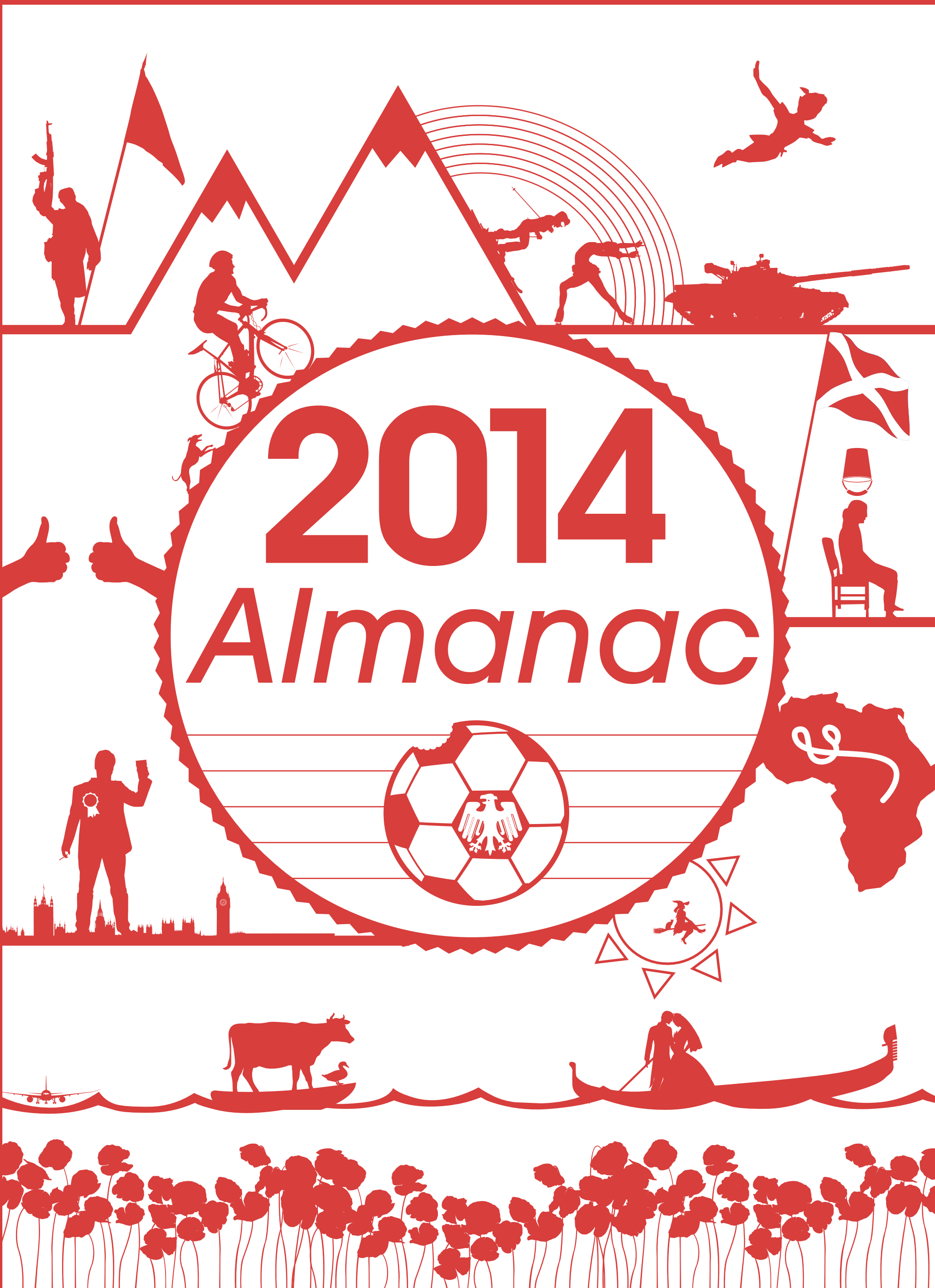
Ipsos MORI

2014 Almanac



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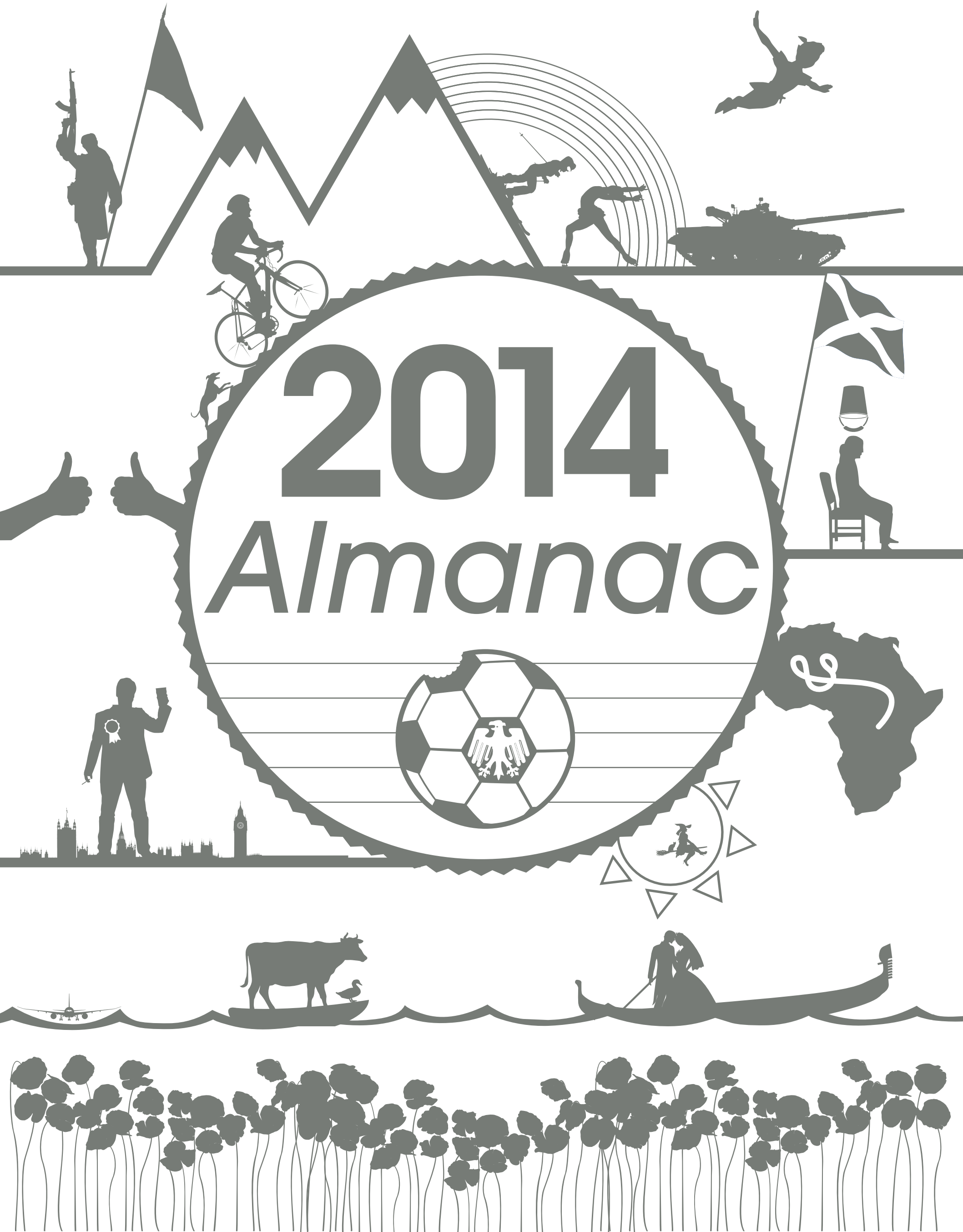
2014
Almanac

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Foreword

by **Ben Page**
Chief Executive
Ipsos MORI

Welcome to our 2014 Almanac. A year full of surprises. A surge in the public's economic optimism this spring, but falling unemployment did not see a rise in personal financial optimism.

Our politics is more uncertain than ever, a 'war of the weak': Labour's post-referendum collapse in Scotland, the unpopularity of Ed Miliband, and their perceived weakness on the economy saw them lose support again in 2014. But despite improvements in the economy, and David Cameron's relative popularity, the Conservatives remain the most disliked party. Their cousins and defectors in UKIP make it even harder for the Conservatives to do what has only ever happened twice before: increase support at an election after being in power for over two years.

Uncertainty prevails. The young are more pessimistic than in previous generations about their future, a view shared all over the world, as we discovered in our first ever Global Trends Survey, which we report on here.

As always in Britain – and in most other societies – tradition matters. The anniversary of 1914 was an opportunity to reflect on our military and personal history, which only 2% of us think is best forgotten. At the same time, our analysis of generational change shows that attitudes to homosexuality, or traditional roles for men and women, are changing rapidly because of generational shifts. The pre-1945 generation, while outliving previous generations, are now in their final years.

For business, there has been opportunity and challenge from new technologies. Combine this with new consumer behaviour and there are rapid changes in how we shop and spend our leisure time, shaking up traditional market leaders.

In our own world of research we have more powerful tools and techniques to understand people better than ever. All businesses face increasing pressure on leaders and managers to innovate and drive staff performance – something we have seen happen in workplaces across Europe.

One can point to British and European collective pessimism and say it is justified when you look at the very considerable pressures on wages and public spending coming in 2016 onwards, and from globalisation and technology – whoever wins the election. Or one can point to faster economic growth than in many other developed countries, to innovation and rebalancing of the economy and to low unemployment.

We think the British tend to collective pessimism, and occasionally need to cheer up, so we hope you enjoy what we have focused on this year in business, society, politics and the economy.

From everyone at Ipsos MORI, here's to a peaceful festive season and a successful 2015.

Ben Page

Ben Page,
Chief Executive, Ipsos MORI
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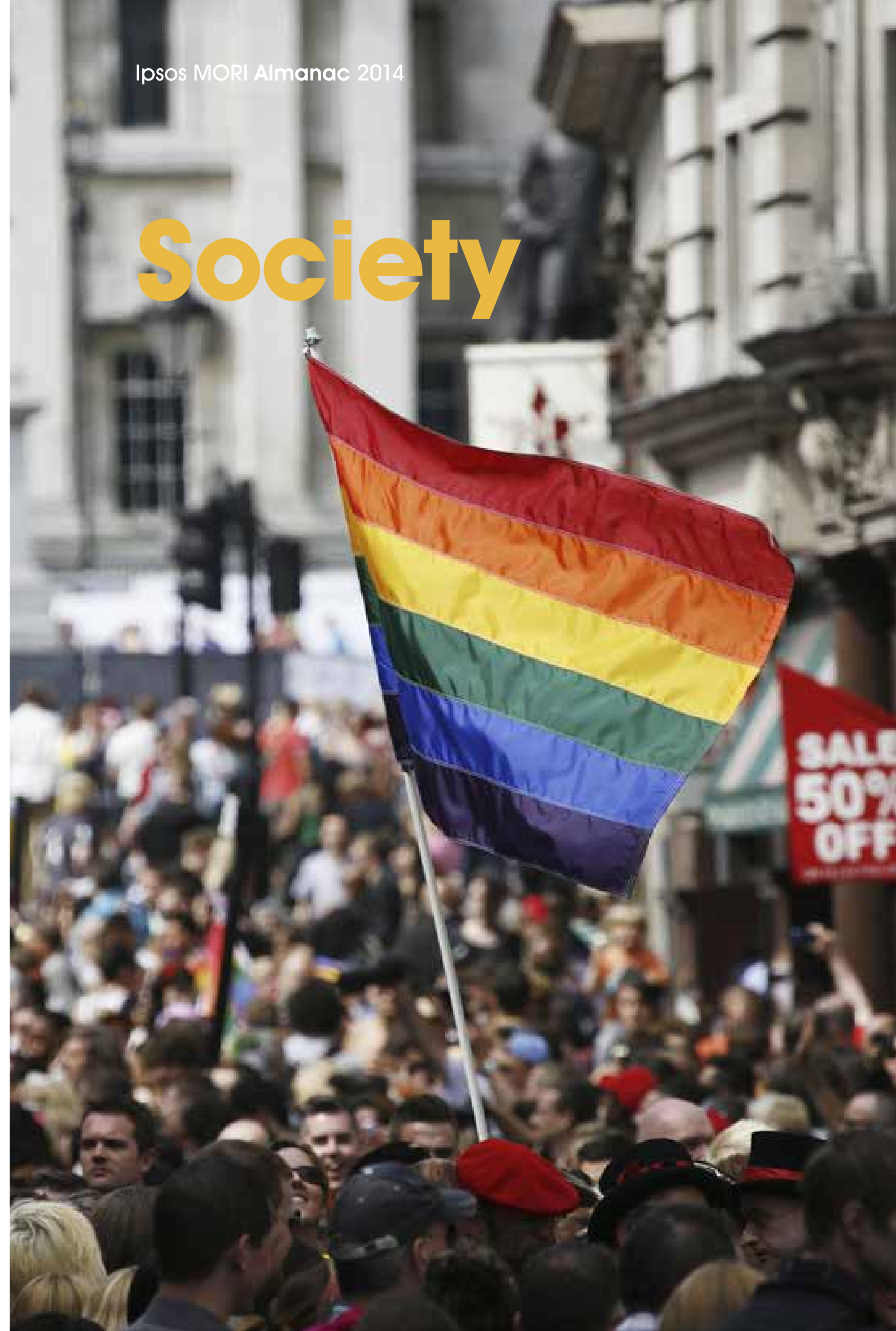
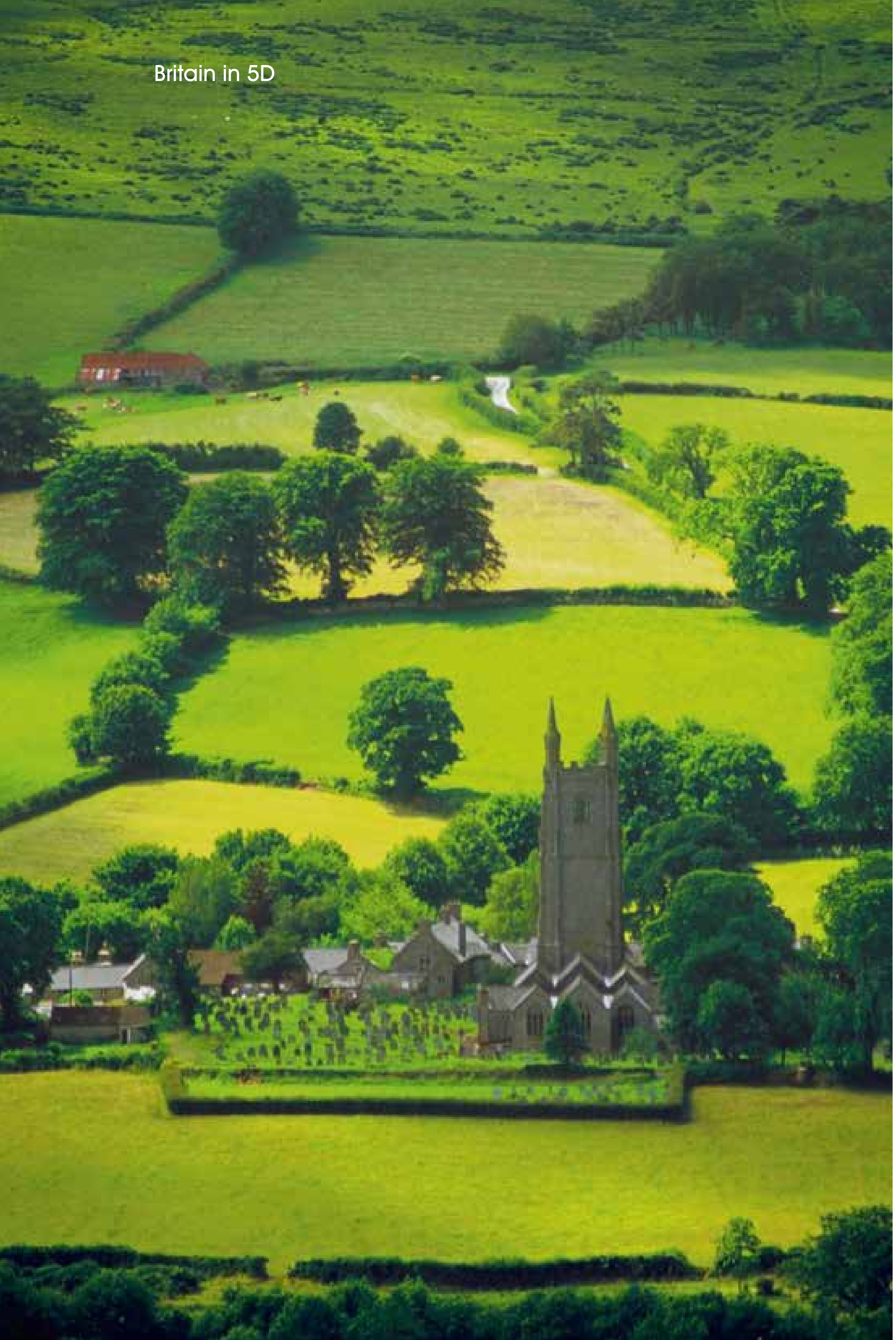
Society





Britain in 5D

by **Ben Marshall**
Director
Ipsos MORI Social Research Institute

Most Britons felt hopeful about this year, and our economic optimism reached record levels by the summer. However, the overall feel-good factor has remained elusive. In political terms, voters became more fractious than ever. Even as the recession slowly recedes, the public – and indeed Britain's elites – are more and more concerned that multiple risks confront us. We call them the 5Ds: Danger, Disorientation, Downturn, Devices and Devolution.

Danger

Some of the anxiety is global, imported from a world experiencing unprecedented movements of people, slow and patchy recovery from economic depression in the west and rising geo-political tensions. The Middle East conflict and the strained relations between east and west came to the fore in Gaza, Iraq, Syria and Ukraine this year. Then came Ebola.

Britain today...

Source: Ipsos MORI Global Trends Survey. Base: 1,000 GB adults among 16,039 across 20 countries, online, 3-17 Sept 2013

In early October James Angus, editor of BBC Radio 4's Today programme, warned that the "preponderance of difficult, distressing foreign news stories" was turning off listeners[1].In Ipsos MORI's monthly Issues Index, concern about foreign affairs reached heights not seen since November 2009, while our Global Trends Survey found that Britain, as elsewhere, views the world as an increasingly dangerous place (74%).

