



**TIMINGS  
CHANGED**

# Ipsos MORI Highlights

## March 2017

**Four in ten have confidence in Theresa May to get a good deal for Britain in Brexit negotiations, 10 points more than Cameron**

**As the EU turns 60, most EU citizens are unhappy with its direction (57%)**

**Support for independence rises in Scotland**

**Unemployment and corruption remain the top issue globally**

**Concern with the NHS at the highest level since 2002**

**86% of FTSE 500 firms say committed to equality – but 71% say they have no women on their boards**



Ipsos MORI

# WELCOME TO MARCH HIGHLIGHTS

This month sees the formal start to the UK leaving the EU. Economic optimism has fallen again. The public is more confident in the current Prime Minister getting a good deal than they were about David Cameron (44% v 32%), but as many as 52% agree with her “no deal is better than a bad deal”. We now face months of uncertainty, not least in Scotland where 50% this month say they would now vote for independence in a new referendum proposed by Nicola Sturgeon. Keeping everyone happy is going to be a tall order for Theresa May but only 7% of her voters are unhappy with her (compared to 52% of Labour voters who are dissatisfied with Jeremy Corbyn).

Currently the main concern about Brexit for consumers is rising prices (69%). When they look at the country as a whole currently the National Health Service (52%) is seen as more worrying. A reminder of how different the UK is from the rest of the world comes in our monthly “What worries the world” survey across the G20; elsewhere unemployment and corruption are the major concerns. In the UK concern about unemployment is at a historic low – with more people concerned about low wages.

Across the EU, our pan-European study for its 60<sup>th</sup> anniversary finds MOST of its citizens unhappy with its direction (57%) – even after the UK leaves it faces plenty of other challenges, although in the Netherlands, the populist surge ran out of steam this month in national elections, with our Ipsos colleagues undertaking highly accurate polling. As in Ireland, Poland and South Africa recently, Ipsos political polling was very accurate.



With International Women's Day this month we found 86% of the UK's 500 largest company board directors saying they are committed to gender equality – but 71% also say they have NO women on their boards at all! Across the world, 40% of women say they don't have equality in their country and one in five men and women think women are inferior to men, including almost half in India and Russia! So although most women say they have equality of opportunity, there is some way to go – as most organisations will agree.

Finally, never think you can be sure about the future – printed book sales rose last year, and e-book sales fell. The public still like reading the hard stuff, as our study for the Royal Society of Literature shows this month.

There's much more inside, including gaming, the housing crisis, the future of cities and more. Let us know what you think.

A handwritten signature in black ink that reads "ben page".

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# IPSOS MORI'S MARCH HIGHLIGHTS



## POLITICS

- Four in ten have confidence in May to get a good deal for Britain in Brexit negotiations
- Support for independence rises as Sturgeon announces plans a for second referendum
- Satisfaction with Hammond drops, as does economic optimism
- 60 years of 'Europe' – a success story?



## SOCIETY

- Three in four women around the world believe there are unequal rights in their country
- European perceptions of climate change
- Future Cities Dialogue
- Literature in Britain today



## HEALTH

- Concern with the NHS at the highest level since 2002
- Majority say the NHS' ability to deliver care is getting worse, and expect decline to continue



## INTERNATIONAL

- Unemployment remains the top issue globally
- Threat of waste water on clean water supplies



## MEDIA, BRANDS & COMMUNICATIONS

- The new faces of gaming
- #NotaJoke. Branded entertainment Oscar style



## ECONOMY & BUSINESS

- Captains of Industry are committed to championing diversity and inclusion in the workplace
- Leadership Connections 2017: HR driving business transformation



## HOUSING

- Captains join public in prioritising housing infrastructure



## OPINION

- Have we had enough of climate experts? Does it matter?
- Narrow band of "undecideds" will pick winner in Scotland
- City limits: what do we want from our future cities?

