Spain and Germany, where respectively 66% and 68% of women surveyed say they have been victim to this at some point in their career. In Britain, more than one in twelve NHS staff say they were sexually harassed in the past twelve months, including being groped, upskirted, or even raped while at work.[100]

Women may be trying to break free from traditional gender norms and the value placed on their bodies and physical appearance, but is it making a difference when sexual harassment still affects women and girls on a daily basis? For meaningful societal change, men must join the battle against sexual harassment – and here are two suggestions on how to do it.

First, research shows that men who identify with the strongest beliefs of 'toxic masculinity' (for example, the belief that men must act 'strong' even when they feel

Nearly six in ten women (57%) in the UK who are or have been in formal employment say they've experienced sexist behaviour or sexual harassment at work

scared or nervous, or that men should never say no to sex), are nearly ten times as likely to have perpetrated sexual harassment than those who hold the most equitable attitudes.[101] This calls for a profound change in the values that society instils in men from a young age around what it is to 'be a man'.

Second, men do not always recognise the impact of their actions, even if the majority are committed to tackling the issue. In both the US and UK, 60% of men agree that women won't achieve equality without their support.[102] While it is reassuring to hear that both men and women are committed to creating a world where women are safe from violence and harassment, male actions speak louder than hashtags.

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Almost half of Britons (45%) would send Donald Trump to the moon[xiv]

Rethinking cyber security

BY JAMES STANNARD
Associate Director

2019 saw the 30th birthday of the World Wide Web. It is still an incredibly new technology, and its full impact will not be clear for decades. In the 100 years after the invention of the printing press in 1450, there was massive social upheaval: we might expect the same now; we are still at the beginning of an equivalent era.

The advent of election meddling, AI, large-scale cyber-attacks and mass surveillance has given us pause for thought. We're at a pivotal moment where the line between offline and online is becoming blurred and we're

There's a lack of consensus across the tech industry on how to behave securely online

starting to question the vulnerabilities of a hyper-digital world.

Eight in ten Britons (80%) say cybersecurity is a high priority for them personally. This is good news for the UK Government, which faces the challenge of engaging the public 'to help make the UK the safest place to live and work online'.[103]

When it comes to knowledge of how to be secure online, the picture is less positive. Just 15% of Britons say they know much about how to protect themselves from harmful activity online. Three in ten (30%) say they know not very much or nothing at all. But this isn't necessarily their fault. There's a lack of consensus across the tech industry on how to behave securely online, with different companies adopting different standards, language and advice. This is reflected in the survey findings with almost half of respondents (46%) agreeing that most information about how to be secure online is confusing.

There's also a sense of inevitability when it comes to cybercrime, with seven in ten (70%) saying they will likely be a victim of at least one specific type of cybercrime over the next two years, and most feel it would have a big personal impact. When asked specifically about losing money or personal details over the internet, around four in ten (37%) agree that it's unavoidable these days.

We know people see cybersecurity as a high priority and they're concerned but they're not that knowledgeable. So how well are people actually protecting themselves online and what can we learn from it? It's worth noting here that being cyber-secure isn't as simple as it sounds – it involves many different behaviours across different services, apps and devices. Our findings show the most prevalent behaviour is using a pin/passcode to unlock smartphones or tablets, with seven in ten Britons 'always' doing this (70%). This looks like a positive finding, but it's not necessarily because we're actively engaging with the behaviour. We know that in recent years automatic passcodes have increasingly become a default setting on our smartphones and tablets, and our findings highlight an important lesson for policymakers and technology companies.

When asked what interventions would be most likely to encourage cyber-secure behaviour, around nine in ten (86%) say IT providers and platforms building in automatic security measures would be best.

Tech overlords take note – we all want an easy life – and as our attention spans diminish and our screen time rockets, we want to be secure by default.

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Why businesses are finally focussing on social outcomes

BY KATHERINE SHIPTON
Associate Director

The glaciers are melting, the rainforests are burning and Extinction Rebellion is causing trouble for London commuters.