At home, the British became less worried about crime – concern dropped to its lowest level since October 1992 – but the threat from Islamic State (IS) and 'radicalisation' of some communities became headline news again. Mayor Boris Johnson even took to warning Londoners to be especially vigilant while travelling on the Tube[2].

11-16 year olds already have a sense of challenges

Do you think it will be easier or harder for you to buy your own house than it was for your parents?

Source: Ipsos MORI Young People Omnibus (2014), Base: 2,734 11-16 year olds, 3 Feb - 10 April 2014

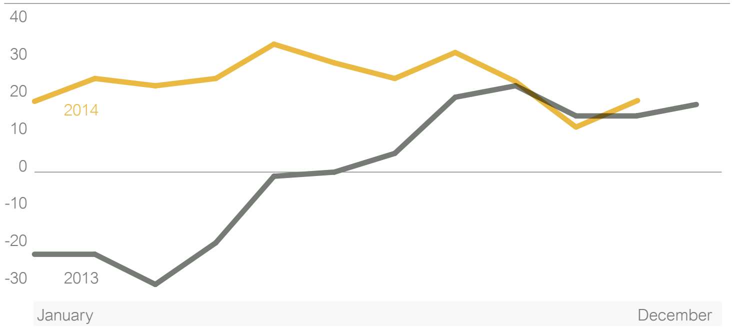
Disorientation

Anxiety about events abroad was matched at home by evidence of the unsettling nature of modern life. While Ray Kurzweil's view that this century will see 20,000 years of progress at today's rate is almost certainly over-stated, it does encapsulate anxiety about 'accelerative change': 62% of Britons believe that 'the world is changing too fast', 53% agree 'I wish life was more simple'. It may be that, had we asked the same question in 1814 or 1914, we would have had the same answer, but it is indicative of the tension. While only 41% agree globalisation is good for Britain, 81% in China do.

The vast majority of Chinese think that their youth will have a better life than their parents' generation, four times the proportion here. Our 'Generation Next' research this year showed that our 11-16 year olds already have a sense of the challenges facing them; for example, 40% think it will be harder for them to buy their own house than it was for their parents[3].

Economic optimism reached record levels

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months? (get better minus get worse)



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

Downturn

Our Economic Optimism Index stood at a healthy +19 in January, much healthier than the almost mirror opposite, -22, twelve months earlier. But more people expected unemployment to rise this year than expected it to fall, as well as inflation and mortgage interest rates to rise. In the event, inflation has been stable[4], there have been record drops in unemployment[5], and the now growing economy is bigger than it has ever been. By May, economic optimism was at a record-breaking +35: more people expecting improvement rather than deterioration.

Our polls, however, show that most people are not feeling the effects of recovery; for 80% it is a statistical recovery rather than a lived experience. We found financial worries extending from paying bills to job security, to the impact

of future Bank of England rate rises and further public spending cuts. Certainly, the prognosis for public finances looks bleak and, if not cognisant of the detail, the British are acutely aware that the effects of the downturn will be long-lasting[6]. Recovery will be unequal too – this year researchers quantified Britain's 'underclass' at half a million people, while in London the number of billionaires has trebled in 10 years[7].

Devices

Amazon and Google are piloting the use of delivery drones, while driverless cars and tube trains will be with us fairly soon. Digital innovation continues at a dizzying pace. 2014 has seen, among other digital phenomenon, the 'selfie' (and associated 'photobombing'), the charitable 'ice bucket challenge', the 'Snappening'[8] and the campaigning use of social media by IS, with the #NotInMyName counter-narrative.

Digital technology is apparently changing our language; a study of spoken English unsurprisingly found 'Facebook' and 'smartphone' among key words rising in usage (with 'marmalade', 'pussycat' and 'marvellous' on the wane![9]). Some have also gone so far as to suggest that the habit of 'digital snacking' on information will inevitably change the way we think, as well as the way we behave[10]. It seems hard to disagree that "the most significant revolution of the twentieth century so far is not political… [but] the information technology revolution"[11].

Devolution

But politics still matters. The electrifying Scottish referendum campaign generated the highest ever turnout at a British

A quarter would do democracy very differently

To what extent do you agree or disagree ... ?

Source: Ipsos MORI Political Monitor. Base: 1,011 British adults 18+, 7-9 December 2013.

electoral event. Scotland voted 'no', but most commentators agreed that Britain will never be the same again – not just because of 'devo max' but also because of the ramifications for England, Wales, London, our regions and cities, and the subsequent collapse of Labour in Scotland.

By five to one Britons agree their country is too centralised[12] and most are in favour of giving more power to local, municipal or regional government. Globally, only Americans are keener on more decisions about public services being made locally[13]. But how much and what power? Our polls show that the public want more local control, but are divided over controlling taxation locally, and want someone to make sure it doesn't lead to major differences in services, which is seen as 'unfair'. Of course there are large variations in public services in the UK, but the public doesn't like to think about it.

A desire for localism – at least in principle

To what extent do you agree or disagree ... ?

Source: Ipsos MORI/JRRT. Base: 2,008 GB adults 18-24 July 2014.

Britons certainly don't want more politicians. Perhaps tellingly in a year in which we found a quarter of the British public ready to replace elected politicians with professional managers[14], there were significant interjections by non-politicians ranging from Justin Welby, Mark Carney, JK Rowling to Andy Murray (not without criticism). Meanwhile, the 'anti-politics' party, UKIP, continue to have a disruptive, populist influence.

What next?

As 2014 draws to a close, continued uncertainty – not least over the election outcome – seems inevitable.

Perhaps the key question for the public is not how is such change going to shape us, but rather, how do we shape that change? Britain tends towards evolution and muddling through, but it is perhaps time for a more strategic consideration of what we want, what we need and how to manage change. Whether a fragmented public trust those in authority to make those decisions is, however, very doubtful.

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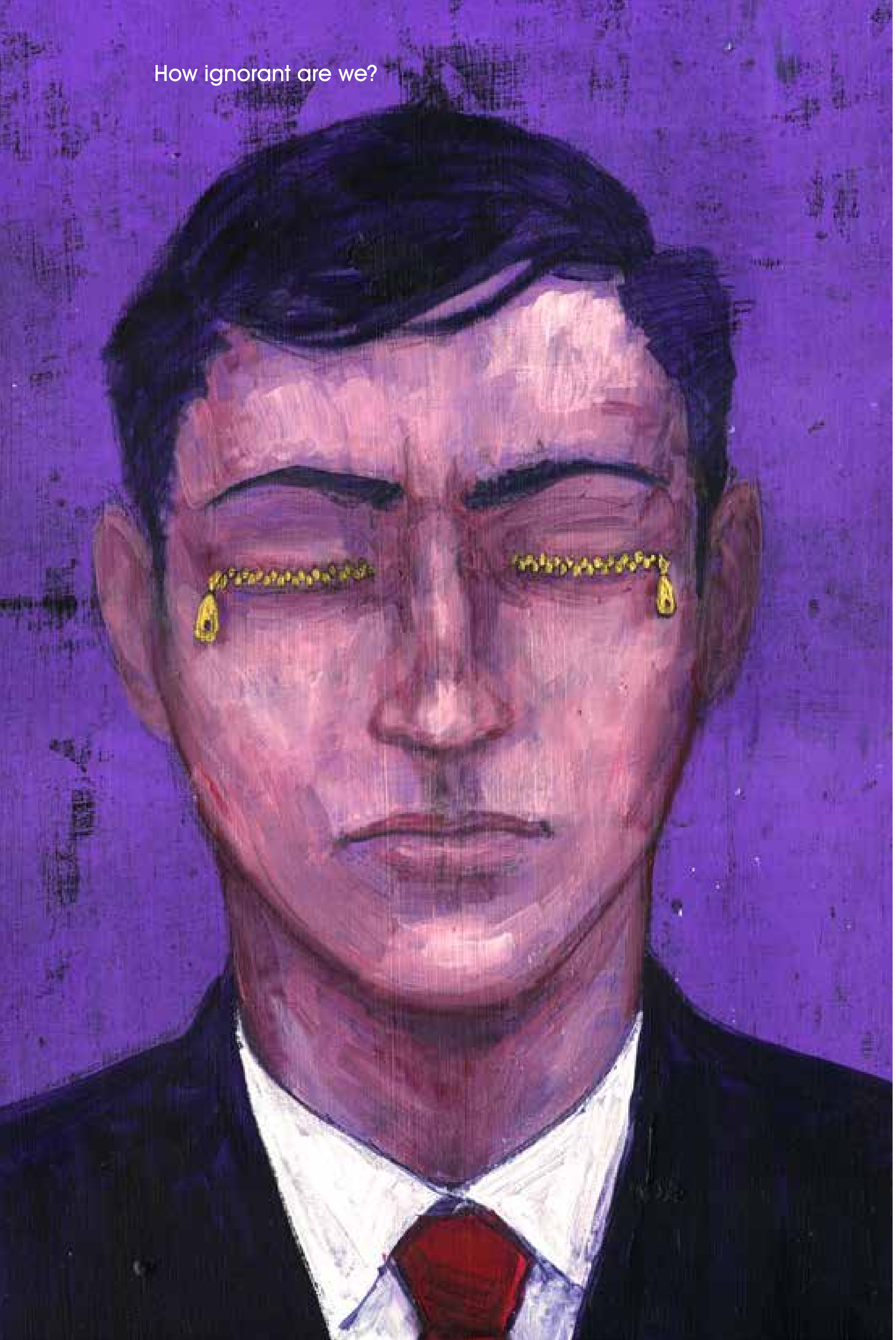
One in four

agree that the role of women in society is to be good mothers and wives[15]



How ignorant are we?

by **Bobby Duffy**
Managing Director
Ipsos MORI Social Research Institute

We know from our 2013 ‘Perils of Perception’ study that people in Britain are wildly wrong on many basic facts about our population and key social issues. The average person has a pretty poor understanding of things like what proportion of the population are immigrants or Muslims, what percentage of teenage girls get pregnant each year and how the government spends our money.

But are we uniquely ignorant in Britain? We decided to find out.

It turns out that people in other countries are just as wrong – in fact, often much more so than the British.

For example, Americans think that a quarter of all US teenage girls give birth each year – when the actual proportion is just 3%.

Huge overestimation of teenage births

In your opinion what percentage of girls aged between 15 and 19 give birth each year?

	% point difference too high	average guess %	actual %
US	21	24	3
Poland	17	18	1
Italy	17	17	0.5
Hungary	14	16	2
Canada	14	15	1
Great Britain	14	16	3
Australia	14	15	2
Germany	14	14	0.4
South Korea	13	14	0.2
Spain	13	14	1
France	12	12	0.6
Belgium	11	11	0.7
Japan	10	11	0.5
Sweden	7	8	0.7

Source: Ipsos MORI Perils of Perception 2014. Base:11,527 adults aged 16-64 across 14 countries, online, 12-26 Aug 2014.

The US is also one of the countries that are furthest from reality on the extent of immigration, with an average guess of 32%, when the actual proportion is just 13%.

The French think 31% of their countrymen are Muslims, when the real figure is 8%. The French are also too pessimistic about democratic engagement: they estimate only 57% voted in the last presidential election, when actually 80% did.

Incredibly, Italians think that half of their population is over 65 years old: Italy does have a relatively old population, but the actual figure is only 21%. Even more bizarrely, Italians also think half their population is unemployed, when the real figure is only 12%.

Looking across all the questions, Britain does relatively well: we're 5th most accurate out of 14 countries in our 'Index of Ignorance'. Italy is the most wrong, with the US next worst. The most accurate countries are Sweden and Germany – although, even here, people are often very wrong.

So what's going on here – why are people around the world so far from reality?

It's partly that people just struggle with basic maths, and some clearly misunderstand the questions – there are lots of ludicrous estimates from many individual respondents.

People also take all sorts of mental shortcuts, where they grab for easily available information even if it doesn't quite fit the question. In Daniel Kahneman's terms, answers to these sorts of questions are classic examples of 'fast' thinking, rather than 'slow'[16].

Of course, the media are also bound to have a role in exaggerating our misperceptions – but we need to be careful here. Whenever we release results from these studies in the UK, one of the

Index of Ignorance

1st Italy

2nd US

3rd South Korea

4th Poland

5th Hungary

6th France

7th Canada

8th Belgium

9th Australia

10th Great Britain

11th Spain

12th Japan

13th Germany

14th Sweden

first responses is always "that will be a Daily Mail effect". But the international element to this study shows we can't lay the blame entirely at one particular title, or even type of newspaper: if the media are a cause, it's a much broader global issue.

The real driver is how we remember information – how a single, vivid anecdote sticks, even if it's describing something relatively rare. Politicians and the media regularly take advantage of this, but it is us who are susceptible to it.

We also suffer from what social psychologists call 'emotional innumeracy'[17] when answering these types of questions: we are sending a message about what's worrying us as much as trying to get the right answers. Cause and effect can run both ways, with our concern leading to our misperceptions as much as our misperceptions creating our concern.

So, if there are all these explanations, does it really matter?

There are very clear instances where it is important. For example, we know that our mental image of 'normal behaviour' is important in how we ourselves behave. Consistently underestimating voter turnout is a problem then, as people have the wrong idea about the 'norm'. Equally, an unfounded fear about rising crime can directly affect our quality of life and make us focus too much time and resources on the issue.

There are also more doom-laden schools of thought that say what we're measuring here is 'rational ignorance'[18] – people have no reason to inform themselves, with all the costs of time/effort that entails, if they can't influence anything.

What's the point in finding out about how government spends our money, whether crime is increasing or decreasing, or how many immigrants are coming to the country if our vote doesn't affect political outcomes and decisions remain outside our control?

In this reading, our ignorance is due to a fatal flaw in our democratic system – one that cannot be overcome. The only option is to slash the state and central political control, and push decisions down to local areas and individuals where choices are more personal and therefore better-informed.

This is a logical conclusion, but extreme – our lack of political power is far from the only reason for our ignorance. Our study shows it's not quite as consistent and inevitable as this suggests – some countries have a much better grasp of reality than others, and understanding why could help (it doesn't seem to be national education levels or press behaviour, from our analysis).

But it does point to one key trap. Our ignorance is as much a symptom of our lack of control as a reason to keep power with an elite who supposedly know better. We should not conclude that people are too dumb to be trusted to make decisions – if we want a better informed population, we need to trust them more.

To test how you rank in our Index of Ignorance, take the quiz at **www.ipsos-mori.com/perceptionsquiz**

To get in touch with Bobby,
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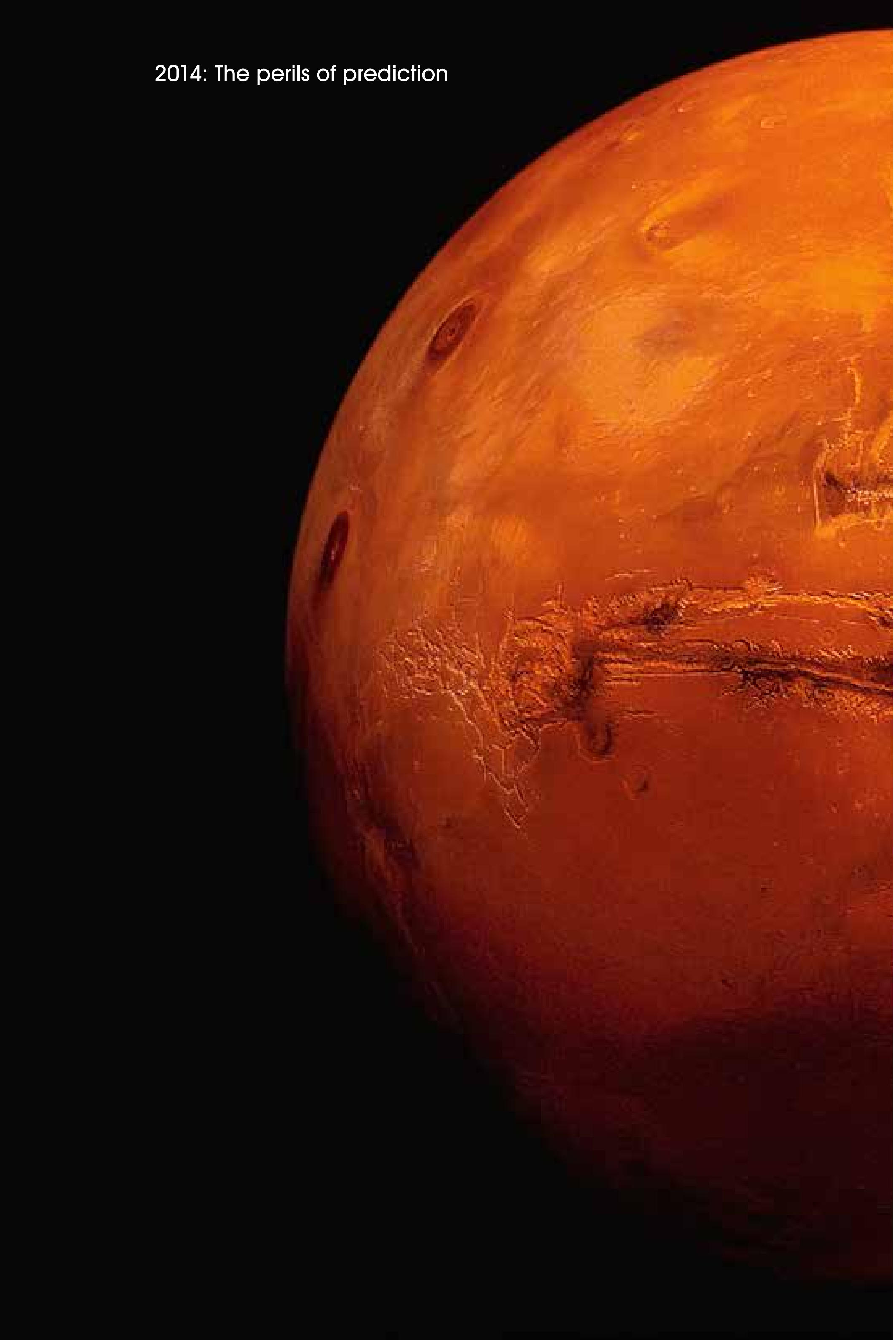


2014: The perils of prediction – politics and life on Mars

by **Gideon Skinner**
Head of Political Research
Ipsos MORI Social Research Institute

In January 2014, Labour were hoping to hang on to a nine point lead in the polls[19], while the Conservatives hoped rising economic optimism[20] could bring up their vote share. The Liberal Democrats were just hanging on to third place in the polls ahead of UKIP, who the public thought were as likely to win the European elections later in the year as we were to find life on Mars![21] The 'No' campaign held a twenty-six point lead in the polls for the Scottish Independence Referendum[22], and looked likely to win easily.