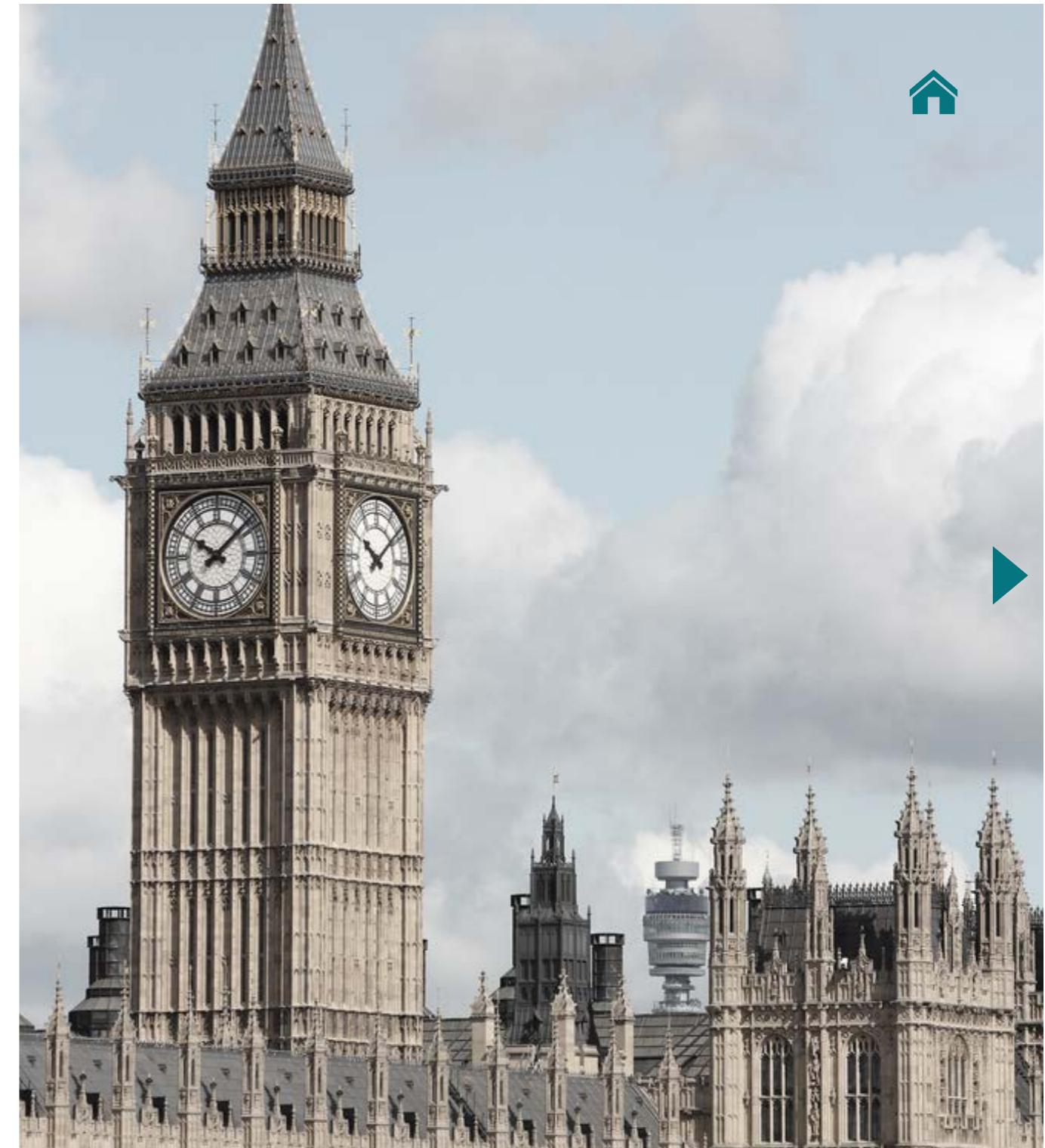


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# POLITICS



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# FOUR IN TEN HAVE CONFIDENCE IN MAY TO GET A GOOD DEAL FOR BRITAIN IN BREXIT NEGOTIATIONS



In the week that saw the Article 50 bill finally receive Royal Assent, the latest Ipsos MORI Political Monitor finds half of Britons say they don't have much confidence in Theresa May's ability to get a good deal for Britain in negotiations.

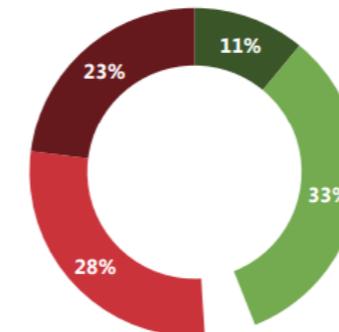
Key findings include:

- 44% have confidence in May to get a good deal for Britain in Brexit negotiations. However, there is more confidence in Mrs May than there was in David Cameron in his negotiations before the referendum. In February 2016 just one in three (34%) of the public had confidence in his ability to do so.
- When it comes to negotiating a deal, immigration control is key, with 61% saying it is essential or very important for the government to achieve full control over its immigration policy. This compares with 43% each who think staying in the single market or making no further contributions to the EU budget after we leave are very important.
- Despite these concerns a higher proportion of the public feel Mrs May is doing a good job (49%) at handling Britain's exit from the EU than a bad job (40%).

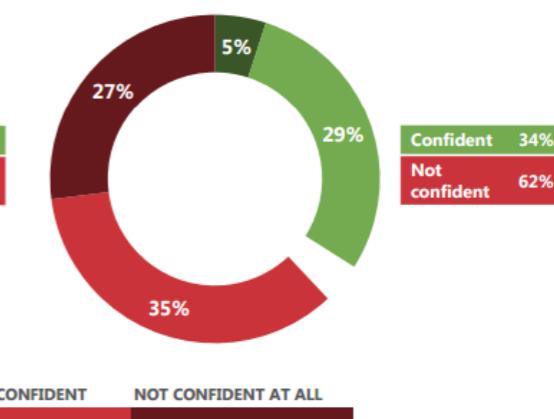
[Read more ...](#)

Please tell me how confident, if at all, you are that Theresa May will get a good deal for Britain in negotiations with other European Union leaders?

Theresa May, March 2017



David Cameron, February 2016



Base: 1,032 British adults 18+, 10th – 14th March 2017



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# SUPPORT FOR INDEPENDENCE RISES AS STURGEON ANNOUNCES PLANS A FOR SECOND REFERENDUM



As the UK government prepares to begin formal negotiations to leave the European Union and the SNP prepares for its forthcoming spring conference, our new poll for STV News shows voters split down the middle in their constitutional preference.