We might be carrying around reusable cups, drinking more oat milk and attempting to cut out some plastics, but, as the Guardian uncovered in its exposé in October this year, analysis by the Climate Accountability Institute shows that 20 companies alone contribute 35% of all energy-related carbon dioxide and methane worldwide, totalling 480 billion tonnes of carbon dioxide (and equivalent) since

1965.[104] Discerning consumers, however, might just have got their message across…

In August this year, the BRT (a US thinktank of CEOs from the Fortune 500) reissued its mission statement. Moving away from focussing purely on the needs of shareholders towards the concerns of a wider group, including consumers, employees, the community and the environment.[105] While public opinion trends have pointed to this for a while, there appears to have been an unmistakable shift in the blurring of citizens and consumers, and this change in the BRT reflects the growing pressure on businesses to do more than increase stock prices.

Our data reinforces this idea and shows that consumers are making decisions about their product and brand purchases dependent on shared values and greater societal purpose. Our analysis of more than 9,000 customer interactions across nine sectors helps us identify the key ingredients to strong relationships between companies and their customers.[106]

Forty per cent of customers agree that they want to share the same values as the company that they are buying from, and this rises to nearly half (49%) of those interacting with hotel booking sites, 46% with supermarkets and 45% with banks. We can see that those who feel they have shared values are more likely to recommend or have a higher emotional connection with the company.

With the rise of climate consciousness among consumers, it is no surprise that businesses are responding.

Age also has an impact here. The highest recorded feeling of needing to share values with the company you purchase

40%

of customers agree that they want to share the same values as the company that they are buying from

from is at age 20, with a clear trend showing declining agreement with this discerning consumption over our lifetime. Does this reference a Gen Z 'woke'ness, or is it representative of how the young have always spent their money? Our work on Millennials indicates that sustainable spending is unlikely to be dependent on your generation (cohort), and is much more likely a feature of age (life stage),[107] although are we witnessing a change in the tide?

In a recent interview with WARC, P&G's Marc Pritchard emphasises brands' growing need to build in 'citizenship'.[108] While the outcome is surely the right one, it is worth remembering that this is not all philanthropic. As Pritchard notes: "[Culturally relevant programmes] get amplified by influencers, they get amplified by the media, they get amplified in social media. They ended up having an even higher ROI, in some cases, because you don't have to invest as much."[109] Capitalism may yet embrace the truly circular economy – with enough regulation.

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COME ON IN

Less nimby, more maybe

BY BEN MARSHALL
Research Director

Nimbyism (ˈnɪmbɪˌɪzəm) **NOUN**

not-in-my-back-yard-ism

the practice of objecting to something that will affect one or take place in one's locality

We British love our scenery and countryside – it's the thing we say that makes us feel proudest as a nation, along with the NHS and a few other institutions such as the armed forces. But we need to build – the vast majority of us agree there's a housing crisis. The Government has a goal of 300,000 new homes each year,[110] there are numerous nationally significant infrastructure projects (NSIPs) in the pipeline and both Labour and the Conservatives are announcing further huge infrastructure investment.

But will nimbyism get in the way? On first sight, no. In a survey earlier this year we found 52% support the building of new homes locally, up from 40% five years ago.[111] Nimbyism, it seems, is in retreat.

Public support for local home building increases if it is affordable, social housing and if any necessary new infrastructure is built at the same time.[112] This underlines the conditional nature of opinion, evident in the public being keen for infrastructure to be delivered in a manner which 'protects' as well as 'progresses'. The public are swayed by the aesthetics of housing developments[113] and, in London, its height (people there take a pretty dim view of tall towers), as well as the outcomes and impacts it has.

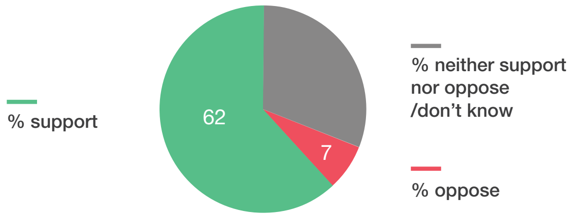
According to this year's Global Infrastructure Index, supported by the Global Infrastructure Investor Association, the British are supportive of the local building of infrastructure – including housing, transport, digital and energy – by a margin of 62% to 7%.[114]

As with publics across 27 other countries, Britons warm and cool towards building depending on different factors. These have such an impact that levels of support range from 20% to 78%, as shown opposite.