Skip forward and UKIP have not only won the European elections, but have two elected MPs. The race in Scotland had a nail-biting finish and a massive post-referendum boost for the SNP, and the hopes of all of the three traditional parties failed to come to fruition.

So what happened?

The ‘war of the weak’ between the traditional parties continues, with the combined vote share held by Labour, the Conservatives and the Liberal Democrats at just 70% in November, down from 90% in the 2010 general election.

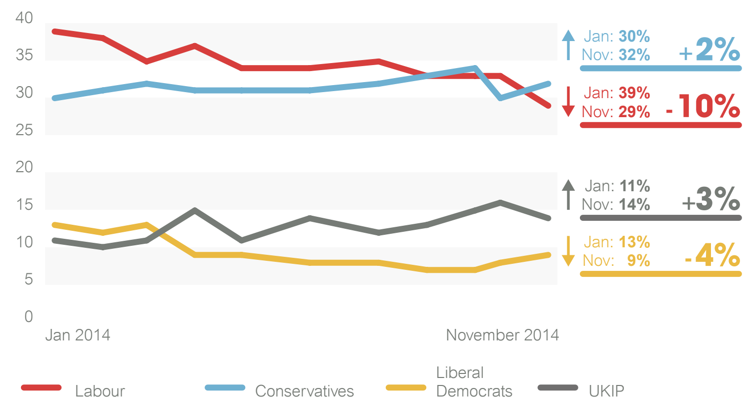
Continuing economic optimism has so far failed to bring the Conservatives the poll boost they need for a majority government next year. May saw 53% thinking the economy would improve over the next year, the highest level ever recorded in the 36 years since we began asking the question in 1978. Optimism has since dipped, in line with other peaks of economic optimism, but the Conservatives’ vote share has stayed pretty static throughout – even when economic optimism was at its height, they were still only on 31%.

Meanwhile, the Labour Party have had a bad year. Their vote is falling, despite the fact that the Conservatives are not making the gains they would like either. Labour’s vote share averaged 35% in the year to November, with their vote share unchanged from August through October at 33% – down from 39% in January and an average of 38% in 2013.

Ed Miliband’s ratings remain very poor, to put it politely, with November seeing his ratings drop to the lowest of any Labour leader since Michael Foot. He is even struggling for support from Labour voters; six in ten (58%) were dissatisfied with his performance in November, the highest level of dissatisfaction ever recorded for a leader of a major party amongst their own followers in the 20 years we have collected this data.

The parties’ fortunes through 2014

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



Source: Ipsos MORI Political Monitor. Base: c.500 British adults certain to vote each month, January – November 2014

The Liberal Democrats have been consistently in fourth place behind UKIP since April – and for three months were on a level pegging with the Green Party. The weakness of Labour and the Conservatives would traditionally have been a great opportunity for the Liberal Democrats. In November 2014 just 61% supported one of Britain’s two largest parties; the last time support for the two was that low was April 2010, when the Liberal Democrats were flying high on 32% following the pre-election television debates. Their lack of ‘protest party’ status in the coalition no longer gives them this opportunity.

Instead, UKIP have now seized the mantle as the party that is different to the rest, hitting a record 16% of vote share in October, following their win in the Clacton by-election –

UKIP are no longer considered a 'wasted vote'

Please tell me to what extent you agree or disagree with the following statement ... 'a vote for UKIP in a general election is a wasted vote'

Source: Ipsos MORI Political Monitor. Base: 1,002 British adults 18+, 11-14 October 2014.

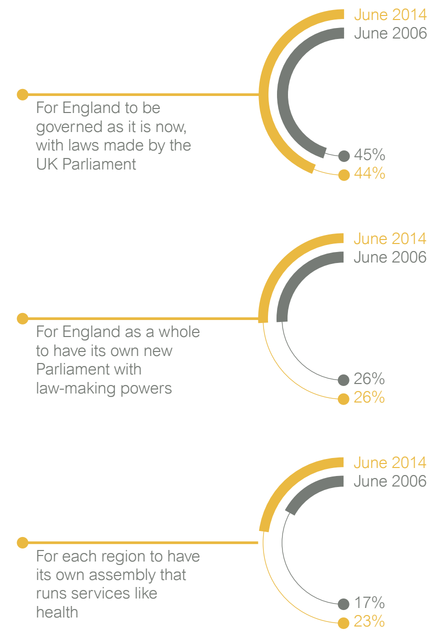
disproving any prediction that they would fizzle out following the European elections. They are also on par with the Conservative and Labour parties on immigration policy, one of the three topics most important in deciding people's vote, along with the NHS and the economy. UKIP are no longer seen as a 'wasted vote' by the majority of Britons.

Mark Diffley gives an in-depth overview of the massive upheaval in Scottish politics elsewhere in this issue, but promises of devolution made by the 'No' campaign in the final days before the Scottish Referendum have also left the rest of the country in a quandary over the 'West Lothian question' – if only Scots can vote on Scottish policies, should the English alone be able to vote on English policies?

The majority of the British public support the Scots being able to decide their own rate of income tax – but also think

No consensus yet on the West Lothian question

With all the changes going on in the way different parts of Great Britain are run, which of the following do you think would be best for England?



Source: Ipsos MORI Political Monitor. Base: 1,001 British adults 18+, 14-17 June 2014.

similar powers need to be provided to the English and Welsh (55% support Scots to have these powers, 56% the English and 54% the Welsh). The devil, as ever, is in the detail, with the public split as to how exactly laws only affecting England should be made.

2014 has been a year of political tumult – and reminds us that even the best of predictions can be overturned by events. The 2015 general election has many unusual characteristics - the ‘war of the weak’ between the main parties, the rise of UKIP (and other parties, notably the Greens and the Scottish National Party), Britain’s first post-war coalition government, various contradictory historical precedents – which only suggest that 2015 may be even more unpredictable than 2014. And we haven’t even heard back yet regarding life on Mars…

To get in touch with Gideon,
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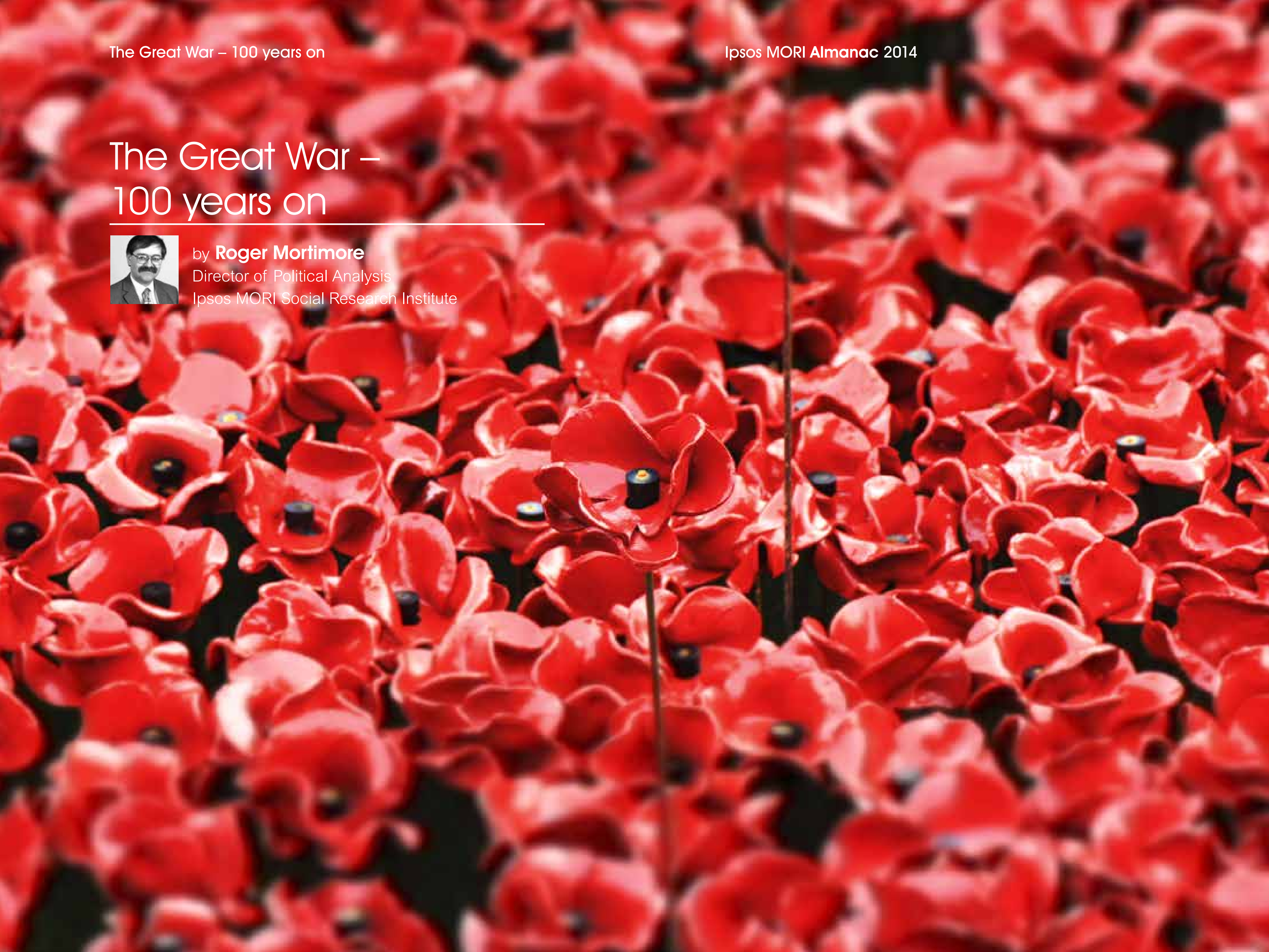
Six in ten back UK military intervention against IS[23]



The Great War – 100 years on

by **Roger Mortimore**
Director of Political Analysis
Ipsos MORI Social Research Institute

Among the most memorable visual images of 2014 was the sea of ceramic poppies in the moat of the Tower of London. The display, to mark Remembrance Day in this centenary year of the outbreak of World War One, drew millions of visitors, as well as calls for the installation to be extended or even made permanent.

An Ipsos MORI survey over the Remembrance weekend found that commemorating the Great War is important to most of the British public: five out of six people (84%) said it was at least ‘fairly important’, with well over half, 57%, saying it was ‘very important’ to them personally. This was not unexpected. A strong level of support for Remembrance events is well established, and does not simply arise from this year’s focus on the centenary: in 2009, for example, we found almost unanimous agreement (94%) that it was important to continue observing the two minute silence on Armistice Day.

But in one respect, the conception behind the Tower of London installation was entirely out of step with public opinion. Although the Guardian’s art critic, Jonathan Jones, was widely vilified for criticising it, his underlying point was one that most people in Britain agreed with. The display consisted of 888,246 poppies, one for each British casualty in the war, but making no direct reference to the dead of other nationalities, allies or enemies. However, four in five of the public (80%) think that commemoration of the war should remember ‘the losses of all countries on both sides of the war’, with only 5% saying it should be restricted to the losses of Britain and the Empire and 10% that it should include Britain’s allies, although not their adversaries. (Only 2%, though, said that there should be no commemoration at all.)

Attitudes towards the Great War

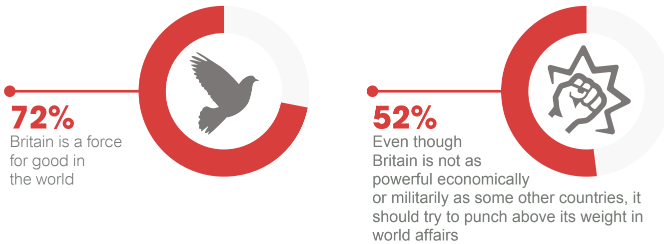
Which of these statements is closest to your opinion of World War One?

Source: Ipsos MORI. Base: 1011 GB adults aged 18+, 8-10 November 2014

But there is less of a consensus on what we are commemorating. Just over half (54%) feel the War was necessary to protect the freedom of Western Europe, but more than a third (36%) feel it was ‘a waste of many lives for no good reason’.

Protecting the freedom of others is still a subject close to the hearts of the British public – in a poll conducted in October, nearly half of Britons (47%) said that British armed forces should intervene abroad when other people’s rights and freedoms are threatened. This figure is up 16 percentage points from when we last asked the question in March 2013. The changing context needs to be borne in mind however – the March 2013 poll was at the tenth anniversary of the Iraq war and amid discussions of Britain’s role in that, while the recent poll was conducted against a backdrop of atrocities committed by Islamic State (IS) in Iraq and Syria.

Britain's role in the world



Source: Ipsos MORI Political Monitor. Base: 1,002 British adults 18+, 11-14 October 2014.

While the UK may no longer be the imperial superpower it was one hundred years ago, there is still a strong belief among the British population that Britain should play an active role on the international stage – 52% believe that Britain should try to punch above its weight in world affairs even though it is not as powerful economically or militarily as some other countries. This is almost certainly influenced by the fact that seven in ten (72%) believe Britain to be a force for good in the world.

In a year that also saw the last British soldiers leave Camp Bastion in Afghanistan, it is interesting to think forward a hundred years. How will the modern conflicts in Iraq, Afghanistan and elsewhere be viewed in 2114? Will such high numbers believe these wars were necessary to protect our freedom and the freedom of others? Will we still be as generous in our desire to commemorate those on both sides of the divide?

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We think the British population is much older than it actually is – the average estimate is that 37% of the population are 65+, when it is in fact only 17%[24]

A bombshell in Scottish politics

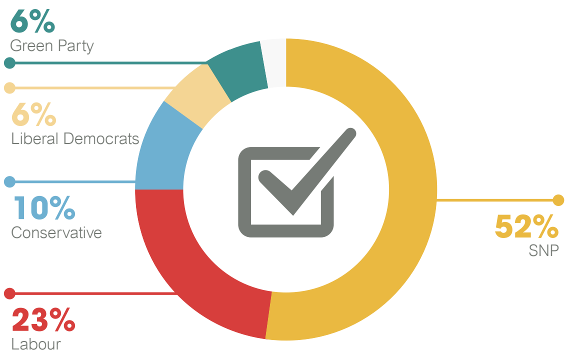
by **Mark Diffley**
Director
Ipsos MORI Scotland

Scottish politics feels a little like a parallel universe at the moment. Despite the ‘No’ campaign carrying the day in September’s independence vote by nearly 400,000 votes, the Scottish National Party (SNP) is enjoying a huge post-referendum dividend while Labour and the other unionist parties may suffer heavily in next year’s election. The referendum losers now feel like winners, while the winners feel like losers.

Our October poll for Scottish Television[25] drew this into sharp focus. With six months remaining before the 2015 general election, it highlighted that Labour can no longer rely on one of the absolute certainties of recent decades in Westminster elections – that the political map in Scotland will be overwhelmingly red. Indeed, if the results of the poll, which put the SNP on 52% with Scottish Labour on 23%, were repeated in May, Labour would likely lose the vast majority of the 41 seats it currently holds north of the border.

Westminster – voting intention

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



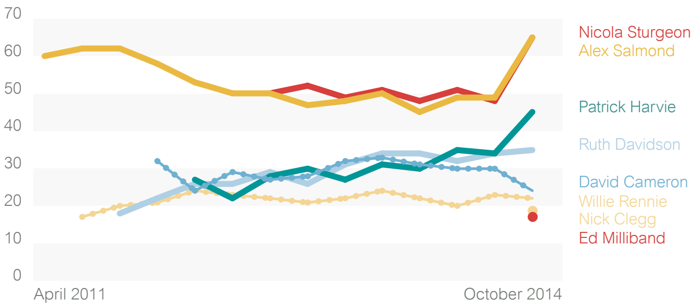
Source: Ipsos MORI/STV. Base: 1,026 Scottish adults, aged 18+, 22-29 Oct 2014

Why? Firstly, it is clear that many traditional Labour supporters felt that the party was on the wrong side of the independence argument. Our final poll before September's vote showed that nearly a third of Labour voters intended to vote 'Yes'[26]. In addition, qualitative research we conducted among voters who had switched from 'No' to 'Yes'[27] before the referendum highlighted the extent to which Labour alienated many of its core voters.

Secondly, while Scots rejected full independence in September, there is clearly an appetite for substantial new powers to be devolved to the Scottish Parliament[28], an issue currently being addressed by the Smith Commission, set up by David Cameron in the wake of the referendum. Although Labour prided itself as being the party of devolution in the

Satisfaction with party leaders

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



Ipsos MORI/STV. Base: All certain to vote, c1,000 Scottish adults aged 18+.

1990s, it now seems as if most Scots regard the SNP, rather than Labour, as the party most able to secure a robust new settlement for Scotland in the UK in the next few years.

Thirdly, while Scottish Labour remained leaderless until December, incoming First Minister Nicola Sturgeon enjoyed an approval rating of 65%[29], a score not experienced by any UK party leader since Tony Blair in the early years of his government[30]. That she is a Glasgow-based, left-of-centre politician is likely to give the SNP added appeal in the very areas where votes for Labour would have been weighed rather than counted, and where Labour can ill afford to lose further support.

In what is expected to be a very close general election in 2015, the implications of such a result will be felt across the UK. If Labour does not recover ground in Scotland it will deprive Ed Miliband of the opportunity to form a majority government. The party's new leader in Scotland has little time to reverse the trend in fortunes before their first electoral test.

Although the extent to which we see an SNP march into Labour's strongholds in May is far from certain, it is likely that the party will have many more MPs than the six it currently has. If it has a role in determining the next UK government, then politics in Scotland could be as interesting in 2015 as it was in 2014. It was, after all, the 11 SNP MPs who triggered the no-confidence vote in Jim Callaghan in 1979, leading to 18 years of Conservative government.

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Two-thirds of Scots

support a further independence referendum within ten years[31]

Science: it's more complicated than that

by **Jayesh Navin Shah**
Research Manager
Ipsos MORI Social Research Institute

Science is continually the subject of controversy. In 2014 we have witnessed, among other things, faked stem cell research, hard-hitting UN reports on climate change, hotly disputed by a minority, and a devastating blow to the dream of commercial space travel.