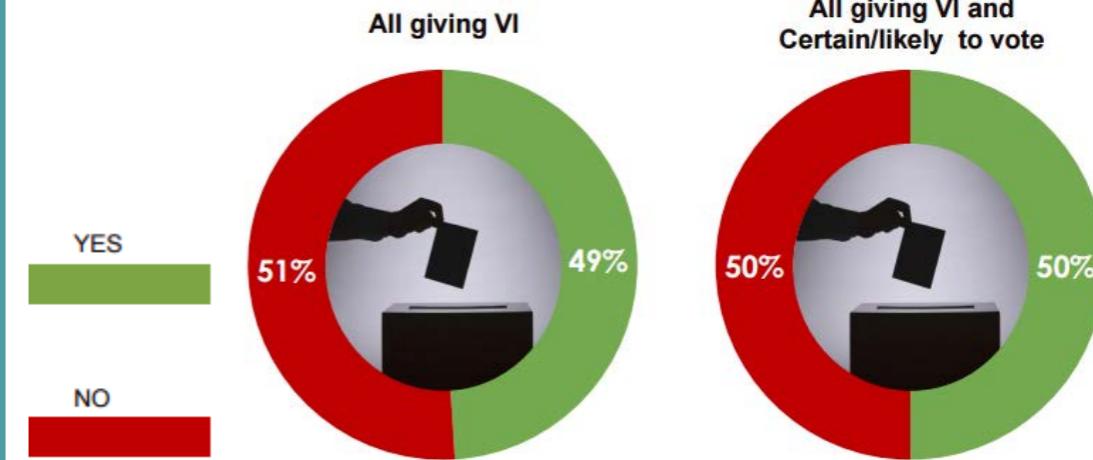
Key findings include:

- Among those who expressed a voting preference and who would be very likely or certain to vote in an immediate referendum, 50% (+2pts) said they would support independence with the other 50% of voters (-2pts) saying they would back Scotland remaining in the UK.
- We also asked voters to tell us the extent to which they supported independence or the UK by placing themselves on a scale of 1-10, where 1 was complete support for independence and 10 for the union. Interestingly, 15% of voters place themselves as between 4 and 7 on this scale, meaning that they are those most likely to be persuaded to change their minds in any forthcoming campaign.
- Almost half (48%) of voters said that, in the event of Scotland becoming independent, it should be a full member of the EU, while 27% favour an independent Scotland having full single market access outside formal membership.

[Read more ...](#)

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

All giving a voting intention (VI)



Base: All giving voting intention = 954. All giving voting intention and certain to vote = 858; Data collected among 1,000 Scottish adults 16+, 24 Feb- 6 March



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# SATISFACTION WITH HAMMOND DROPS, AS DOES ECONOMIC OPTIMISM



**Satisfaction with the Chancellor has fallen five points since November, based on fieldwork after the Budget (but before the announcement of a U-turn on National Insurance contributions for the self-employed).**

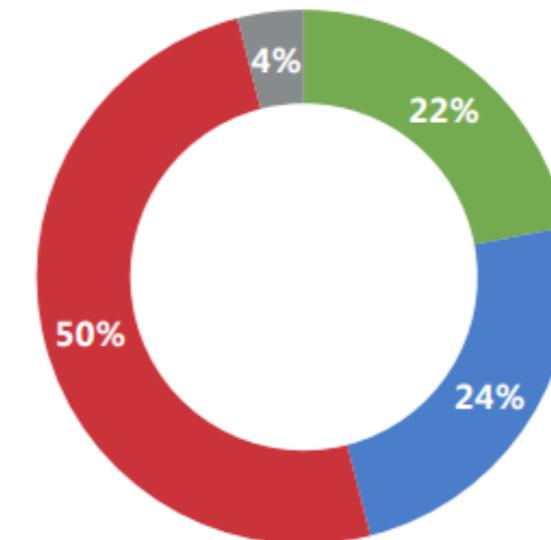
Key findings include:

- Satisfaction with the Chancellor has fallen five points since November to 34%, while 46% of the British public are dissatisfied with him (up 18 points). These ratings are similar to George Osborne's after his first year (36% satisfied, 45% dissatisfied in March 2011), although Mr Osborne's ratings had dropped to 27% satisfied, 60% dissatisfied by March 2016.
- These findings come as economic optimism also slips this month. Half (50%) say they expect the country's economy to get worse over the next 12 months, an increase of six points from February. One in five, 22%, expect the economy to improve, giving an Ipsos MORI Economic Optimism Index of -28 (% get better minus % get worse), back to the level seen in December last year.
- When it comes to the public's views of the Budget overall, 38% say it was good for the country, and 42% bad.

[Read more ...](#)

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

March 2017



IMPROVE	22%
STAY THE SAME	24%
GET WORSE	50%
DON'T KNOW	4%
<b>EOI = -28</b>	

Base: 1,032 British adults 18+, 10th – 14th March 2017



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# 60 YEARS OF 'EUROPE' – A SUCCESS STORY?



A global study to mark 60 years since the Treaty of Rome, suggests that the global public see some reasons to celebrate, with on average half considering the European project to have made Europe stronger.

## European project a success?

Over half (53%) people across the 25 countries worldwide think the European project has made Europe stronger, compared to 1 in 7 (14%) who think it has made Europe weaker.