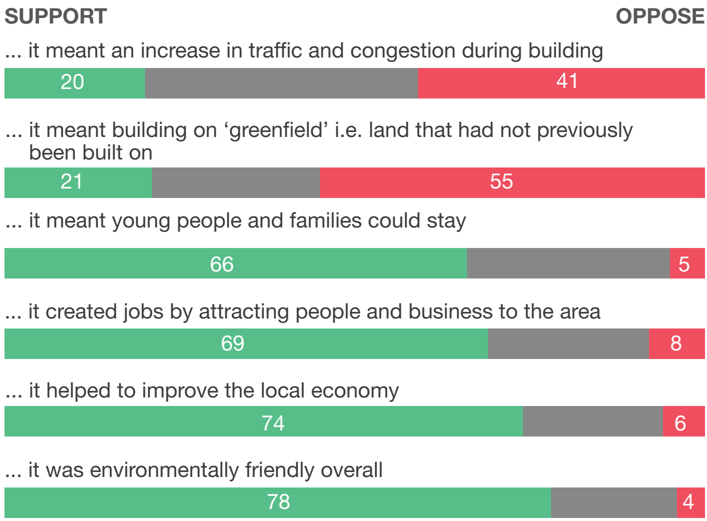
While Britain is a relatively more sceptical country – ranking 21st out of 28 in terms of in-principle support for building – we're as high as fifth if the infrastructure is environmentally friendly overall, but bottom of all 28 countries if building means an increase in traffic and

'Nimbyism' ... it depends

To what extent do you support or oppose, in principle, the building of new infrastructure in your local area?



To what extent would you support or oppose it being built if ...?



Source
Ipsos/ GIIA - Global Infrastructure Index 2019

Base
1,002 GB adults among 19,786 adults, online, August – September 2019

congestion, and involves 'greenfield' i.e. land that had not previously been built on.

Another important factor is the type of infrastructure. We asked about new housing, new roads and new rail, and found global support for housing greater than that for road, then rail. In Britain, the gap between support for housing and other sorts of new development is a little wider, with rail ahead of road in the popularity stakes.

What does all this mean? A better description than nimby, or yimby, is that the British are probably more ‘maybe’. This survey, and our new ‘Nimby Index’ provides insight into the British cultural context, and how we differ from other countries in our attitudes.

Previous Ipsos MORI research has found Britons wildly overestimate the extent to which the country is already developed, and are instinctively supportive of the ‘green belt’, despite not knowing much about it or where it is. Our imagined Britain is green and pleasant, and we are worried about overdevelopment, but also where our kids will afford to live.

Reassurance about local greenery being preserved and traffic kept under control will be important if Britain starts investing in housing and infrastructure in a major way. Currently, Britain’s infrastructure ranks eleventh in the world.[115] In 2019 our politicians have made a series of promises: we’ll see how quickly these get turned into action on the ground.

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Forty-three per cent of people say they do not want to improve their maths and numeracy skills

This is despite government data showing that half of working age adults have the numeracy level of a primary school child[xv]

Supporting older customers: it makes financial sense

BY GEORGIANA BROWN
Research Director

By 2050, the world will have more than two billion people over the age of 60.[116] Many have money: in the UK, the over-50s account for almost half of all consumer spending and ONS figures reveal that more than one in ten pensioners have a total wealth of £1 million or more.[117]

But the 'grey pound' is far from evenly spread: the richest quarter of pensioners earn three to four times more than the bottom quartile.[118] Inequality and lack of understanding are causes of concern. In financial services – a regulated, essential and often complex industry to navigate – this presents particular challenges that increasingly need to be addressed.

'Older people' – itself not the most inspiring descriptor – cannot be treated as one-size-fits-all. In consumer research, it no longer makes sense (if it ever did) to cap a survey at age 65, or to lump all those aged 65+ together for analysis. Why would it be sensible to group 65-year-olds with 85-year-olds? After all, we wouldn't dream of grouping 25-year-olds with 45-year-olds. When it comes to older people, therefore, it makes sense for brands to take a more nuanced view. There are big differences to be found – in wealth, health, attitudes, channel usage and access.