Despite this, science has been gaining in stature: the majority of British people view it in a positive light. Our Public Attitudes to Science 2014 study shows that 81% think 'science will make people's lives easier', and 55% think that 'the benefits of science outweigh any harmful effects'. The public are much more positive now than they were 25 years ago. Substantially more people agree that it is important to know about science in their daily lives (72%, versus 57% in 1988), and fewer now think that 'science makes our way of life change too fast' (34%, versus 49%).

People are also upbeat about the contribution science makes to the UK economy. Most agree 'scientific research makes a direct contribution to economic growth in the UK' (76%), and 91% agree that 'young people's interest in science is essential for our future prosperity'.

Even more heartening for scientists, 79% agree that, 'even if it brings no immediate benefits, scientific research which advances knowledge should be funded by the government', while 65% disagree that funding 'should be cut because the money can be better spent elsewhere'.

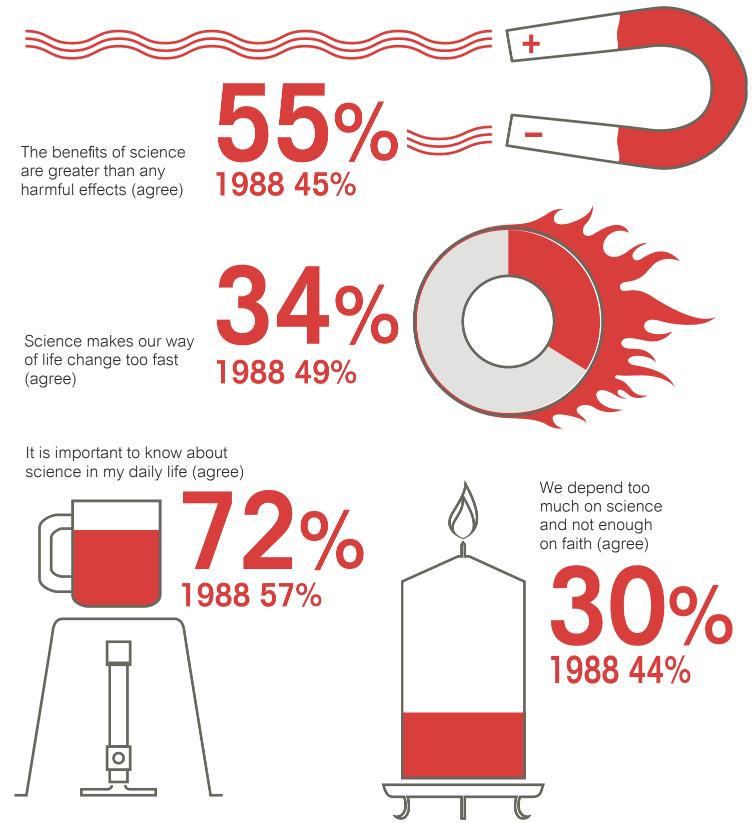
Does this mean we are entering a new age of reason? Of course not. Digging deeper into the results shows some important contradictions, rooted in public anxieties.

Despite 71% thinking scientists are 'honest', many people still have concerns about hidden data, or about the intentions of scientists and researchers. Some 35% think that scientists adjust their findings to get the answers they want. However, this may be due to a lack of understanding about how scientists actually work – 29% believe that scientific research is never or only occasionally checked by other scientists before being published.

As on many topics, public opinions of science are formed without any deep thought process. Even among people who report that they *do not feel informed about scientific research and developments*, 70% still agree that 'scientific research makes a direct contribution to economic growth in the UK'.

Informing people more about a science topic or new technology may not bring the desired results – on the issue of

Enthusiasm for science



Source: Ipsos MORI/Department for Business, Innovation and Skills. Base: (for 2014): 1,749 UK adults aged 16+, 15 July - 18 Nov 2013.

GM crops, perceptions of risks and benefits are more polarised among those who feel very well informed on the subject.

But this should not dissuade scientists from engaging with the general public. Most of us think that 'scientists should listen more to what ordinary people think' (69%), and that they should 'spend more time discussing the social and ethical implications of their research with the public' (68%).

Our research has consistently shown that the key to successful communication is to understand that there are multiple 'publics'. While people want to engage, not everyone will do so in the same way, or through the same channels. As always, policymakers should reflect on who they are aiming to engage and how. While some people will relish the technical details, others care more about the social and ethical implications of the work.

While the UK public's attitudes to science are overwhelmingly positive, this does not reduce the need for dialogue. The public may already support various scientific and technological changes in principle, but there are many concerns beneath this, and these are partly driven by confusion over how scientists go about their work, and what their intentions are. In 2015, scientists will, more than ever, need to communicate these points, and tailor their communication for different audiences – very few people will engage with the hard scientific facts alone.

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Only 18%

of Britons believe driverless cars to be an important development for the car industry to focus on[32]

Public services – 2014 and beyond

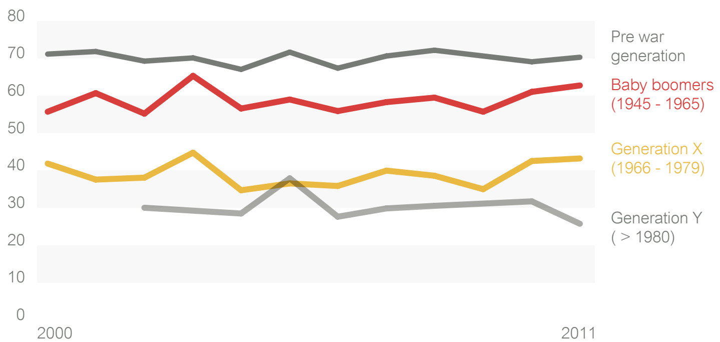
by **Suzanne Hall**
Director
Ipsos MORI Social Research Institute

Across the public sector there is some trepidation over the likely size of cuts after 2016 – whoever wins the election. So far, as we have reported every year since 2010, public services have coped relatively well with cuts. Satisfaction with most services, except road maintenance and social services, has been largely maintained or improved. However we are starting to face hard choices. Most of the public are now worried about the future funding of the NHS (88%) and it is now seen as a bigger issue than the economy in our monthly surveys, and there is reduced support for further cuts, compared to 2010.

With rising individualism and a political discourse that is framed around notions of 'deserving' and 'undeserving poor' does the notion of 'public service' still have resonance in modern Britain? The simple answer is yes, although each generation is very different when it comes to thinking about this. Around seven in ten of those born before 1945 agree that the creation of the welfare state is one of 'Britain's proudest achievements', twice the proportion of those from Generation Y (born post-1980) who say the same, and their views aren't changing.

Pride in the welfare state

The creation of the welfare state is one of Britain's proudest achievements



Source: Ipsos MORI reanalysis of British Social Attidutes data

But all generations still value public services as benefiting the whole community, and available to everyone. These views have barely shifted since 2001; the financial crash and subsequent years of austerity have not changed our fundamental values. As the Olympics showed us, public services like the NHS help foster a sense of national identity and pride – they're something that the UK is thought to do well and be renowned for.

Few believe the current government's plans will improve public services – although under Labour, with rapid increases in spending, perceptions were very similar – government can never expect to be thanked for its efforts!

While political parties might not talk about public services in terms of universal entitlement any more, this still matters to the public. Some three in ten say public services need to

Only one in three think government will improve public services

In the long-term, this government's policies will improve the state of Britain's public services

Source: Ipsos MORI Political Monitor. Base: 1,009 British adults 18+, 12 – 15 October 2013.

provide exactly the same services to everyone, regardless of their situation in life (30%, an increase of 11 percentage points from 2010).

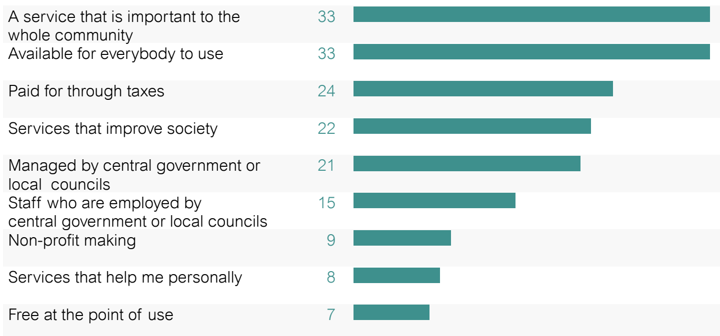
Recession and falls in real wages have left many more reliant on state support or more aware of how easy it would be to end up dependant on welfare. Universalism therefore becomes more of a priority in a time of scarcity, compared to boom years when more people can afford private alternatives, although sympathy for the working age unemployed remains limited.

But universality alone is not enough. How people are treated matters a great deal as well; eight in ten agree that treating people with dignity and respect is as important as the outcome. Value for money is also important. As usual the British want good value, universal services – but whether they can have them at current tax rates remains unclear.

In an age of increasingly personalised products and services in the private sector, the public sector is struggling

Public services remain strongly associated with universalism

Which one or two of these, if any, are closest to what you mean by 'public services'? %



Source: Ipsos MORI. Base: 989 GB adults 15+; 31 January – 6 February 2014.

to keep up – only one in four feel public services really understand their needs. A decade or more of efforts to 'empower' users has had no measurable impact on perceptions of ability to influence services (although of course, we cannot tell what perceptions would be without these efforts).

As we trudge through more years of cuts in public spending, most of us agree that different public services working together more often would improve the quality of services we receive. The pressures on future budgets mean we may finally see what pundits have talked about for so long, in terms of reconfigured, more efficient services and creative public private partnerships rather than lowest common denominator services. More likely, being British, we will muddle through.

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Support for EU membership highest for 23 years with 56% of Britons who would vote to stay in the European Union[33]

Data privacy – concern, confusion and apathy

by **Daniel Cameron**
Director
Ipsos MORI Social Research Institute

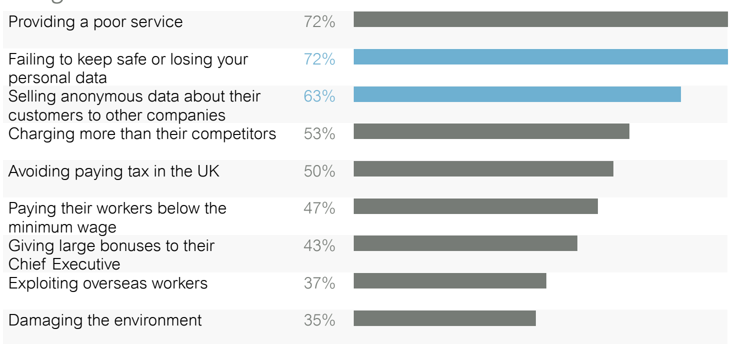
Throughout 2014 the stream of stories about hacked, leaked or scraped personal details from the military, business and celebrities was almost daily. But how do the public now view data protection and privacy? Are there any signs that people's concerns are changing how they behave, particularly online? What are the consistent themes that emerge from our research?

When we asked people what would be most likely to make them stop using a company, failing to keep personal information safe (72%) and selling on even anonymous data (63%) are right up there among the worst things a company can do, matched only by providing a poor service (also 72%).

So far, so straightforward – data protection and privacy are big worries. But when we asked a similar question without providing a list of options the responses were quite different.

Data protection and privacy are big worries

Thinking about a company you are a customer of (for example your bank or main supermarket), what actions by them, if any, do you think would make you most likely to stop using them?



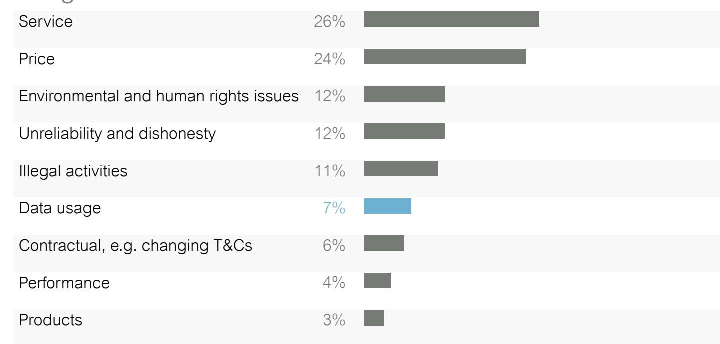
Source: Ipsos MORI. Base: Split sample, 1,009 GB adults aged 16-75, 23-25 June 2014

In terms of spontaneous concerns, data usage is at best a mid-ranking issue, behind service, price and companies engaging in other illegal, dishonest and unethical behaviours. Just two per cent of people specifically mentioned either losing or selling personal information as the thing most likely to stop them using a company. People expect organisations to protect their personal data, but this is not a tangible enough issue to be at the forefront of people's spontaneous concerns.

Another consistent theme is that people are very unclear about what happens to their data. As our report, Dialogue on Data[34], shows, people are aware in general terms that their personal information is collected, stored and used widely. They know data is asked of them all the time, for example when using companies' services, interacting with the

But less so when you don't prompt

Thinking about a company you are a customer of (for example your bank or main supermarket), what actions by them, if any, do you think would make you most likely to stop using them?



Source: Ipsos MORI. Base: Split sample, 1,009 GB adults aged 16-75, 23-25 June 2014

government, and making applications for jobs or courses, but they see the modern world as one in which providing data on a regular basis is 'just part of life', and that this will mean some loss of privacy.

But people are much less sure how their data is actually used. A good example is that many of us think our personal GP health records are already passed on in some way: either shared with academics for research purposes (41%); shared with private companies to help them develop better treatments (38%); or sold to private companies to make money for government (34%). Overall, more than half of us (52%) think at least one of these things goes on – but none of them currently does. Any data used for research should be depersonalised beforehand, and selling personal medical records should not be happening either.

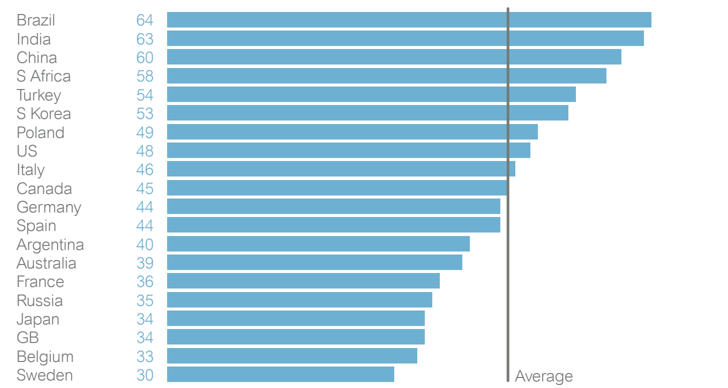
So the picture that emerges from across our work is one of frustrated, low-level concern. People are worried about what happens to all the data they provide. They feel they have very limited control, and no real choice but to provide personal information in order to access services. But, because most people have not experienced significant problems as a direct result of something going wrong with their personal data, concern is often weak or resigned. It is very difficult for people to see what they can do to alleviate their worries about personal data privacy.

This seems to create a fatalism, reflected in the massive disconnect between what they say and how they act. For example, nearly half of people (45%) across the 20 countries in our Global Trends Survey say they are willing to pay for increased levels of privacy for their data. But at same time, in the same survey, only a quarter of the same people (23%) say they have taken any basic steps to increase the privacy settings on their internet browser. This means that three quarters of those who say they would pay for additional privacy haven't even changed a simple setting on their computer. We also find massive overclaim when it comes to reading website terms and conditions before accepting them (hardly surprising when some rival the length of Hamlet!).

How should organisations respond to public concerns about data protection and privacy? Normally, we find that the more people know about a confusing or technical issue, the less concerned they become. Here, more than seven in ten people (71%) say they want to know what information government and private companies know about them. But

We say we would pay – but would we really?

I am willing to pay extra for a service or product to keep my details private (% agree)



Source: Ipsos MORI Global Trends Survey. Base: 16,167 adults across 20 countries (1,000 GB), online, 1-15 Oct 2013

transparency alone will not be enough – when it comes to our personal data, our research suggests that more information can lead to greater concern.

Organisations will need to think carefully about how they can increase transparency, emphasise the potential benefits of data sharing, and ensure that the right safeguards are in place to reassure and protect the public. Above all, being clear and consistent will be vital.

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British institutions

by **Harry Evans**
Research Assistant
Ipsos MORI Social Research Institute

The Media/Press

Only 11% of MPs trust journalists to tell the truth

“The media suffered literal trials and tribulations this year, and their status as untrusted, but hugely influential, remains.”

74% think the media **should have little power over government policies** but...

74% think that the **media do have a great deal/fair amount of power over government policies**

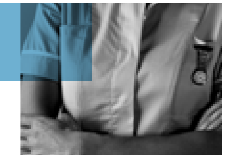
59% say they have **low trust in the media**

68% have **low trust in what the media do with data**

15%

of people have **written an email/letter to a newspaper, magazine or website**

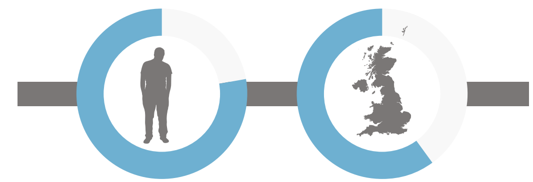
The NHS



“The NHS remains much loved but under pressure. Most of the public are anxious about the future – and so are the healthcare community. Patient satisfaction is holding up, despite rapidly rising numbers in A&E. The challenge comes after the election.”

2nd

The NHS is now second only to immigration as **one of the biggest problems facing Britain today** according to the public



78% think that **their local NHS is providing them with a good service** compared to **60% nationally**

73%

think **the NHS provides good value for money to taxpayers**, but...

88%

think **the NHS is going to face a severe funding problem in the future**

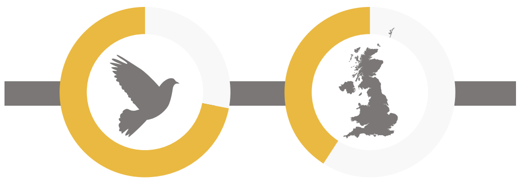
41%

have high trust in the NHS

The Armed Forces

> As they leave Afghanistan, the armed forces are among the most trusted UK institutions. Most of us think the UK is a force for good in the world: we remain proud of our military traditions.

63%
have high trust in the armed forces



72% think that **Britain is a force for good in the world** but **41%** think **Britain should stop pretending it is an important power**

47%

think the **British armed forces should intervene abroad when other people's rights and freedom are threatened**

15%

think **the British armed forces should not intervene abroad**, this number rises to 34% when Islamic State is mentioned

Banks

> Bankers remain hate figures, but are more trusted than ministers to tell the truth.