## Europe on the wrong track?

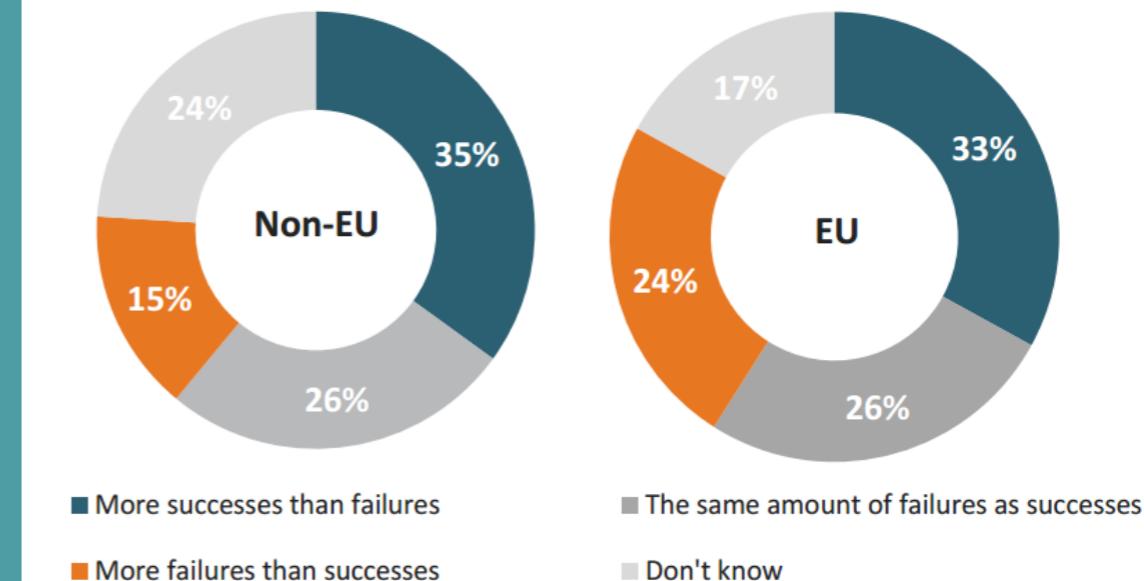
When asked if they would say things across the European Union are heading in the right direction or are off on the wrong track, nearly 6 out of 10 (57%) on average across the nine European countries think the European Union is off on the wrong track.

## Looking to the future

Europeans think the EU's most important priorities should be: 1) reducing poverty and social inequality, 2) fighting organised crime and terrorism, 3) creating economic growth and jobs, 4) reducing illegal immigration, and 5) fighting tax fraud and evasion.

[Read more ...](#)

Taking everything into account, do you think this European project over the last 60 years has had...?



Base: 18,021 aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, Peru, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey and US. March 2017.



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# SOCIETY



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# THREE IN FOUR WOMEN AROUND THE WORLD BELIEVE THERE ARE UNEQUAL RIGHTS IN THEIR COUNTRY



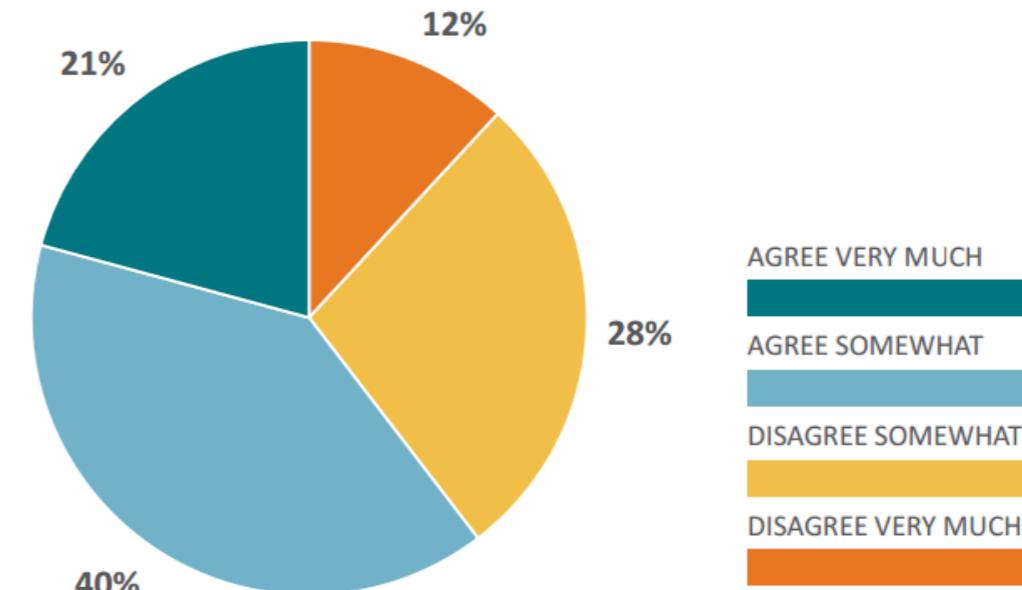
**In the wake of International Women's Day, new data shows that although the vast majority in 24 countries around the world say they believe men and women should be treated equally and most still think the current situation is one of inequality in terms of social, political and/or economic rights.**

Key findings include:

- Nine in ten men and women say they believe in equal opportunities
- But three-quarters of women say inequality still exists in their country and 40% of women say they personally don't have equality
- One in five men and women think women are inferior to men, which increases to almost half in India and Russia
- One in four men and women say they are scared to speak out for equal rights
- 6 in 10 on average agree they have "full equality with men in their country and the freedom to reach their full dreams and aspirations" – although this still means that in several countries many women disagree.
- The majority on average define themselves as a feminist (58% on average), even though a quarter (24%) say they are scared to speak up for equal rights – especially in India.