The digital divide

While it is often assumed that young people want to do everything digitally and older people are still mainly offline, this is increasingly untrue. While digital adoption is more prevalent among the young, 75% of 55-to-69-year-olds in the UK own a smartphone and 73% own a computer. This does then dip to 43% of people over 70 owning a smartphone and 62% a computer.[119] Many consumers use financial digital services and there are signs that digital will enable better financial management, with 66% of Britons agreeing that a Pensions Dashboard would make keeping track of their pensions easier.[120]

However, only 40% of 55-to-69-year-olds in the UK use online banking, and this drops to just 26% of those aged 70+. Many of these older people will have not only a preference but a need for banking in-branch. Some may face isolation, being cut off from services. If the digital advance results in further branch closures, many will face continued difficulties accessing cash and a declining personal service. Financial organisations have to keep this in mind.

The gender divide in pensions

On top of this, gender inequality is fuelling inequality in later life. As mentioned in Jessica and Stephanie's earlier article, there is a gender pension gap. In the UK, the average pension wealth of a woman of retirement age is around £35,700 – about a fifth of that of a man the same age.[121]

Vulnerability

While there is a need to move away from the stereotypical 'grey pensioner' which can be patronising and harmful, as we age, we are likely to face increasing health concerns which may stop us working and reduce our independence.

Some 60% of those aged 65+ in the UK show characteristics of potential vulnerability,[122] and being 'older old' (over 80) correlates with physical or mental impairment. One million people in the UK will have dementia by 2025, and this is predicted to increase to two million by 2050.[123]

Financial providers need to do more to support these customers and be flexible with families who may be caring for them and may need access to accounts.

No grey areas

Ultimately, it's time we stopped lumping older customers together into one 'mass'. Catering to older customers should be part of any brand's long-term strategy. With an ageing population, despite advances in digital services, it is empathy and the care provided to those most vulnerable in society that, in the end, may separate the excellent from the merely average.

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Arrivals
IMMIGRATION
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Is Britain becoming less worried about immigration?

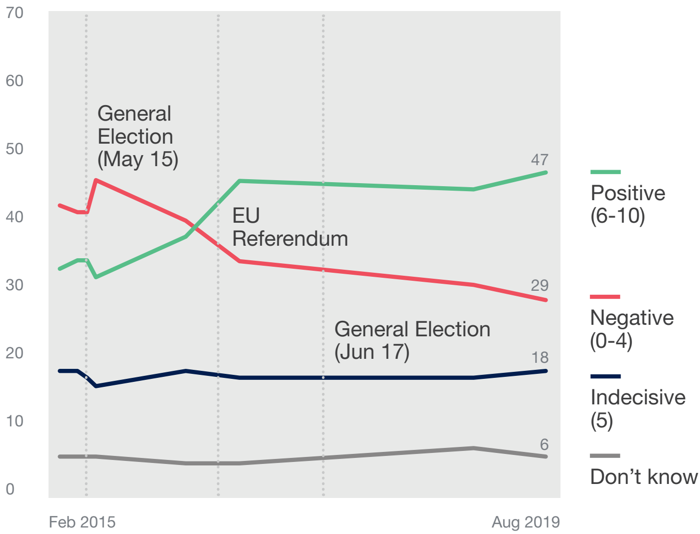
BY CHARLOTTE PEEL
Research Manager

2019 marked a major change in Government policy on immigration. The Conservatives dropped their unrealistic target of 'tens of thousands' (although they are still committed to bringing numbers down). In September, the Ipsos MORI Issues Index showed spontaneous concern about immigration at its lowest level in decades (10%). But does this represent a softening of attitudes, or even support for more relaxed immigration policies in the future?

Since 2015, we have been reviewing the views of the British public on immigration and its impact on Britain,

Perceptions of immigration's impact on Britain continue to remain positive

On a scale of 0-10, has migration had a positive or negative impact on Britain?
(0 is 'very negative', 10 is 'very positive')