16% of **MPs mention getting banks to lend is one of the key problems facing British business today.** Much better than **35%** of MPs who mentioned it **in July 2013**

41%
have low trust in banks

45%
have low trust in what banks do with data

72%
would disagree with banks suggesting products based on analysis of how you were spending

The Government

> Government tends to be a pejorative word in Britain. The coalition government is managing to maintain public satisfaction with most services in austerity, but as ever, most of us are cross with it.

17% are satisfied with the way the government is running the country, 59% are dissatisfied

63%

think **Britain would be better governed if there were more women in cabinet**

Only 23%

think that **the opposition is ready to form the next government**, (61% disagree)

The highest trust in government in our 20 country study this year was in **Sweden**, the **lowest Italy**

Trust in civil servants has risen from 25% to 53%, since 1983, and is highest among the young

The Police

> Overall concern about crime is falling in Britain, and trust in the police's veracity – despite 'plebgate' – is stable at 66%, while their reputation remains much better than the media's.

20% have low trust

26% have low trust in what the police do with data

despite this **61%** believe that **police should be able to access data to combat crime**

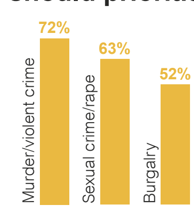
61%

disagree that **the police should be concentrating on current crimes, not investigating allegations of child abuse that happened many years ago**

50%

think that **the police in the local area are doing an excellent/good job**

Crimes police should prioritise



66% are confident that **local police will tell the truth**

71% are confident they will **keep you safe**

Ten global trends and what they mean for government, brands and business

by **Ben Page**
Chief Executive
Ipsos MORI

BY NASA: THE BLUE MARBLE

10 Global Trends

This year we took stock of public opinion in depth via a 20 country study called the Ipsos Global Trends Survey. We asked over 200 questions to look at people as citizens, as men, women, consumers, parents: in every dimension of their lives – from marriage to mealtimes, from personal ambition to advertising, from society to social media. From all of this we can see the complex, sometimes contradictory, nature of human attitudes and behaviours around the world.

The ten trends featured here are designed to give a flavour for some of the themes which emerged from our vast data set and provide a basic starting point for leaders and strategists within businesses, brands and governments to build on.

The full report, the data and slides can be found at
www.ipsosglobaltrends.com

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1: TECHNOLOGY
The culture of now

Attitudes to technology, and the impact it has had on behaviour, differ around the world. Emerging economies seem more accepting of the risks of sharing, compared to the more privacy-conscious west.

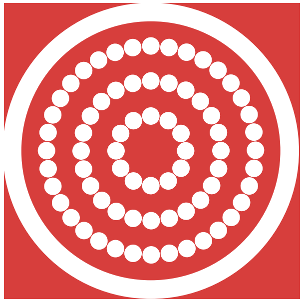
78% of Chinese consumers say they are constantly looking at screens, along with most people in western countries. Eric Schmidt, Chief Executive of Google, even argues that the constant interruption that characterises internet usage – which we now spend more time on than TV – is affecting our ability to think deeply.

New technology has always promoted anxiety – from the printing press to railways. There is a constant fear that mankind will create something that destroys humanity. But more immediately, as we explore elsewhere in this issue, technology will continue disrupting businesses of all sorts. For example, Britons buy more online than anyone else in the world, and our city centres will start to look different because of it.

2: PRIVACY
The Big Data debate

As Daniel Cameron explores in his article on data privacy, this is an ongoing area of flux and uncertainty. There is a massive disconnect between what people say and how they act on the subject of privacy. There is widespread anxiety, and no organisation is trusted by the majority of the British (and few other countries) to look after their data – especially after the Snowden revelations. But most consumers have done nothing to change their privacy settings. What we do find is that the more people know, the more concerned they are.

We see this as a huge area of potential conflict and dispute over the next decade as pervasive sensors in our homes (smart meters) and on our bodies (wearable devices like Up Bands) multiply the amount of information held by others, about us, exponentially.

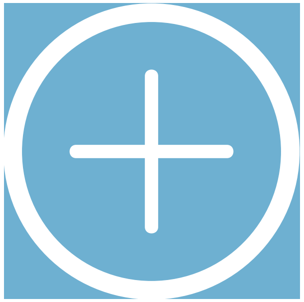


3: TRADITION
More forwards than backwards

Individuals want to live life on their own terms and are less likely to defer to the traditions and values of the past. But tradition lives! In a world that feels like it is moving too fast, there is a pervasive nostalgia for the past – seen in attitudes to life, family and religion. All over the world, 78% say traditions matter. In Britain the monarchy is as popular now as it has ever been.

Yet what we are seeing is a global 'pick and mix' attitude to tradition, where we choose the parts we like and reject those, like misogyny, we don't. Only in Russia do most men and women agree that 'the proper place for women is at home raising children'. In Britain, 24% still hold this view, but they are mostly very old.

For brands and governments, the challenge is to offer the reassurance people want, without being stifling.

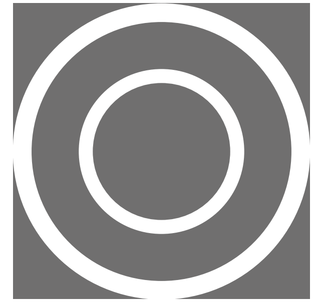


4: HEALTH
Personal and preventative

In most countries with developed health systems, people are pessimistic about how they will be maintained in future. Everywhere costs are rising rapidly, often because of prosperity. 72% want more control over their health, and the rise of much more personalised treatments and wearable devices tracking our conditions allow us to be more proactive in looking after ourselves.

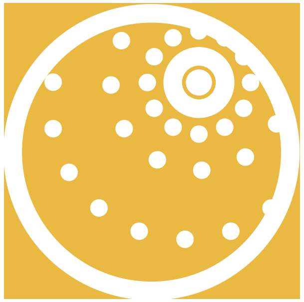
At present our attitudes are well out of step with reality – people in the country with the world's highest BMI feel satisfied with their weight (USA), and the Japanese, who are the least overweight in the G8, are more worried.

If we should take more responsibility, is it the individual or the government's responsibility to support healthier lifestyles? Many countries are highly divided over the extent to which government should get involved in promoting healthy choices – including the UK. With pressures on budgets and medical technology evolving faster and faster, health is a key concern that is going to be debated as much as ever in 2015 and beyond.



5: SIMPLICITY
Choice about choice

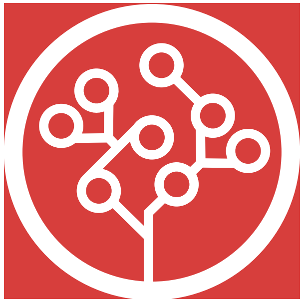
One of the strongest trends to emerge is how overwhelmed consumers feel by the range of choices they face. The public across the world hanker after simplicity. Whilst they are flexible, they feel overwhelmed by choice and want to slow down the pace of life. In a rapidly changing world, how can brands and businesses respond to reassure their consumers and citizens? Is what you offer as a service as easy to use as it could be? Why so many varieties of your product? Sometimes less is more.



6: GLOBALISATION
Global village

We live in a world which generally supports trade and globalisation, but which is notably more optimistic about the future closer to home than nationally or globally. In many developed counties – especially the UK and USA – there is a desire for more devolution of power, as we have just seen in Britain. In a study for the BBC earlier this year we found that both local connections – *and* international ones – are growing stronger[35], but regional ones weaker.

How do brands and governments harness this spirit of localism within a global landscape?

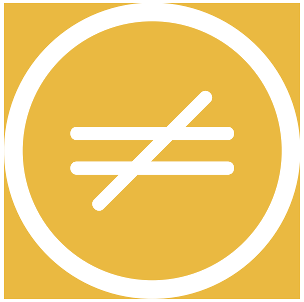


7: GENERATIONS
Generations apart?

The world is divided over the future – both between young and old, and between established and emerging economies. What happens when the assumption of an automatically better future for the next generation is gone?

Our young generations are now markedly more liberal and individualistic than the post war generation, which has clung to collective institutions. In some ways class is fading as a key marker of social attitudes and is being replaced by age cohort – important for politicians and brands alike.

Marketeers, traditionally obsessed by youth, despite an ageing society, cannot make assumptions about the next generation, or that people will age in the way they have done in the past. Older people are often now more rebellious than the young.



8: INEQUALITY
Sharing success

While people around the world are keen to improve their economic positon, with nearly half feeling under pressure to ‘make money’, they say they are also opposed to economic growth at the expense of social wellbeing. One of the clearest findings is a global dislike of inequality at a time when, although overall global living standards have been rising, so has inequality. Notions of ‘fairness’ are hardwired, though they will undoubtedly be debated as much as ever.

9: TRUST
Eroding authority

People around the world have little confidence in authority, with scepticism about government and business virtually everywhere. In Italy we found only 3% who trust their government.

This can be exaggerated – while most people say they do not trust government ministers in Britain, the earliest surveys from the 1940s show this scepticism is not new. Trust in most professions has been maintained for decades. However, overall most people are now more likely to say they trust the random voices of other consumers online more than elected officials.

Demonstrating authenticity and honesty is now the key challenge, at a time when no-one will be taken for granted. Jean Giraudoux, the French author and diplomat, famously said that if you can fake sincerity you’ve got it made. Increasing scrutiny means doing so is harder than ever for politicians and brands. The genuinely authentic – in every field – will do well.

10: BRANDS
Experience is the new brand

While consumers all over the world in our study like to say they are not affected by advertising or the power of brands, evidence tells us otherwise. Yet increasingly in societies where most basic material needs are met, experiences now matter more than products. It is how products and services make us feel that matters more than mere functionality and, as we explore elsewhere in this issue, emotion matters.

In terms of criteria for judging companies, authenticity and honesty now matter more than basic quality – which is beginning to be taken for granted. Lidl is benefiting from this. Tesco, despite its sophistication, is not.

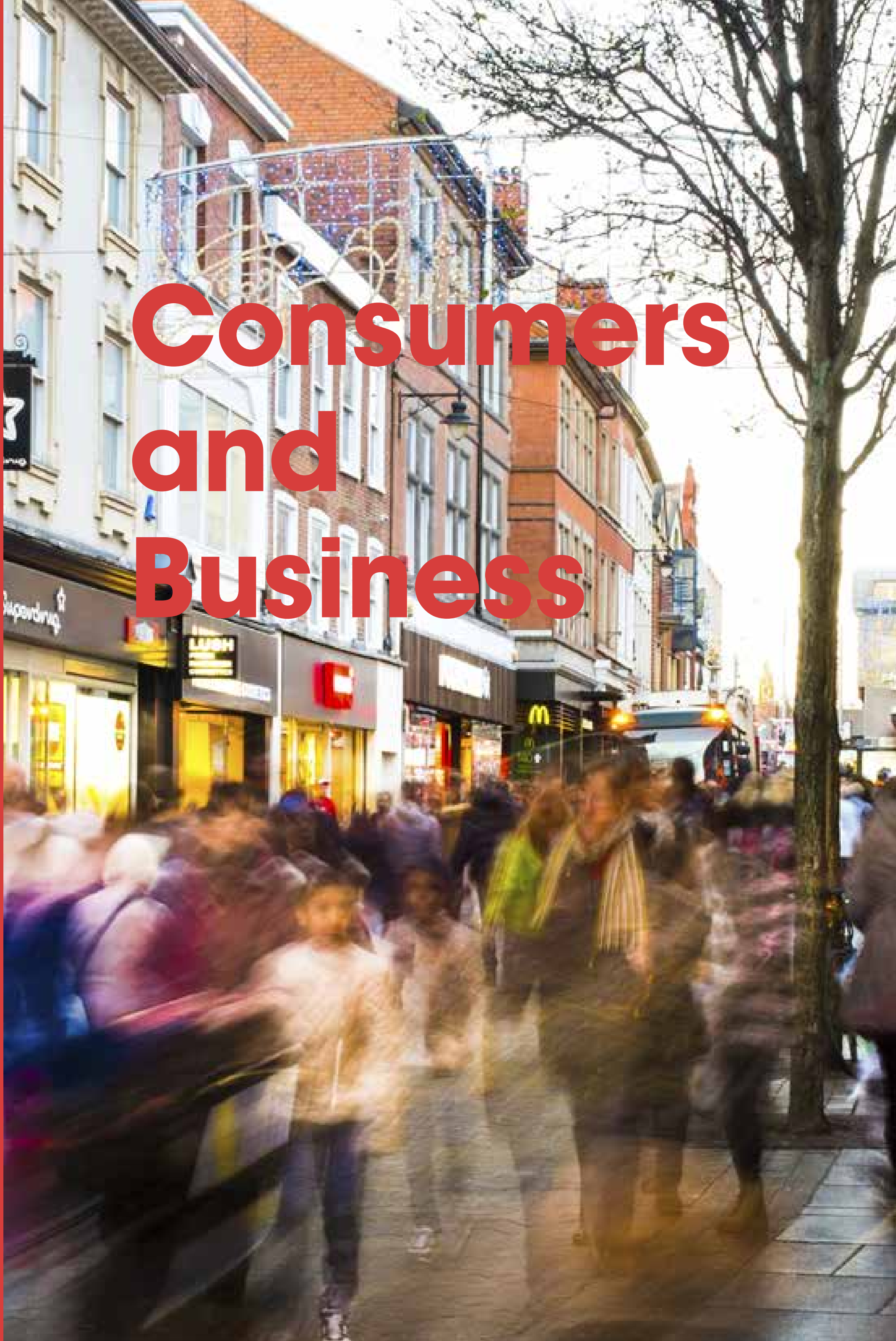
For full results, reports and slides,
go to **www.ipsosglobaltrends.com**

The British think 24% of the population are immigrants – which is nearly twice the real figure of 13%[36]

Young adults from overseas mostly see Britons as ‘polite and good mannered’ (46%) and ‘educated and skilled’ (37%)

‘Drinking too much’ (27%) and ‘having bad eating habits’ (23%) are our less positive traits[37]

Consumers and Business



We’re all biased now: behaviour change in 2014

by **Oliver Sweet**
Head of Ethnography
Ipsos Marketing

The excitement of the World Cup this year had people irrationally hoping that a small, underperforming nation would surprise the world and receive the footballing crown. It’s the kind of logical fallacy to which every football fan falls victim, and it is one of the rules of the beautiful game that means we keep supporting teams that have no hope. After all, someone needs to support Wales.

But there’s another irrationality that football fans hate; cheating footballers. Why do footballers cheat when 100 million people are watching a slow motion replay of their clear and blatant actions? Because footballers are also human, and they fall foul to **behavioural biases** just like the rest of us. The fast thinking, instinctive part of the footballer’s brain, the very part that makes them talented, also makes them fallible. Acknowledging this, FIFA introduced a very simple behavioural intervention this year – a line drawn on the pitch with 'disappearing foam', that stopped footballers creeping forward at a free kick. The intervention worked so well because it was a simple **nudge**, and they didn't once step over the line.

One of the biggest shifts in the world of research over the last decade has been the increased focus on the unconcious in decision making as we understand and categorise our behavioural biases, via behavioural economics. This categorisation is helping us understand why we behave the way we do; because we don't always understand it ourselves. Evidence clearly suggests that there is a fast part to our brain (System 1 to use Kahneman's language), that likes to act without waiting for justification, and a slower part to our brain that seeks to report what we have just done to the wider world (System 2).

Let's think about this in terms of journalism; journalists are your System 2 brain – thoughtful, but highly selective. Your System 2 brain thinks about life, pontificates a bit and then realises that it needs to report what's just happened. It then chooses which story to report on, while discarding numerous others, and then takes an angle on how to report the news. Indeed, you might even create two or three different versions of the same event depending on the situation, such as "I didn't take my medication because I forgot," to the doctor, or "I didn't take my medication because I don't think it will work," to friends. Meanwhile your System , fast thinking brain, is just 'doing'.

Away from football in 2014, the Scottish referendum was awash with behavioural biases. First of all, the question

was amended on our recommendation from '*Do you agree* that Scotland should be an independent nation?' to '*Should* Scotland be an independent nation?' because of the inherently leading opener in the initial version. Once the question was set, the 'No' campaign rightly changed their name to Better Together, as people don't like to cast a 'no' vote. This rebranding helpfully tapped into the **status quo bias** – our tendency to perceive any change from an established state or baseline as a loss. The Better Together camp also played heavily on **loss aversion**. The campaign message was that Scotland had a lot to lose by voting for independence, and the message hit a particular nerve when the Scots were told they would lose their currency.

The 'Yes' campaign were pulling on **identity biases** wherever they could, most strongly on **in-group bias** to unite Scotland against 'others'. Salmond's identity politics meant he had to draw a line between us and them, and when he painted 'them' as Westminster politicos his message resonated with the Scottish electorate.

Outside of politics, advertising agencies instinctively 'get' behavioural economics. Dior recently launched a line of comfy shoes. Fighting the prevailing belief that most trainer-type shoes are mass produced in large factories abroad, potentially under poor labour conditions, Dior used the **effort heuristic** to increase the perceived value of the shoe. The advert shows the finest craftsmen in Paris carefully placing the stitches and beads with exacting precision, the soles being moulded by engineers, and even the laces being hand crocheted. With Dior, you are buying effort with every shoe.

Of course the behavioural sciences do not just apply to communications. In fact a key message in behavioural change programmes is that communications do not work on their own. They are far more effective if linked to changes in the physical environment, particularly when applied to product usage and design. Financial services providers used design to create an **affect heuristic** by allowing customers to put a picture of their loved ones on their credit cards, in an attempt to induce an emotional connection when spending. Supermarkets have used the principles of **reciprocity** to encourage people to spend more time in store. Consumer goods companies are using behaviour change principles in laundry, personal care, and even with air fresheners.

'Vaping shops', the latest attempt to create an experience through **social incentives** and **social norms**, arrived in 2014 in an attempt to make e-cigarettes more 'normal'. They are a place for people to go, where people conform to the same identity, reinforcing each other's 'vaping'. Quitting smoking should be relatively straightforward in a rational, logical sense. However, smokers aren't yet taken with e-cigarettes as a suitable substitute: over two thirds of e-cigarette smokers still smoke 'real' cigarettes. Smoking is not just an addiction, but also highly habitual. After a few years of smoking, it is the associations, actions and mannerisms we crave more than the drug itself, and let's be frank, the smoker 'scene' for e-cigarettes doesn't make you part of the cool club.