[Read more ...](#)

**To what extent do you agree or disagree with the following statement: "In my country, I have full equality with men and the freedom to reach my full dreams and aspirations?"**



Base: 8,822 aged 16/18-64 across Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, Peru, Poland, Russia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States. Jan-Feb 2017



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# EUROPEAN PERCEPTIONS OF CLIMATE CHANGE



**Over 80% believe in climate change is happening, following a survey on perceptions of climate change across four European countries, France, Germany, Norway and the UK.**

Key findings include:

- Over 80% in all four countries believe climate change is happening, and 60% believe that we are already feeling the effects of climate change. Just 24% to 35% believe there is strong scientific consensus on climate change.
- There is broad support in all four countries for being part of the Paris international climate change agreement, and for using public money to help both their own and developing countries deal with the impacts of climate change, and to subsidise renewable energy sources.
- Most do not agree that climate change is one of the causes of the high number of refugees coming to Europe. That said, 30% (in the UK), 37% (in France), 39% (in Germany) and 57% (in Norway) think that climate change will lead to more migration to their country in the future.

[Read more ...](#)



## European Perceptions of Climate Change (EPCC)

*Topline findings of a survey conducted in four European countries in 2016*

March 2017



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# FUTURE CITIES DIALOGUE



**Citizens want technology to make life in our future cities easier, but also prioritise equality of access and social interaction.**

**Through an extended public dialogue Ipsos MORI and experts explored citizen preferences and priorities for Innovate UK.**

The dialogue elicited 10 key principles which underpinned participants' preferences for the future cities they wanted to see and the integration they believed the UK should aim for. These principles will help Innovate UK understand public priorities and the kinds of technologies and futures that would be publicly acceptable.

The first two principles were the most prevalent.

- Equality – services should cater for all, with no citizens or communities left behind due to lack of access to technology or resources
- Although technology can make our lives easier, it should not lead to us losing skills or make us 'dumb' by removing choice

You can read all the rest of the principles via the link below.

[Read more ...](#)



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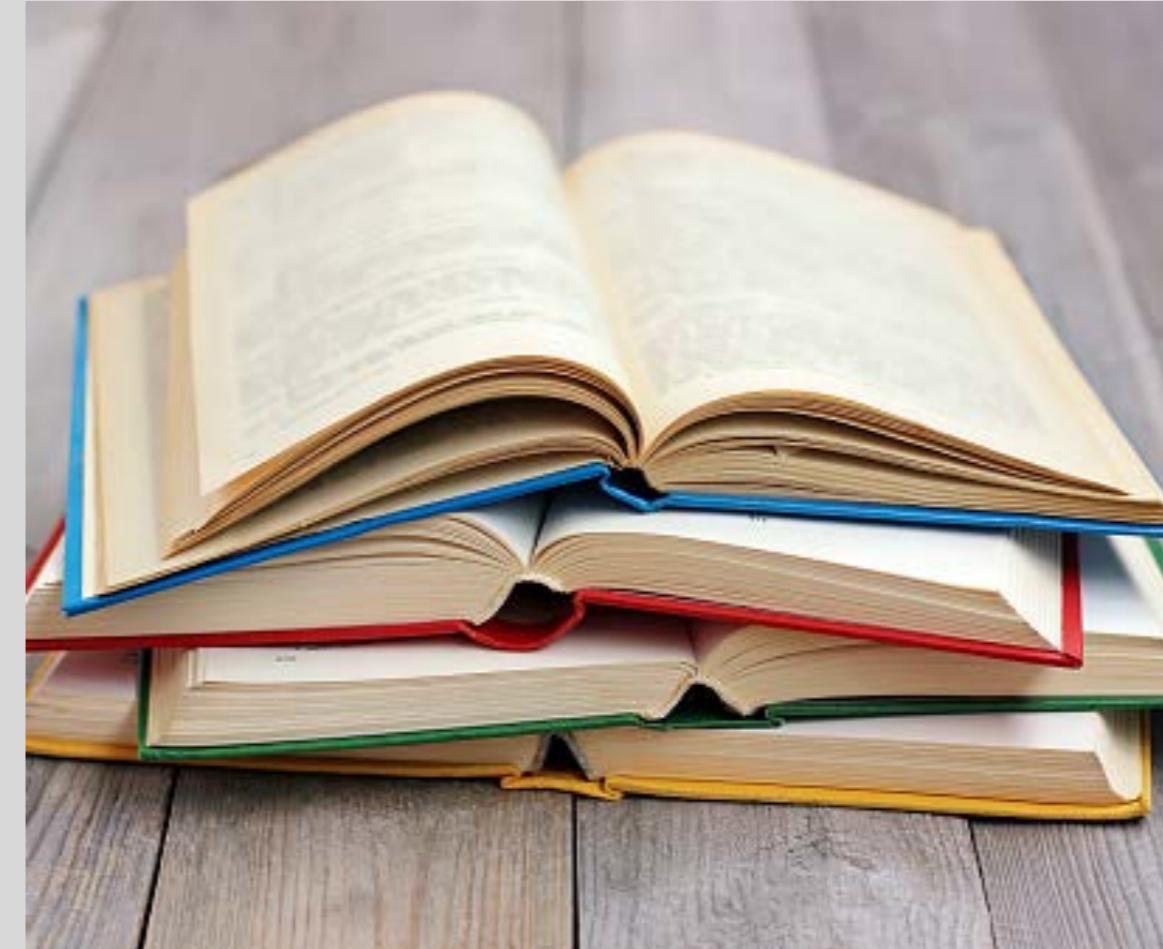


**The Royal Society of Literature looks at how many people read literature, what literature means to them, and which writers they consider to be writers of literature.**

Key findings include:

- Three-quarters of the British population have read literature in the last 6 months, based on their own definition of what literature is.
- The internet is not a threat to reading – literature readers are more likely than non-literature readers to use the web.
- Literature plays an important role in social cohesion – 81% agree that literature helps people understand other points of view.
- Respondents were invited to name a writer they consider to be a writer of literature. The resulting 400 names – topped by Shakespeare, Dickens, J K Rowling and Roald Dahl – are an eclectic mix of classic and popular writers, half of them living and nearly half from overseas, though only 31% of them women and 7% Black, Asian or Mixed Race.