Source
IMIX Immigration Survey WAVE 9 conducted by Ipsos MORI

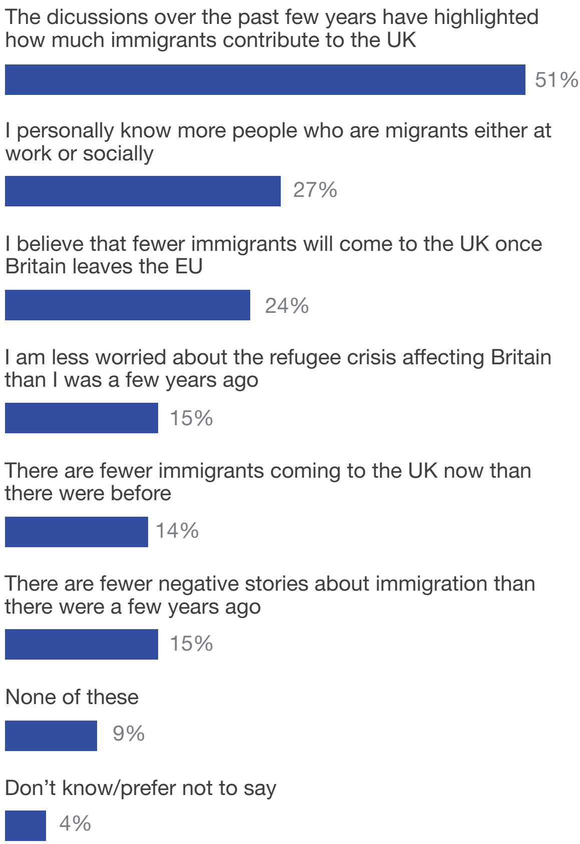
Base
All respondents (W1: 4574; W2: 3770; W3:3023; W4:2698; W6: 4002; W7: 4071; W8: 2520; W9 2006) W9: 2006 adults aged 18+ conducted online across GB. Fieldwork dates for W9: 9 – 23 August 2019

and the data shows that the public are becoming more positive. Since the vote to leave the European Union, views about whether immigration has had a positive or negative effect have inverted: in August 2019, almost half (47%) said that immigration has had a positive impact on Britain, compared to 34% in June 2015. A majority still want to see immigration reduced (54%), but this has also fallen significantly in recent months and is down from over two-thirds (67%) in early 2015.

But are attitudes really changing? As part of the same study, in December 2018 to January 2019, one in five

Of those less worried – it's mainly because they now recognise how much immigrants contribute to the UK

Which of the following reasons explain why you think that you have become more positive or less worried about the impact immigration has on Britain?



Source
IMIX Immigration Survey WAVE 8 conducted by Ipsos MORI

Base
All those who have become more positive/ less worried about the impact of immigration has on Britain at Q21 (541), respondents allowed to select more than one option, W8: 2,520 adults aged 18+ online, across GB, 17 December 2018 – 7 January 2019

people (21%) said they had become less worried or more positive about the impact immigration has had on Britain in the past few years. Upon closer examination of the people who say their views have changed, the data suggests three key reasons.

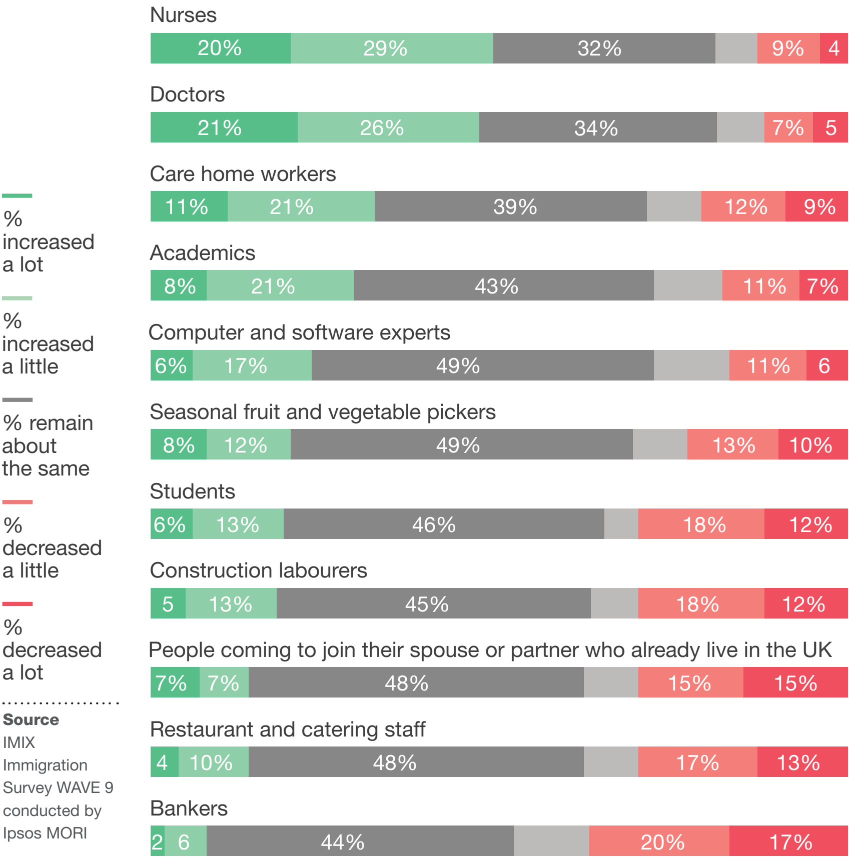
Firstly, concern is falling because there is a perception that immigration is falling or will fall in the future. Of those who stated that their views had changed, 41% were influenced by the belief that immigration will have less of an impact due to falling numbers of immigrants now or in the future. This reflects a persistent concern around numbers of immigrants arriving in Britain, and not necessarily a move towards more positive attitudes.