In every field our behavioural biases are now studied, explored and, in many cases, exploited, and this is set to continue in 2015 and beyond.

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What the recession did to the workplace: what's been gained and lost in corporate Britain

by **Jonathan Nicholls**
Head of Employee Research
Ipsos Loyalty

The effects of the late-noughties recession are still being felt across society today, in terms of depressed real wages and pessimism about the future for young people. But what impact has it had on the workplace?

Our companies have changed. In the eyes of their employees, companies have become more technically proficient at managing their staff. This is a good and rational response to recessionary times. But it has not garnered them any thanks: employees just don't seem inspired and supported by what their companies have become. This can only store up problems for companies over the longer term, when those companies will most need engaged and committed employees to help them rebuild through the recovery.

This conclusion comes from our recent analysis of our Representative Employee Data (RED) database of organisation benchmarks, spanning back to pre-recession 2006. Using this, we've been able to start unpicking what happened to the UK workplace from 2006 to 2012.

What is the legacy of the recession? Looking at issues like leadership, staff engagement, wellbeing, change and innovation, we've identified some interesting patterns in the data that suggest the recession really has changed the workplace in some key – and potentially worrying – respects.

Perhaps unsurprisingly, between 2006 and 2009, employees became far more downbeat about most aspects of how their companies were working. For instance:

- We looked at key measures like how the company was seen to manage change, how well the company motivated its employees, whether the company was interested in their wellbeing, and whether employees felt they were being developed to their full potential. All of these fell by nearly a fifth.

- We also looked at employee perceptions of how well their line manager worked with them (setting a good example, delegating well, organising the work of the team, and so on). The proportion of employees who felt their line manager was doing a good job fell by around a sixth.

But at the same time, some key measures hardly fell at all. For instance, the proportion of people satisfied with their work-life balance only dipped marginally. Some measures

actually increased between 2006 and 2009: slightly more people were satisfied with the level of responsibility they were given; and there was a slight increase in the proportion of employees who felt their company's strategy was heading in the right direction.

So as the recession started to bite, some complex – and contradictory – patterns took hold. In particular, while employees became a bit more confident their company's strategy was right, they became much less confident that the company could deliver it – although, given the headwinds business has been facing, this could be seen as realistic.

It is even more interesting when you look at how those trends continued over the longer term. When you look at the trends between 2006 and the end of the recession in 2012 you find:

- In general, the recession focused businesses on success factors and better management. In 2012, compared with pre-recession, employees were more likely to feel encouraged to use their initiative, to report that they had clear objectives, and to find the performance appraisal process useful.

- Some measures fell and stayed low. By and large, the measures that fell most in 2009 didn't bounce back. Employee confidence in how their companies managed change, showed an interest in their well-being and developed their potential remained around the levels it fell to in 2009, reflecting tougher times.

So what to make of all this? The workplace remains different from pre-recession. Despite having to manage challenging times and difficult messages, line managers seem to have held their own, and to have even improved some of the key tasks of staff management – objective setting, appraisals, and encouraging their staff to take the lead. As a response to tough times, this looks good: UK businesses are managing their people better.

But, while the operational skills of good management seem to have improved, this has been at a cost. Some of the things that really affect individuals' sense of commitment to their companies – their confidence that change is being well managed, their sense that their company is investing in their wellbeing and potential, their feelings of motivation – have all fallen fast and stayed well below their pre-recession levels. The recession seems to have made companies more technically competent in how they manage, while becoming less inspirational, human and engaging in how they lead.

More effective management is certainly a good short-term response to tough times. But as the economy starts to pick up, there is an inspiration-deficit compared with 2006. One question for leaders to reflect on is why this is happening: is it that in tough times, leaders feel their companies need to focus more on the nuts and bolts, and the pounds and pence rather than the big vision? Is it that they're just trying to get through the quarter? Or perhaps it's hard to be inspiring when they feel their own futures are so uncertain?

A more important question for them to focus on is: which of these trends will 'win' – and will the benefits of better management be offset by a loss of employee belief in where their companies and their careers are heading? Companies certainly need to keep this under review: the question we

– and they – should ask is whether this inspiration-deficit is sustainable over the longer term?

The Ipsos RED database provides benchmark data for over 100 measures of organisational success from over 10,000 employees across the country. It is refreshed regularly: the 2014/15 data is due imminently, and we will be examining this to see if the trends we have identified here have continued as the recovery from recession has picked up pace. Further analysis will be published at www.ipsos-mori.com/employeeresearch as it becomes available.

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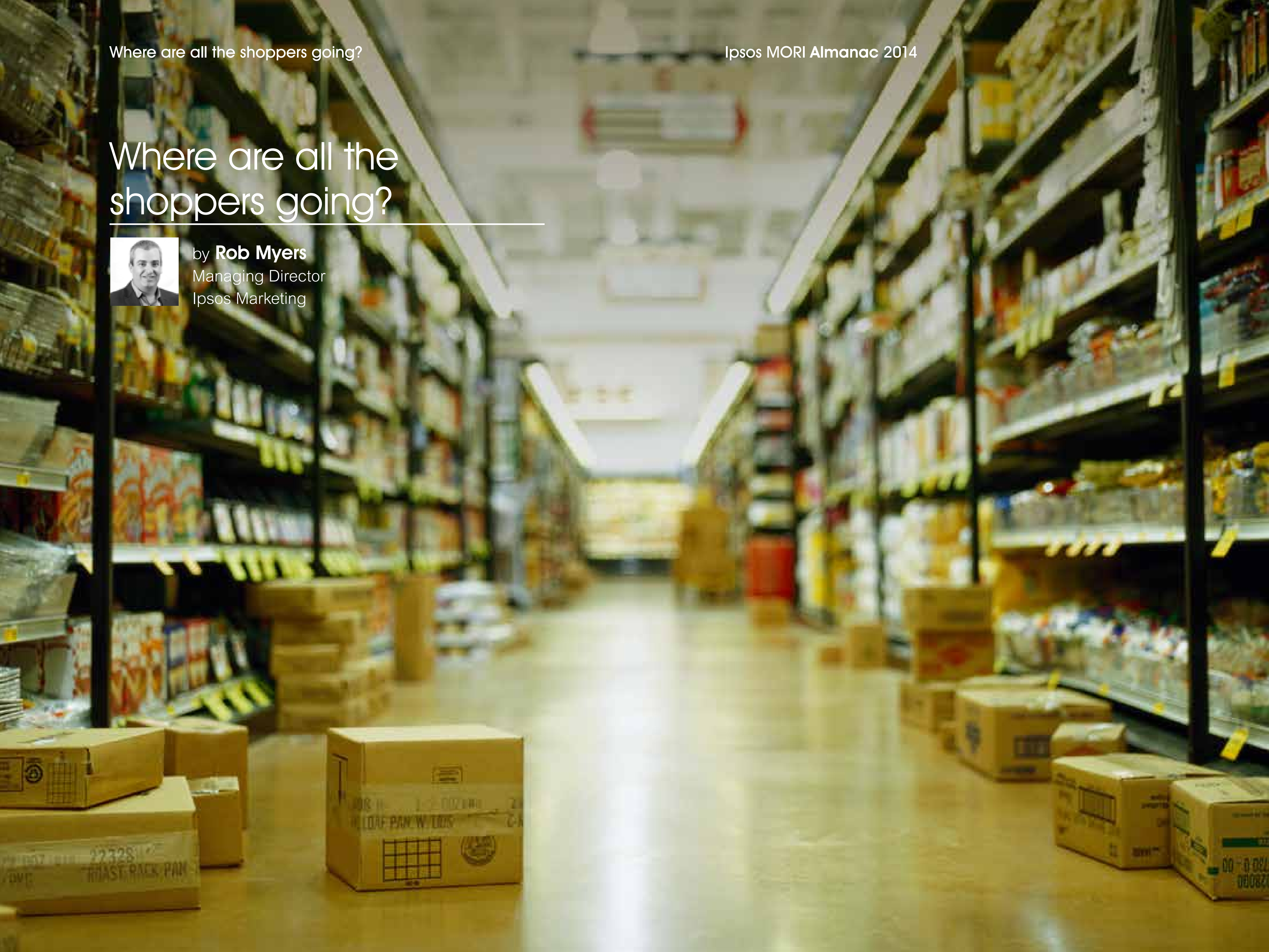

Where are all the shoppers going?

by **Rob Myers**
Managing Director
Ipsos Marketing

Until recently, Tesco was the bellwether of the UK grocery industry, helped by a sophisticated loyalty and customer segmentation programme powered by Dunnhumby. Ironically today, in the era of the 'Big Data revolution', the use of data and science to drive customer loyalty was clearly not enough – or wasn't used effectively.

What Tesco (along with the other big supermarket chains) failed to anticipate was the willingness of shoppers to sacrifice their traditional loyalty for better prices and simplicity. Is it any wonder, in this age of shrinking real wages, consumers are voting with their wallets? Have we witnessed a permanent shift away from endless choice in favour of pragmatic consumerism?

The privately owned German discount powerhouses Aldi and Lidl have stolen a march on their bigger competitors by keeping things simple. How many different types of ketchup do you really need? The Ipsos MORI Global Trends Survey revealed that 48% of Britons feel overwhelmed by the amount of choices they have as consumers. Where the discount retailers can negotiate on one variety for over 20 markets, the big four supermarkets push 20 lines in just one store. The exercise in efficiency doesn't stop with the limited range. Pick up a pack in Lidl and you'll see it's covered in multiple barcodes, reducing the amount of time it takes to scan, pay and leave the store. Less choice, less money, less time, more profits.

Up until fairly recently, Aldi was focused on the lower income demographics in the North of England and the Midlands. But now the German discounters are

aggressively pursuing shoppers from all walks of life with media campaigns promoting price, quality and the idea of something for everyone.

Bill Clinton's campaign strategist, James Carville, coined the phrase "It's the economy stupid" during the 1992 US Presidential campaign. It would be easy to use the same logic for the UK grocery market today, but I believe it is overly simplistic. The current trends are driven by a combination of the economy and the convergence of a shopper's virtual world with their physical world. Over 70% of the UK population purchased something online in the past 12 months. The internet has changed the way we think about our shopping experience – it is now easier than ever to price compare at home or on the move with smartphones. Consciously and unconsciously we all ask ourselves, why would I pay more?

The world of grocery retail is still at the early stages of a major transformation. The continued growth of the online supermarkets, click and collect at pick-up points such as Doddle, or even your Tube station, convenient delivery options and more competitive pricing suggest that, in the end, the consumer will be the real winner. But which retailers will end up on top is still a long way from being decided.

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Making real time the right time

by **Phil Shaw**
Director
Ipsos ASI

2014 was the year when smartphone ownership hit the magic number – 60%. Users spend, on average, three hours a day looking at their phones, and for all businesses and public services, that screen is the place you need to be. Immediate access to content is expected at any time of the day or night.

In today's crowded media environment the potential appeal of communications that are more relevant, timely and personalised to the needs and interests of the individual is huge. The promise of 'real time' is to cut through the clutter of the information we all get daily, by engaging people on topics that they're already interested in because, if done well, the brand/message becomes the content that people are discussing.

But is the increasing focus on immediate real time in danger of missing the point? The primary objective should be to reach people at the right time, in the moments that really matter: the right content at the right point on the purchase or decision journey. Real time marketing can play an important role but should be seen as *a* tactic, not *the* tactic to deliver relevant content to people at the moments of greatest need and influence.

With every trending celebrity story or significant sporting event, a flood of brands start publishing content on social media in an attempt to make the most of the unfolding drama. But just as clicking on a banner is no longer a novelty, neither is seeing brands marketing around live events. Real time can contribute to 'clutter' too, and brands that crowbar themselves into events with which they have no obvious relevance only risk adding to this, and being blocked or unfollowed.

Instead, the best real time communication goes further and uses data to reach people with relevant content at the right moment.

Our client, Birds Eye, recently ran a campaign in which they showed online ads to people between 5pm and 11pm, when they were most likely to be hungry and in the mood for a fish finger sandwich.

We used mobile to survey our panel between these times and asked people whether they were hungry or not. The hypothesis that reaching people in the right 'need state' is more likely to lead to activation was confirmed.

By replacing the digital ads our panellists normally see with our clients' ads, while they browse the web as normal – not in a research environment – we can test ads in their natural state, in real time. This is vital for online ads that are intended to have long-term, brand building and equity impact, rather than simply drive a direct response.

43% of hungry people who saw the ad said they'd buy Birds Eye fish fingers next time they shopped, compared with 33% of hungry people who didn't see it.

The approach shows the potential for long-term impact as well as immediate impact: among people who were not hungry, 17% of those who saw the ad said that they would eat fish fingers more often compared with 6% who were not exposed to the ad.

Innovative marketing requires innovative research and the challenge for researchers is also to reach people at the right time. At Ipsos we're increasingly using mobile to enable consumers to tell us about experiences as they happen – so we can measure the impact of advertising, messaging, word of mouth and point of sale and get closer to the moment of truth.

The key to making 'real time' and all forms of marketing a success is to develop creative ideas that are true to the brand and founded on insights that resonate and inspire – and to use data driven approaches to ensure that they are executed and delivered at the right time.

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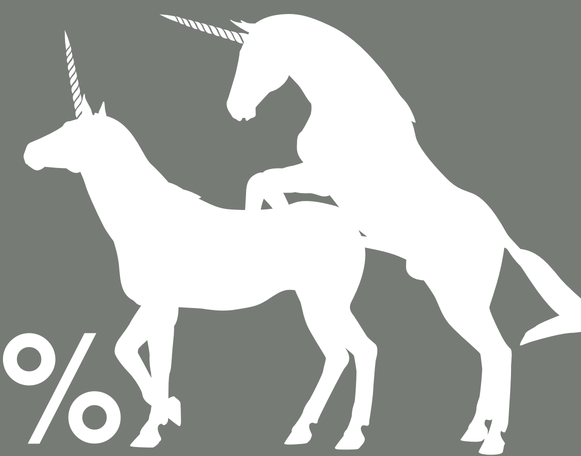

59%

of people across the world agree that 'the internet is making young people's expectations about sex unrealistic' [38]

An emotional year in adland

by **Jon Harper**
Director
Ipsos ASI

One of the long-term structural changes in economics, communications, psychology and research has been an increased understanding of the importance of 'emotion' and instinctive unconscious decision-making.

In advertising it is all-conquering. It also has multiple meanings and definitions. Do we mean System 1 or System 2, engagement, salience, resonance, physiological reactions, emotional priming or emotional brand building, or all of the above?

We think you need to consider all of these concepts when evaluating a campaign, communication or advert. But we should remember that, ultimately, an emotional ad isn't one we classify, it is one people have a response to. That should be the final arbiter of success or failure when judging creative work's ability to deliver those elusive and much sought-after emotional reactions.

So how did the debate play out this year? As this is adland we have license to use exaggeration and simplification to emphasise a point. There is a fundamental disagreement between two warring camps – those whose jobs and reputations rely on ads being creative, popular and well received; and those whose jobs and reputations rely on selling their product. The first group believe it is simply a case of 'be emotional and the ROI will follow'. The second group are more 'rational' in their approach – they want to show how their product works and why it would be useful to their target audience.

Are these seemingly diametrically opposed factions reconcilable? Les Binet and Peter Field's comprehensive interrogation, 'The Long and the Short of it', provides an answer. Through meta-analysis of the short and long-term effects of hundreds of campaigns, Binet and Field showed that rational messaging is great at delivering short-term effects. However, they are less successful in delivering more sustained effects that benefit brands in the longer term.

Conversely, emotional campaigns often take a while to have as big an impact, but work in the long run via 'emotional priming'. Binet and Field also suggest that whilst most campaigns use both rational and emotional approaches, those campaigns whose primary focus was emotional were more effective across all metrics.

So emotional appeal wins and is essential? Not quite. There is an important caveat. If you are going to go with

an emotional priming campaign, you have to have a good activation strategy running alongside. This gets immediate impact until the long term emotional effect comes through (and keeps the 'rational' team happy).

Some emotional winners of 2014

Throughout the year we have been evaluating campaigns to see which ads truly hit the emotional high spots. By using neuroscience techniques, such as facial coding, implicit reaction and biometrics, we can evaluate the emotional aspect more sensitively than traditional measures of recall and persuasion.

Apple – emotional involvement

This year's iPhone 5s campaign is a great example of 'emotional involvement'. This genre of advertising works by stirring emotions in people and/or by being well liked. It is looking to generate emotional engagement with the

Apple - iPhone 5s - TV Ad - Parenthood. www.youtube.com/watch?v=fmTpgSMJ96c campaign so that positive image and associations are transferred across to the brand. Of course, there is a long purchase cycle on phones, so the primary role for this ad is to warm people up to Apple and the iPhone.

In our testing, the people for whom this story is most personally relevant, parents, experience a much bigger spike of engagement at the beginning, which then develops throughout. It is vital that the brand is connected to the things the target audience really care about. Given this sustained emotional engagement journey, it is no surprise that the campaign achieved 16% uplift in consideration for the brand among parents, compared to those not exposed to the advertising.

Emotional fame – a formula for success?

We have also identified three great examples of 'emotional fame' campaigns. They work by getting the brand talked about as people are inspired to share both the ad and their enthusiasm for it.

three - #SingItKitty - cat advert. www.youtube.com/watch?v=SXy6JElmgHU

This particular sub-set of emotional advertising is most likely to deliver very large business effects. The campaigns by McVitie's, 3 and Always stand out in this category.

The combination of cute cats and the pleasure of chocolate biscuits (McVitie's), silly, senseless, unfettered emotional joy and 80s feel good rock (3), or a thought-provoking

McVitie's Kitten TV Advert - Chocolate Digestives. www.youtube.com/watch?v=KOmIDhBDoww

Always #LikeAGirl. www.youtube.com/watch?v=XjJQBjWYDTs look at society's attitude to women (Always), all gave these campaigns huge re-transmission potential, in addition to the 'paid for' slots in traditional media.

This is of little value, however, if the work is not delivering the desired response for the brand. All the campaigns achieved this in their own way – with uplifts in brand saliency and purchase interest for McVitie's (emotional ads can do short term effects too!), brand consideration for 3 and, in the case of the Always social content, brand closeness among women and men.