[Read more ...](#)



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# HEALTH



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# CONCERN WITH THE NHS AT THE HIGHEST LEVEL SINCE 2002



**Over half of the British public (52%) now see the NHS as one of the biggest issues facing Britain, the highest level of concern since June 2002.**

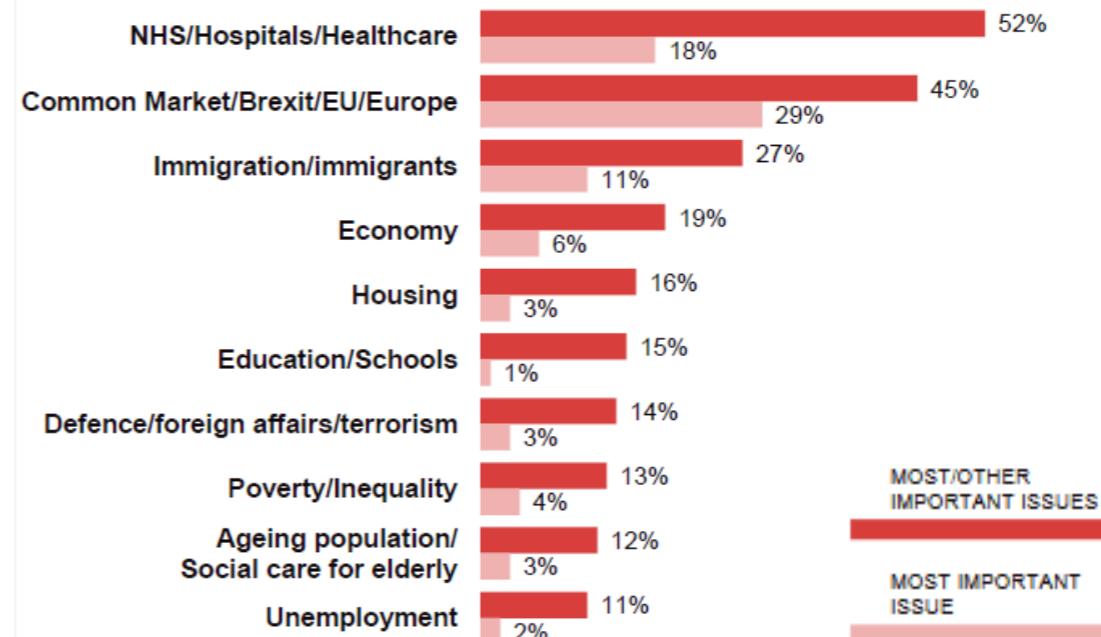
Key findings include:

- The proportion of the public who see the EU/Brexit as one of the biggest issues facing the country is also rising and is now at the highest ever recorded level of concern
- At the same time, concern with the economy has dropped to pre-crash levels, with 19% seeing it as a big issue – the lowest level since February 2008.
- Concern with the NHS this month is ten percentage points higher amongst Conservative party supporters than it is amongst Labour party supporters (62% vs 52%), and they are also more likely to be concerned about the other issues in the top three overall – EU/Brexit (50% compared to 43%) and immigration (38% vs 23%).

[Read more ...](#)

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

Top mentions %



Base: 980 British adults 18+, 10 – 23 February 2017.



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# MAJORITY SAY THE NHS' ABILITY TO DELIVER CARE IS GETTING WORSE, AND EXPECT DECLINE TO CONTINUE



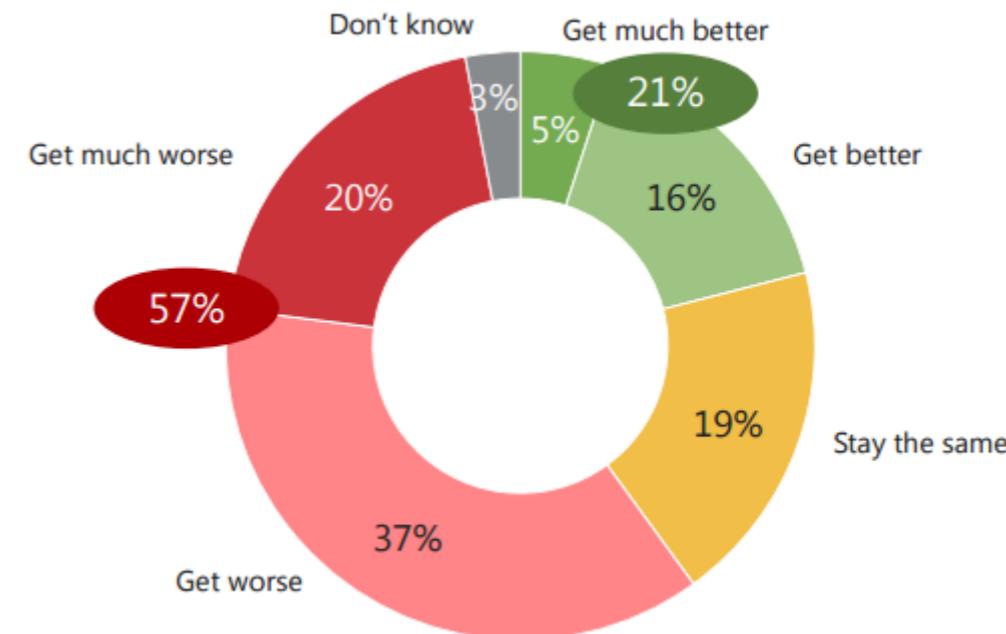
57% of Britons think that the ability of the NHS to deliver the care and services it provides has been getting worse over the last six months. This is an increase in concern since January, when 52% thought it was getting worse.