However, while most people state that they want to see the number of immigrants to the UK reduced, when asked about different occupations of people coming to the UK from the EU after Brexit, views are more nuanced – and most people want to see numbers of immigrants in key occupations stay the same or increase. In August, almost half of the public said they wanted to see numbers of doctors (47%) and nurses (49%) from the EU increase after Brexit, compared to 13% who would like to see numbers decrease. In comparison to 2018, there have also been significant increases in people who want to see the numbers of care home workers, students and construction labourers increase. The group of immigrants where people most want to see a decrease is bankers!

This leads us to the second reason: people in Britain are becoming increasingly aware of the contribution of immigrants. More than half (51%) of those who stated their views had changed attributed this to seeing the contribution of immigrants. These findings highlight the influence a positive narrative surrounding the contribution of immigrants has on public perception.

Britons want to increase the number of doctors, nurses and care workers coming to the UK from the EU

After Britain leaves the European Union, would you prefer the number of EU citizens from each of the below groups coming to live in the UK to be increased, reduced, or should it remain about the same?



Source
IMIX Immigration Survey WAVE 9 conducted by Ipsos MORI

Base
2,006 GB adults, 9-23 August 2019

Almost half (49%) agree that immigration enriches British culture and makes the UK a more interesting place to live, compared to a quarter who disagree.

Lastly, there is a feedback loop: as people meet more immigrants they tend to be more positive. A quarter (27%) of respondents stated that they personally know more migrants socially or through work.

It does, therefore, appear that attitudes are softening in some quarters, with people in Britain becoming more aware of the contribution immigrants can make to society. It is not yet clear whether this reflects a significant reversal of attitudes, or whether the trend will continue.

With trust in the Government's approach to immigration low (and falling – 58% of people are dissatisfied and significantly fewer (9%) state that they are satisfied compared to late last year) it may signal an appetite for a more honest conversation around immigration and its impact on Britain. It is a conversation we will need to have because immigration is fundamental to how the economy works, not least because of our ageing population. There are some signs here that the new Government may find it easier to talk about immigration in 2020.

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Five in ten Britons say they would eat a plant-based substitute for meat[xvi]


CHOOSE
LIFE

Sex, drugs and liberal attitudes

BY STEPHANIE MCCRACKEN
Marketing and Communications Manager

2019 marked a profound shift in attitudes as the UK continues to become more socially liberal. Our research with the Policy Institute at King's College London shows how attitudes have shifted since 1989. Thirty years ago, 35% said abortion was morally wrong; this number has now almost halved to 18%.

Similarly, our attitudes towards illegal drugs have softened; the number who describe the use of soft drugs such as cannabis as immoral has also halved, from 60% to 29%.

Back in 1989, 40% of the British public believed that homosexual relationships were ‘morally wrong’. Today, that number has fallen dramatically to just 13%, and it will continue to fall as the pre-1945 generation pass away. Our ‘Generations’ research supports the fact that same-sex relationships have become normalised – just two-thirds (66%) of Gen Z, born after 1995, think of themselves as exclusively heterosexual, compared to 88% of Baby Boomers. Young people have much more freedom than previous generations in many aspects of their lives as society becomes more liberal.