John Lewis ends the year with an emotional high

As the year came to a conclusion, the much anticipated John Lewis seasonal effort was 'seeded' online to great effect before hitting TV screens. Our research showed they struck gold, gleaning an emotional response that comfortably out-performed last year's effort.

It intrigues from the first second, and takes the viewer on an emotional journey full of happiness and smiles, tinged

John Lewis – Monty the Penguin TV advert. www.youtube.com/watch?v=iccscUFY860

with sadness and concern, before rising to a crescendo of feel-good emotions. Monty the Penguin's search for 'real love' allows a child's imagination to run free with great effect – ultimately connecting to many of the things people really care about at Christmas.

People don't care that much about brands. But powerful, high quality creative material that elicits a genuine emotional response, can help overcome that indifference and deliver impressive outcomes. It means the work is more likely to be noticed, engaged with, shared and discussed. Beyond that, it will help to emotionally prime people's relationship with the brand.

Too many of us in adland are hung up with short-term pressures: brands and campaigns win when they think long-term.

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Your phone and your money

by **Suraya Randawa**
Director, Financial Services
Ipsos Loyalty

Our phones have become a device we are inseparable from, and 2015 may be the year they take the role of banker for millions. 2014 saw two developments which could finally take mobile payments to the broader public – Paym and Apple Pay. The majority of us have now been willingly or unwillingly co-opted into one of two technology ecosystems created by iOS and Android. But when it comes to paying via an app or Near Field Communications (NFC) on phones, 63% of British users say they want to wait until mobile payments are more established before considering them[39].

By next year the vast majority of British banks and building societies will have joined the Paym scheme, which lets you instantly transfer money to friends via your mobile for free. The Payments Council describes Paym as a "a world leading payment service"[40], with its Faster Payments facility and the service's widespread access.

However, most people have never heard of it – though at least 10% of under 35s have either used Paym or registered for the service[41].

Apple's mobile payment solution, Apple Pay is not expected to arrive in the UK until 2015 or later[42]. But with 49% of British adult smartphone owners using iPhones[43], Apple already has a captive audience.

You probably haven't come across Zapp yet, but you will. Launching in 2015, five leading banks have already signed up to it, as have the leading payment service providers and some key retail partners with a base of 35 million customers, providing another way to pay with your mobile.

We believe 2015 is the year mobile payments may finally take off. First, more and more of us are using our mobiles to manage our money. The average weekly banking app usage for the UK's largest five banks was 18.6 million times, up from 9.1 million times in 2012[44]. Second, more of us are also spending on websites with our phones and tablets, with mobile commerce accounting for 36% of UK e-retail sales[45]. Third, many of us are already using contactless payments in Britain, with an increase of over 200% spent on contactless credit and debit cards from 2013 to 2014 – six contactless payments are made every second in the UK[46]. In September 2014, Transport for London opened up its network to contactless debit and credit cards, banning cash from buses.

What is interesting to us is whether the companies behind these initiatives have fully considered all the tools of behaviour change at their disposal – consumers may

have the capability (a smartphone), but do they have the motivation to make the change? Is it that much easier than just putting a card in a slot and entering a PIN?

Simply telling people about the option to pay by phone will not work on its own – it has to fulfil a real (speed, simplicity) or emotional need, and these must overcome people's dislike of entering their payment details online, even if it's only once. Where benefits and ease of use are clear, people sign up in their millions – as taxi apps like Uber and Hailo in major cities show.

Either way, our phones will become even more indispensable in 2015.

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Has mobile killed the radio star?

by **John Carroll**
Senior Director
Ipsos MediaCT

The decline of radio listening has been predicted for decades. The arrival of television, games consoles, CDs, personal stereos, music television, iTunes, iPod, Pandora and Spotify cover several generations of threat. Today, 'Is mobile killing radio?' adds another headline-grabbing threat. Is it finally true?

Certainly, the younger generation love their smartphones. Today, around nine in ten 15-24 year olds in the country have one, and they spend over three and a half hours on it

Who owns a smartphone?

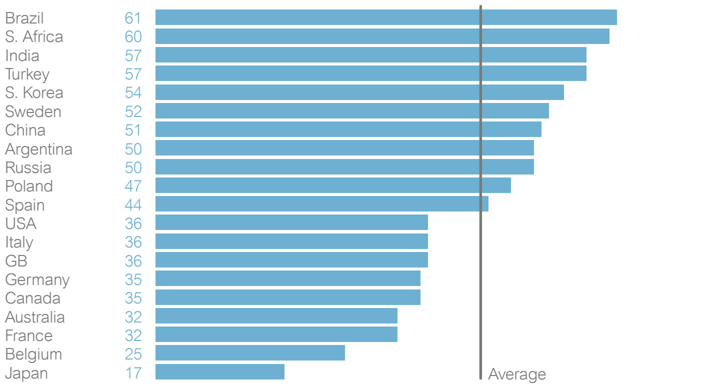
% owning smartphone by gender and age

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	58%	89%	91%	79%	61%	39%	15%
Males	64%	88%	86%	79%	70%	48%	20%

Source: Ipsos MORI Tech Tracker. Base: circa 4,000 GB adults aged 15+: Q4 2013 / Q1 / Q2/ Q3 2014

People love listening to music on their mobile devices

% Which, if any, of the following activities do you use your mobile phone for? Listening to music

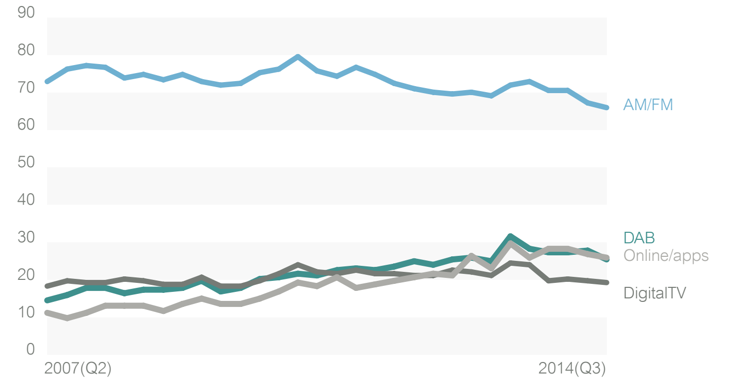


Source: Ipsos MORI Global Trends Survey. Base: 16,167 adults aged 16-64 across 20 countries, 1-15 Oct 2013

each day[47]. The young love listening to music on their mobile devices too. The Ipsos MORI Global Trends Survey reports that 44% of adults across the 20 countries in the study listen to music on their smartphone, with Brazil being the highest at 61%. With the likes of iTunes and Spotify apps, our mobiles have greatly enhanced access to music.

The 15-24 age group has long been attractive for radio advertisers and media brands to target. Whilst tuning in to commercial stations makes up the majority of their radio listening, this group is increasingly elusive to reach through traditional media channels. Just over £0.5bn is forecast to be spent on radio advertising in the UK in 2014; an annual increase of 6.8% that will make it the sector's best

Digital radio listening – 15-24s



Source: RAJAR, diary data on radio listening. Base: c.25,000 adults aged 15+

performance for over ten years[48]. However, by the end of this year in the US, more money will be spent on mobile phone advertising than on radio, newspaper and magazine advertising combined[49]. The ubiquity of the mobile phone, and in particular the iPhone's arrival in 2007, has changed both listeners' behaviour and advertisers' spending.

Yet radio has survived because radio stations have recognised that the mobile phone has become an increasingly powerful device that can connect them to their listeners. Social media are now well established as very popular ways for listeners to interact with their favourite radio stations and presenters, and vice-versa. However, they can potentially disconnect them too.

Radio's switch to a digital format also changed many things – but not always as quickly as initially forecast. Back in 2009, the government published its Digital Britain report, which set a target date of 2013 for the digital share of radio listening in the UK to exceed 50%. This would then trigger a full digital switchover in 2015, meaning you would no longer be able to listen to national stations on FM. Since then, the growth of digital across the UK has been steady but slow and, with the current digital listening share at 38%, the switchover date may now be as far away as 2020.

But for 15-24s, online and via mobile are now the most popular form of radio listening, even exceeding DAB radio. This group's digital share of listening is also higher than that of the total population at 44%. The arrival of the RadioPlayer app has enhanced radio's accessibility to smartphone users.

One of the fascinating changes in media over the last decades has been how, rather than new formats destroying old ones, a more complex and much more diverse landscape has been created, with old elements persisting or thriving for longer than pundits and trends experts predict. The habits of these 15-24 year olds, such as mobile phone radio listening, suggest that digital and mobile services have not killed the radio. They are nourishing it.

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Half of Britons

think Boris Johnson standing as an MP increases the Conservatives' chances next year[50]

The death of TV? Video anytime

by **Beckie Goodfield**
Director
Ipsos MediaCT

& **Nick Watson**
Associate Director
Ipsos MediaCT

The number of British adults streaming TV programmes or movies reached record highs in 2014, fuelled by enhanced connectivity, technological innovation and increased affordability. Tablets and smartphones have become increasingly commonplace, giving content whenever and wherever we like. A whole generation of children in this country has grown up with no comprehension of video being restricted to TV – they can watch it anywhere, anytime.

But what does this mean for TV as *we* knew it? Is this part of an 'inevitable and impending doom for traditional television'? Is the television set redundant? In fact, 87% of our TV viewing is still 'live'[51]. Many shows, such as Gogglebox, X Factor and Sherlock have become key viewing 'events' for live TV. Viewers tune in live (or near live) to share experiences and to ensure they can contribute to discussions, both online and in real life. During the US premiere of season five of smash hit drama ‘The Walking Dead’ the top ten trending Twitter topics were about the show. Under these circumstances, fans must keep up to avoid being left out, left in the dark, or – even worse – left disappointed by frustrating spoilers (one of our colleagues spent a day avoiding all news outlets, as he had missed the Great British Bake Off the night before!). There is still no better way to do this than through live TV and, while 2014 brought key online successes, Britons were more likely to cite live TV as ‘more of an event’ than they did a year ago in 2013[52].

Television has embraced new forms of technology. Internet connected TVs can now be found in the homes of almost one in five British adults and this figure is growing rapidly[53]. This provides unprecedented opportunity for online viewing via the TV set, which remains key to audience engagement with video. Even when viewing video on demand (VOD), the television set continues to be audiences’ preferred device, as the demand for a shared, large screen experience remains strong (even if many of us are looking at smartphones and tablets simultaneously!).

Captivating and inspiring content that people want to seek out and watch, regardless of how and where it is served, is the key to the success of both traditional television and VOD. We know that when people choose content providers, such as Sky, BBC or Netflix, the range and quality of content is by far the most important factor[54]. This is a point clearly not lost on Netflix, who is reported to have spent circa $400 million on its own exclusive, original content in 2014 – a classic example of distributors becoming content creators, as roles overlap and diversify in a flattened media landscape.

Although commentators often pit them against each other, viewers use traditional television and VOD as complementary and interlinked services that simply fulfil their need for high quality content, when and where it suits them.

The future looks as complex as the present, but one thing is certain: video will continue to be in demand, and TV is far from dead.

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Emerging techniques – a research renaissance

by **Claire Emes**
Head of Digital
Ipsos MORI

Our business of researching people's attitudes and behaviours is changing. We have witnessed a revolution in consumer behaviour driven by our changing relationship with technology. Today, three-quarters of us say we couldn't imagine life without the internet and the three in five of us who now own a smartphone would rather give up any other device, including our TV!

It's these same trends that are enabling us, as researchers, to uncover fresh insights. Mobile and wearable technologies are allowing us to be 'in the moment' with consumers before they post-rationalise or forget their experiences. We can gather useful contextual information via photos, videos and digital 'breadcrumbs'. By combining these technologies with a greater understanding of human psychology, we can not only capture, but also understand, people's actions and motivations more accurately and in greater context than ever before.

We now have more ways than ever to understand human behaviour, but which are 'right'?

Right time, right place

Mobile research (i.e. using people's smartphones) allows us to conduct research 'in the moment', at the point of the experience, which is particularly useful when we're examining frequently performed, habitual or low-salience behaviours. Could you accurately tell me the cost of your last supermarket shop or how many hours you spent watching TV last week? If you are like most people, probably not. In retrospective reports of behaviour, people often resort to generic estimates. In a recent study on video on demand (VOD), for example, we found that respondents who were using an in-the-moment mobile diary reported watching an extra hour's more VOD content per week than those who completed a standard recall study.

Recalling and articulating sensory experiences also poses a challenge for traditional research methods. By regularly adding an 'in the moment' mobile element into our product testing research, we've found people are better able to differentiate between products. It also allows respondents to not only tell us what they think of product features but also show us via photos and video.

It's not what you say, it's what you do

As Oliver Sweet explains in his article, behavioural economics has taught us that there is a difference between people's reflexive and reflective modes of thought (Kahneman's System 1 and System 2).

Traditional techniques perhaps focus too much on people's reflective (rational, cognitive) responses to the detriment of the more reflexive (unconscious, intuitive) influences. Emerging techniques, such as neuroscience, ethnography and Big Data analytics, are allowing us to observe people's actual behaviours, access their unconscious mind and uncover some of the instinctive motivators behind people's decisions – the influences that they may not even be aware of.

By using a range of techniques, including ethnography, mobile diaries and Google Glass (which the participants soon forgot they were wearing), we enjoyed front row seats for the journey to motherhood – including joy, tears, awkward conversations, tired pictures, and an unmediated view of daily life. This project gave us a unique opportunity to understand this life-changing journey – a journey that's so often misinterpreted and over-glamorised by marketing and the media – showing us motherhood from all angles.

In 2014, we've generated some of our deepest insights by combining 'shiny new' tools with established craftsmanship. For example, partnering surveys with neuroscience techniques has given us a read of the conscious and unconscious response; and layering mobile diaries and wearables onto traditional ethnography has provided depth and breadth. With these techniques often raising as many questions as they answer, our core skill – adding the why to the what, when and where of human behaviour – is more valuable than ever.

To get in touch with Claire,
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Globally, 65% of people agree that 'people across the world have more things in common than things that make them different'[55]

(except the French and Japanese)

End notes

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23. Ipsos MORI telephone interviewed a representative sample of 1,002 adults aged 18+ across Great Britain between 11th – 14th October 2014. Data are weighted to match the profile of the population.

24. 11,527 interviews were conducted between 12 – 26 August 2014 in 14 countries - Australia, Belgium, Canada, France,

Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, Great Britain and the United States of America. In the US and Canada respondents are aged 18-64, and 16-64 in all other countries. Approximately 1000+ individuals were surveyed in Australia, Canada, France, Germany, Italy, Japan, Spain, Great Britain and the United States of America. Approximately 500+ individuals were surveyed in the remaining countries. Data are weighted to match the profile of the population.

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30. www.ipsos-mori.com/researchpublications/researcharchive/88/Political-Monitor-Satisfaction-Ratings-1997Present.aspx

31. Results are based on a survey of 1,026 respondents (adults aged 18+) conducted by telephone between 22nd October to 29th October 2014

32. Ipsos MORI conducted 1,001 interviews with a national representative sample of the British public aged between 16 and 75 years old between 26 June and 3 July 2014.

33. Ipsos MORI telephone interviewed a representative sample of 1,002 adults aged 18+ across Great Britain between 11 – 14 October 2014. Data are weighted to match the profile of the population.

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36. 11,527 interviews were conducted between 12 – 26 August 2014 in 14 countries - Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, Great Britain and the United States of America. In the US and Canada respondents are aged 18-64, and 16-64 in all other countries. Approximately 1000+ individuals were surveyed in Australia, Canada, France, Germany, Italy, Japan, Spain, Great Britain and the United States of America. Approximately 500+ individuals were surveyed in the remaining countries. Data are weighted to match the profile of the population.

37. Ipsos MORI conducted the fieldwork (between 18 December 2013 and 17 January 2014) with analysis and reporting carried out by In2Impact and the British Council. Data are weighted on gender and age to reflect the relevant population profiles.