Key findings include:

- And Britons are also pessimistic about the future of the NHS. Again, 57% expect the NHS to get worse over the next few years, against 21% who expect things to get better.
- This is the highest level of pessimism seen since the turn of the millennium. The over 75s are the only optimistic group (41% better, 35% worse), while Conservative supporters are also less pessimistic than Labour supporters (although still 50% still think the NHS will get worse, against 61% of Labour supporters).
- This pessimism in Britain is despite the fact that Britons are among the most positive internationally about the current quality of healthcare. Seven in ten (69%) people in Britain rate the quality of healthcare that they and their family currently have access to as good, well above the global average across the 23 countries of 47%.

[Read more ...](#)

And thinking about the NHS over the next few years do you expect it to...?



Base: 1044 adults aged 18+ in the UK, 10 – 14 February 2017



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# DEPARTMENT OF HEALTH BIRTH INJURY COMPENSATION POLICY RESEARCH



**The research explores the 'journey' of families who have experienced a brain injury during birth; their decision making around litigation; and views of a potential policy options and care arrangements.**

The report is shaped around the key stages of the journey for families experiencing brain injury during birth.

- Chapter 2 looks at the early stages of the journey following an incident at birth, including experiences of the first few days and weeks after the birth through to investigating what happened.
- Chapter 3 explores the decision-making process parents go through when considering litigation and the experiences of the litigation process itself.
- Chapter 4 looks at how parents meet the ongoing needs of the child, both putting an appropriate care package in place and funding it. How each stage relates to the potential design for a new scheme for birth injuries is discussed throughout.

[Read more ...](#)



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# INTERNATIONAL



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# UNEMPLOYMENT REMAINS THE TOP ISSUE GLOBALLY



**The majority of people across 25 countries think their country is on the wrong track. As unemployment is once again the single biggest worry for global citizens.**

## Right track or wrong direction?

The study shows that China leads as the single most optimistic country with 91% thinking their country is on the right track, followed by India (75%), Saudi Arabia (73%) and Russia (64%).

## Worries of the world

When looking at the issues that drive sentiment in the 25 countries, unemployment is once again the single biggest worry – mentioned by 38% of people globally. Despite this, long term trends show that unemployment has been decreasing since 2012 when half across all countries said this worried them.

## What worries Britain?

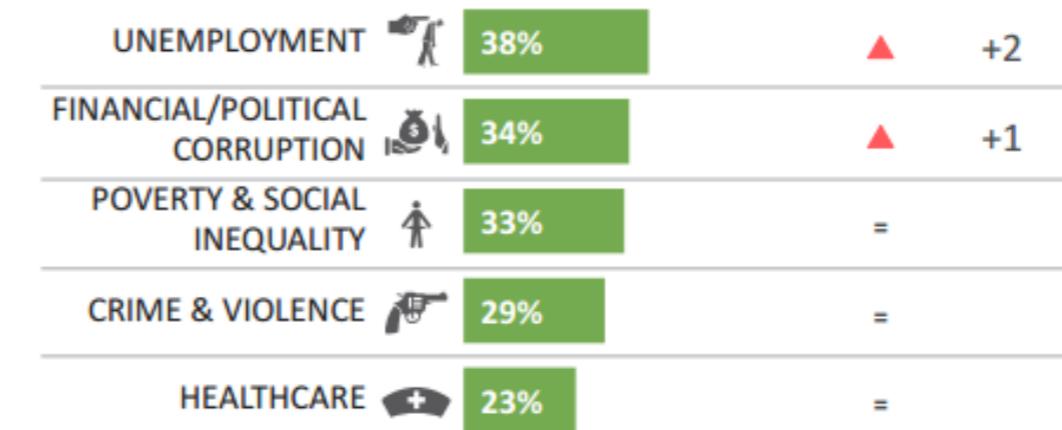
Healthcare is now the single biggest concern for Britain at 44%, an eight-point increase this month. Britain is now in joint-third place as the most concerned about healthcare, equal with Poland and behind only Hungary and Brazil.

[Read more ...](#)

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

*% change compared with previous month:*

**Jan 2017**



Base: Representative sample of adults aged 16-64 in 25 participating countries. c.18,000 per month.  
Source: Global Advisor. \*Please note that participants in China were not shown the full list of topics for this question. Financial/political corruption, poverty and social inequality, taxes, and rise of extremism were excluded from the list shown to Chinese participants.



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# THREAT OF WASTE WATER ON CLEAN WATER SUPPLIES



**Only one in three (34%) Global Citizens express confidence that waste water in their country does not pose a threat to their clean water supply.**

The theme for World Water Day 2017 is "Why waste water?" and is in support of the UN's Sustainable Development Goal 6.3 to improve water quality by reducing, treating and reusing wastewater.