While the media often herald Gen Z as the ‘disruptors’ in society, it is important to note that one of the big drivers of this shift in moral attitudes is actually more liberal older groups replacing their previous cohort. While those aged 55 and above are still most likely to oppose homosexual relationships, their disapproval has fallen dramatically from 54% to a much more tolerant 18%. More liberal values appear to cross the gender as well as age gap. Thirty years ago, men were significantly more likely than women to think being gay was ‘morally wrong’, but this gap in opinion has now been virtually eliminated.

At a time when Brexit and its resulting divisions are being discussed at length, it is heartening to think that the British public are becoming more inclusive. Our politics, however, still divide us. Brexit was not just about economic arguments. It has also become symptomatic of battles over culture: how you voted in the EU referendum reflects how supportive you are of same-sex relationships. Of Remain voters, 76% strongly agree that homosexuals should be treated ‘just like other people’, while only 51% of Leave voters agree. We see a similar gap between Labour or Liberal Democrat supporters on one side and supporters of the Conservative Party and Brexit Party on the other.

Just two-thirds (66%) of Gen Z think of themselves as exclusively heterosexual, compared to 88% of Baby Boomers

It comes as no surprise then that, after we released record dissatisfaction ratings for the UK Government this year, almost half of the British public now disagree that politicians are 'good people', double the number 30 years ago.

But some things don't change. While there have been huge shifts in some moral attitudes, some concerns have endured or even increased over time. Our disapproval of capital punishment has increased since 1989, with a third or more now deeming it immoral. Meanwhile, the majority of Britons still consider having sexual relationships with someone who is married to someone else to be immoral (55%, pretty much unchanged). For the minority who regret society becoming more permissive in some areas, that at least must reassure them!

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Broken Britain?

BY BEN PAGE
Chief Executive

If the 1990s and early part of the 21st century seemed a happy time for social democracy and liberal values, the post-2008 crash world seems very different. One of the biggest shifts in my 32 years at Ipsos MORI has been the 'loss of the future' in Western Europe and North America.

Whereas in 2003 only 12% of the British thought that their children would be worse off than them, this has now risen to 45%.[124] This is a massive change, similar to the change in social attitudes towards LGBT people mentioned in the previous article. When I was born in 1965 it was illegal to be gay, now 66% say that it would be fine if Prince Harry had married a man rather than Meghan Markle.[125] We are in a completely different place.

Yet when you look at how the public in Britain and across the west are reacting to a long freeze in real wages and disposable incomes, coupled with higher immigration post-2000 and austerity in public spending post the crash, you see widespread anger at the 'elites' over the promised future that is failing to materialise. We see rising nostalgia for a remembered past, particularly among those feeling 'left behind'.

The average global citizen feels left out of the 'normal order' of life in their country:

70% agree the economy is rigged to favour the rich and powerful.

66% agree that traditional politics ignores people 'like me'.

54% agree their country's society is broken.

64% want a strong leader to 'take the country back' from the rich.

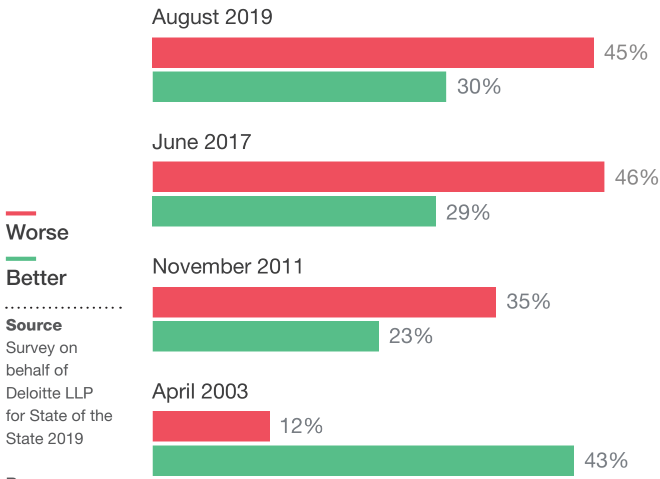
62% agree that local experts don't understand people 'like me'.

49% want a strong leader willing to break rules to fix the country.