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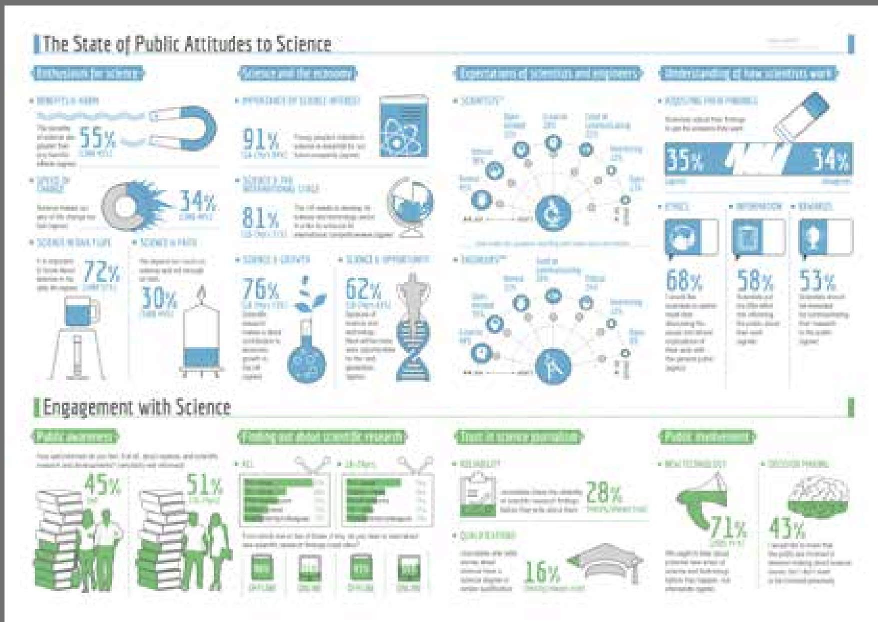
53. Ipsos MediaCT Technology Tracker, Q2 2014 (www.ipsos-mori.com/researchpublications/publications/1671/Ipsos-MediaCT-Tech-Tracker-Q2-2014.aspx)

54. Ipsos MediaCT MediaMoments, 2014

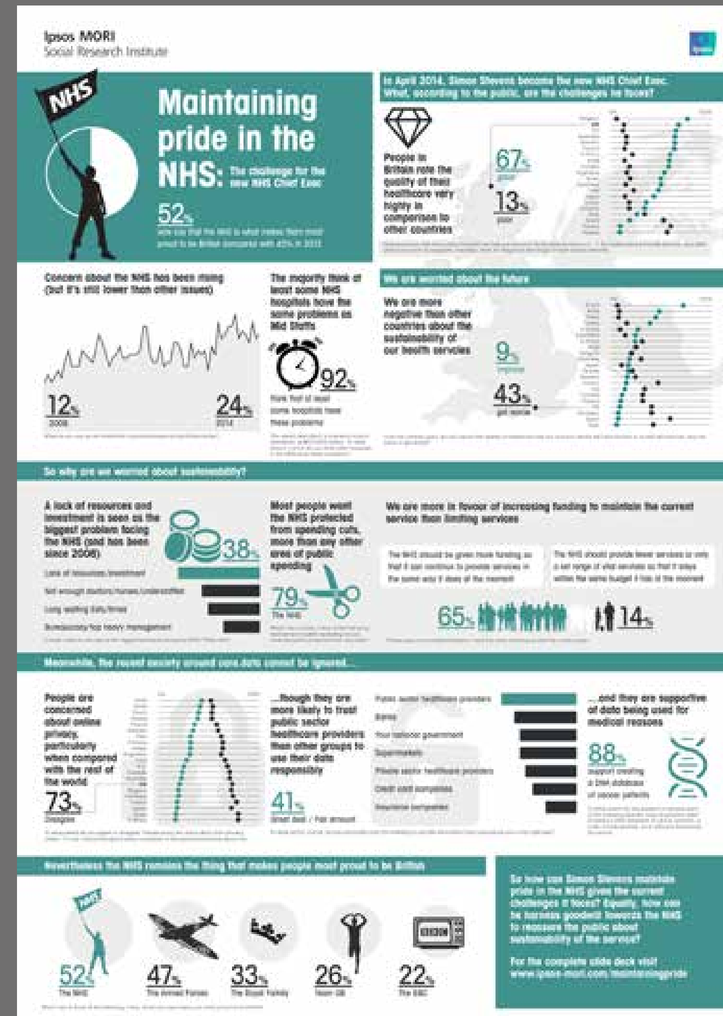
55. As 15 above

Some of our favourite infographics from 2014

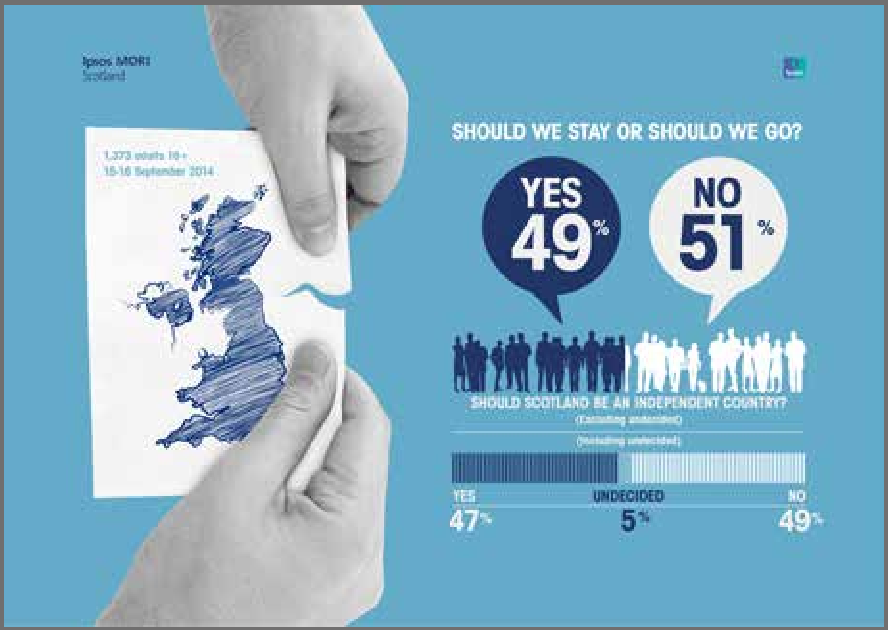
The following pages show a selection of snippets from some of our favourite infographics of 2014. To see them in their full glory, please go to the webpages listed below each one, or alternatively visit our data visualisation blog at: www.ipsos-mori.com/datafizz



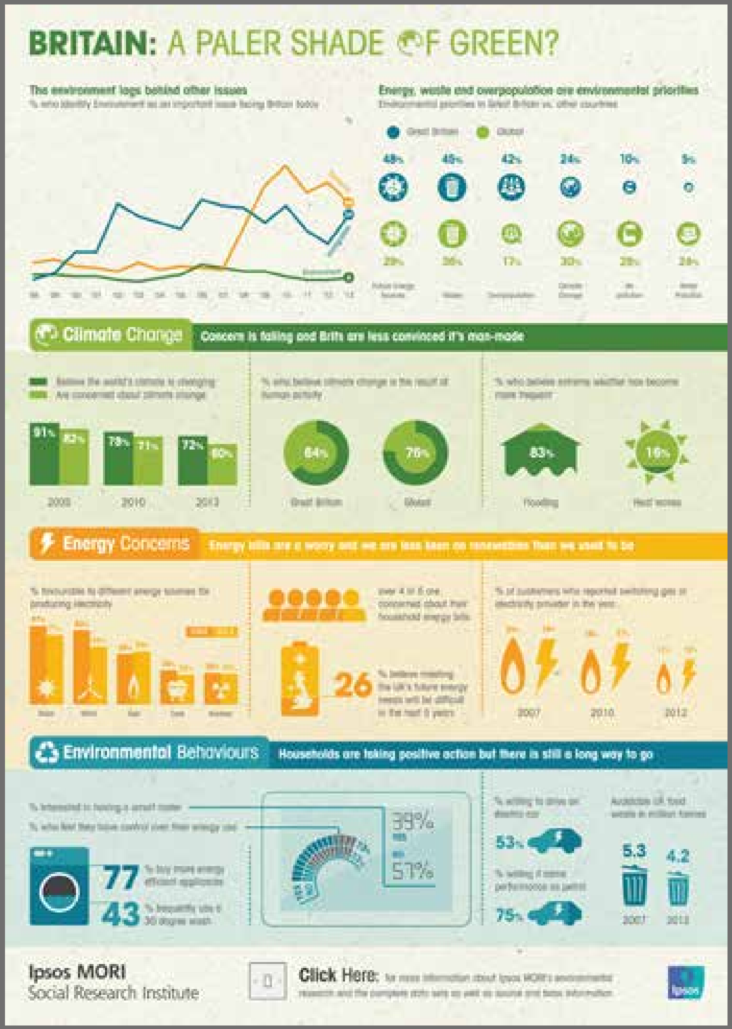
Public Attitudes to Science
Take a closer look at:
www.ipsos-mori.com/PAS2014



Maintaining pride in the NHS
Take a closer look at:
www.ipsos-mori.com/NHS2014



Ipsos MORI Scottish Referendum infographic
Take a closer look at:
www.ipsos-mori.com/referendum2014

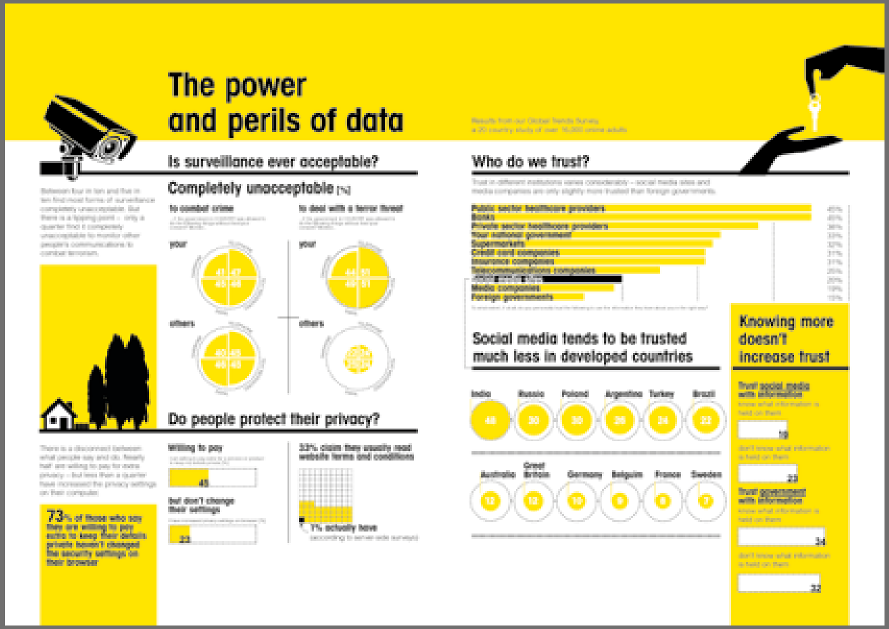


Britain: A paler shade of green
Take a closer look at:
www.ipsos-mori.com/environment2014

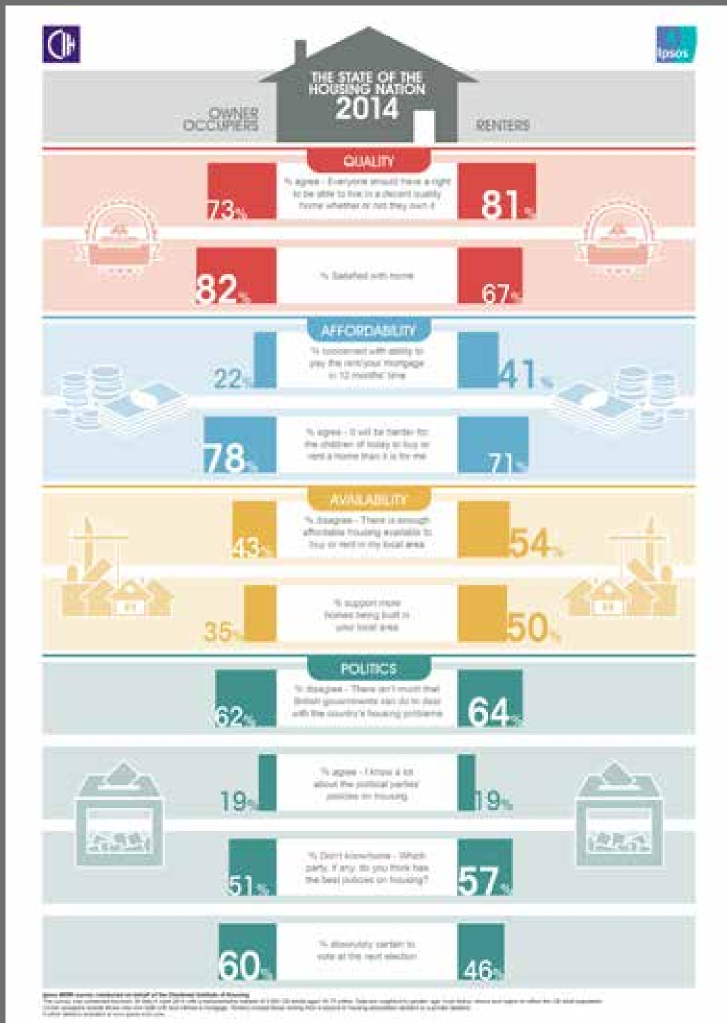
Ipsos MORI Perils of Perception
Take a closer look at:
www.ipsos-mori.com/perceptions2014

Ipsos Global Trends microsite
Take a closer look at:
www.ipsosglobaltrends.com

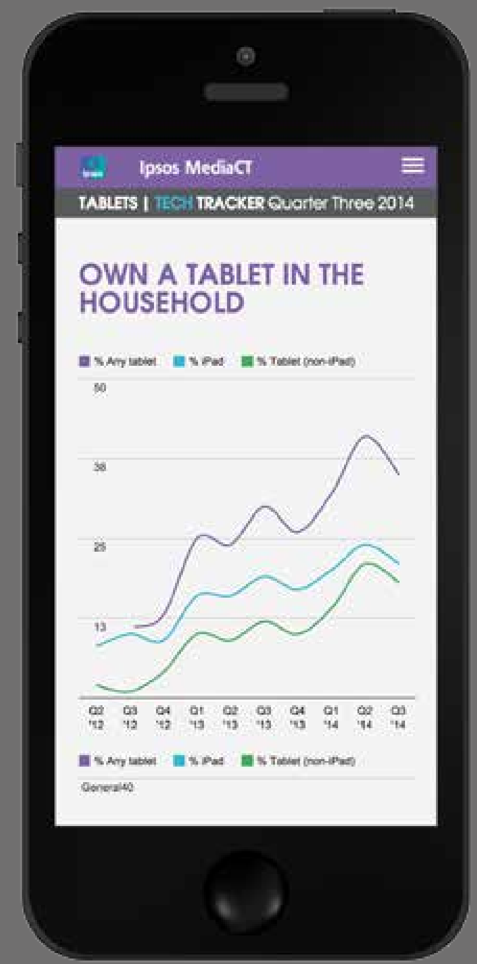
Joseph Roundtree Foundation animation
Poverty in the UK: The public's view
Take a closer look at: www.ipsos-mori.com/jrf



Understanding Society – The power and perils of data
Take a closer look at:
www.ipsos-mori.com/UnderstandingSociety



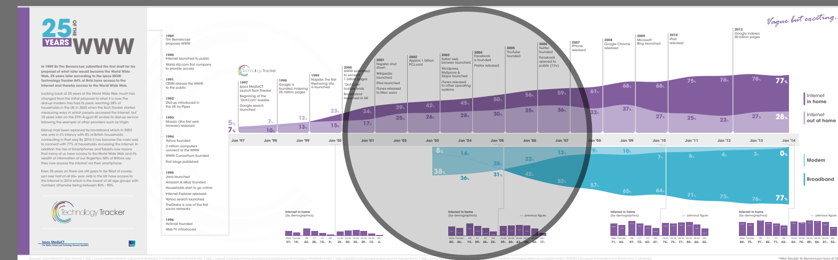
The State of the Housing Nation
Take a closer look at:
www.ipsos-mori.com/renters

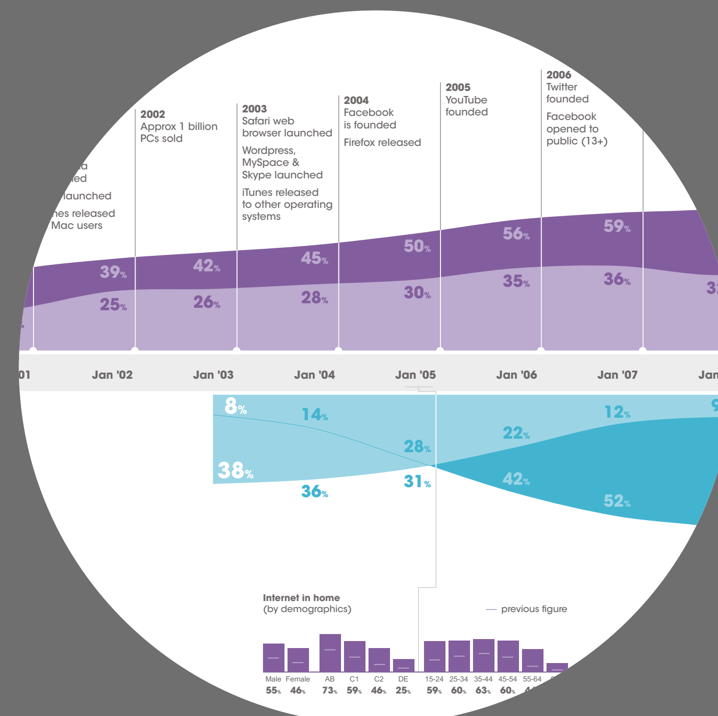


Ipsos MediaCT Tech Tracker microsite
Take a closer look at:
www.ipsos-mori.com/TechTracker2014

Ipsos MediaCT Business Elite BE:Barometer

Take a closer look at:
www.ipsos-mori.com/BE2014

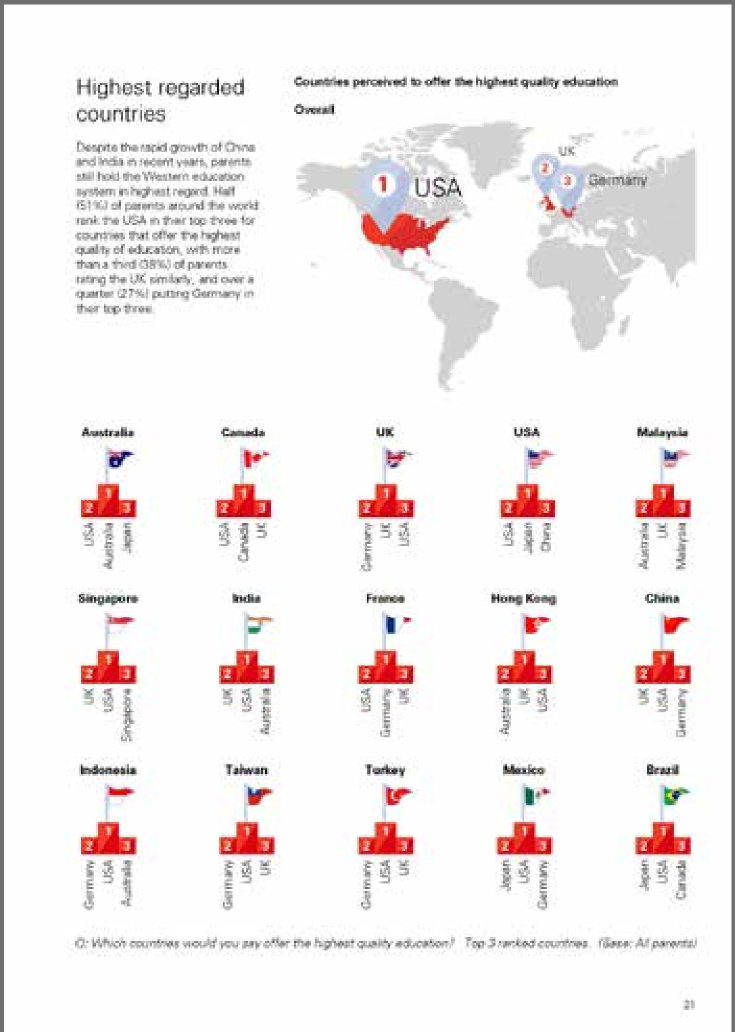




25 Years of the World Wide Web

Take a closer look at:
www.ipsos-mori.com/WWWat25

Bill and Melinda Gates Foundation infographic booklet
Take a closer look at:
www.ipsos-mori.com/BandMGates



HSBC – The value of education: Springboard for success
Take a closer look at:
www.ipsos-mori.com/springboard

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