These feelings are widespread, and in fact disaffection is most widespread in Latin America and Eastern Europe – hence massive violent protests in Chile, for example.

As in 2017, almost half (45%) feel that today's youth will have had a worse life than their parents – up from only 12% in 2003

To what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents, or will it be about the same?



Source
Survey on behalf of Deloitte LLP for State of the State 2019

Base
c.1360 UK adults

In Britain we are not immune, but in fact tend to be quite midtable – so 70% say the system is rigged for the rich and powerful, but even Sweden, a generally happy country and relatively less unequal than Britain or the US, still has 50% say the 'system is rigged'.[126] The British are in fact less keen on 'a strong leader' than France, or many other countries.

While we may be rather 'moderate' globally on many issues, and not polarising to extremes, a huge 85% of Britons think the country is divided, nine points higher than the global average across 27 countries.[127] Yet at a local level, the

A record 81% were dissatisfied with the Government this year

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. In fact, both Remain and Leave voters are equally attached to their 'local area', and to 'Great Britain'. The language used by politicians over Brexit, talking of 'traitors' and 'saboteurs', or 'citizens of nowhere' seems dramatically misplaced.

But more populist politics means we feel we are 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.[128] Britain is downbeat and critical. Some 79% per cent think the country is on the wrong track,[129] the most pessimistic country we measured, and a record 81% were dissatisfied with the Government this year.[130]

Often the challenge seems to be how we think we are, rather than how we actually are. The gap between perceived and reported happiness in Britain, as elsewhere, is huge (we think we are gloomier than we actually are). Our studies on the gap between perceptions and reality paint a picture of denial and self-delusion, combined with a dangerous focus on eye-catching scare stories. We all have an innate human tendency to think things are worse now than in the past, even when they are virtually unchanged.

The challenge is that nightly debates about Brexit, and the cultural divides behind it, as well as the inflamed debates on social media work to remind us daily of these divisions.

A corrective is that 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.[131] 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.[132]

Our challenge, when we are split over issues such as Europe, is that mixing with people and finding commonalities despite differences is harder in a 'more filtered' online world we spend a lot of time in. We are deluded about this too: in Britain, 70% think other people live in their own internet bubble, but only 30% think that they themselves do.[133]

Today, Brexit – years in the making – is media shorthand for division. It can seem like it has held up a mirror to our malaise, making it even harder to avoid the cultural equivalent of a doom loop, where division breeds division and so on and so on. But sometimes, disconnecting from the media cycle, Twitter, Facebook and just talking to people can be a healthy corrective that Britain isn't America. Ultimately there is more that unites us than divides us – even if that is not the overarching media narrative.

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- Re-using disposable items
- Buying products made from recycled materials
- Not buying goods that have non-recyclable packaging
- Not going to shops that use a lot of non-recyclable packaging
- Going to shops that have packaging-free options / sections
- Paying extra for goods without non-recyclable packaging

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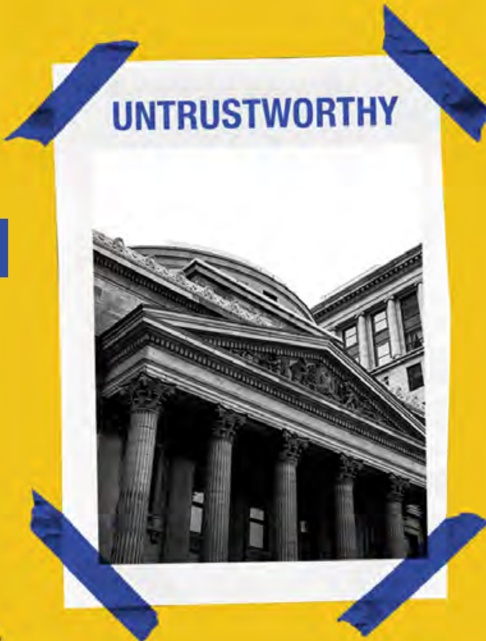

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Please let us know what you think, and what you'd like to see in future editions.

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The Ipsos MORI Almanac is our light-hearted(ish) review of life, society, business, media and politics in 2019, with contributions and data from around the business.

We hope you enjoy our 2019 Almanac.

Please let us know what you think!

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