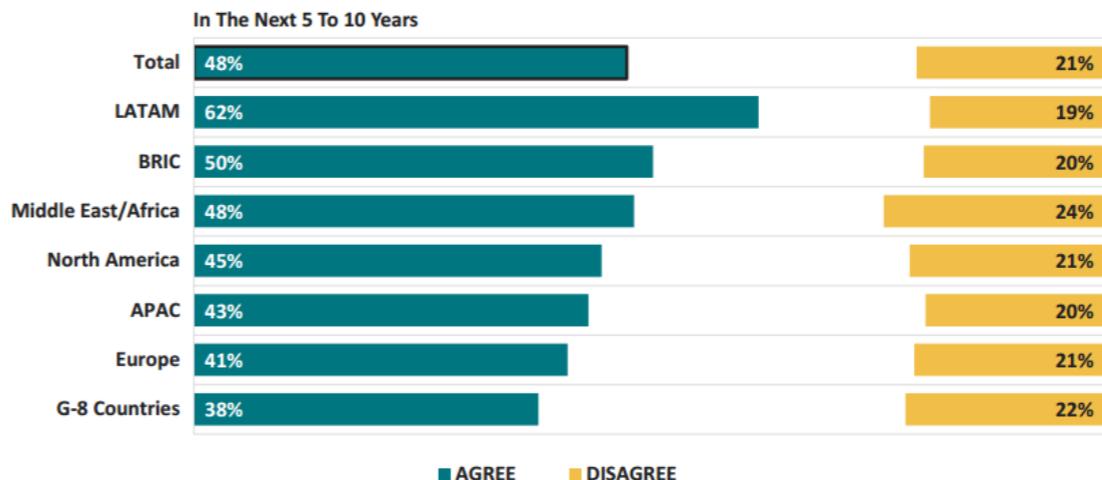
Globally, the vast majority of all the wastewater from our homes, cities, industry and agriculture flows back to nature without being treated or reused and global citizens seem very well aware of the problem.

Only 34% say they are confident that waste water does not pose a threat to the clean water supply in their country today and 48% say they are worried that residential and industrial growth in their country over the next 5 to 10 years will put their clean water supply at risk.

When asked if they are worried that industrial and residential growth in their country will put clean water supply at risk within 5 to 10 years almost half (48%) agreed they were.

[Read more ...](#)

**I am confident that the waste water from households and industry in ... is effectively treated and is not a threat to our clean water supply.**



Base: All Respondents (n=18,523)



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# MEDIA BRANDS & COMMUNICATIONS



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# THE NEW FACES OF GAMING



**If I ask you to picture a gamer, what do you see? Most people will imagine a man, in his 20s, using a games console or computer.**

It's fair to say that the image exists for a reason – this 'classic' gaming demographic group is still a key chunk of the market and shows no sign of losing interest in the medium.

However, gaming in 2016 is broad and complex; a 'typical' gamer may not exist.

The classic gaming demographic of a man, in his 20s, using a games console or computer, is still a key component of the market and shows no sign of losing interest in the medium.

But here is a growing appetite for gaming across a whole range of age and gender groups.

To be successful, manufacturers and content producers need to adjust their message, to appeal to a broader section of their potential audience.

[Read more ...](#)



Ipsos MORI

# #NOTAJOKE. BRANDED ENTERTAINMENT OSCAR STYLE



February is a prime month for American brands looking to capitalise on two of the largest television audiences of the year – the Super Bowl and the Academy Awards.

Unfortunately for the teams behind Best Picture winner Moonlight, and the incorrectly announced Best Picture winner La La Land, Price Waterhouse Coopers' mishandling of the Best Picture Award winner envelope has overshadowed almost all of the stories to emerge from the evening's events.

The question is: do media planners and buyers see the world as others do, and does it affect the decisions they make?

This paper explores 3 key elements on how to win at Branded Entertainment:

1. Start with people
2. Ensure attention and engagement
3. Effectively leverage the power of amplification

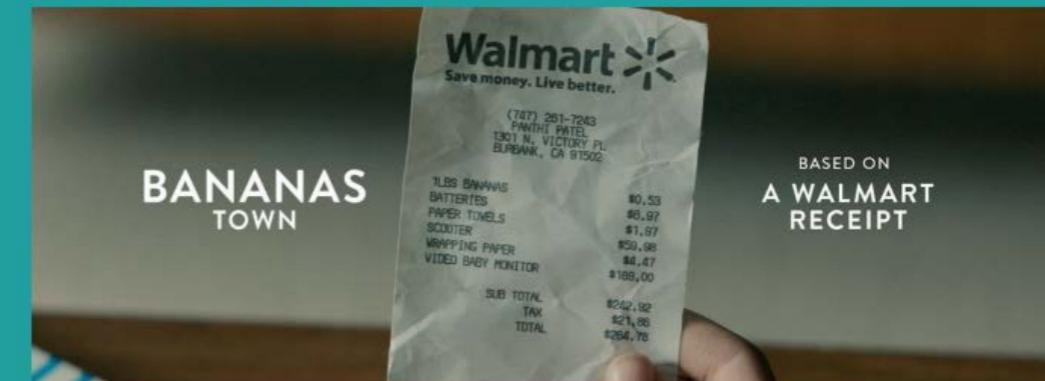
[Read more ...](#)

March 2017

Ipsos Connect

## #NotaJoke. Branded Entertainment Oscar Style

Eleanor Thornton-Firkin & Leah McTieman

A Walmart receipt from Panthi Patel in El Segundo, CA, dated 3/1/2017, showing purchases of bananas, batteries, paper towels, a scooter, wrapping paper, and a video baby monitor. The total is \$264.76.

BASED ON  
A WALMART  
RECEIPT



Ipsos MORI

# ECONOMY & BUSINESS



Ipsos MORI



# CAPTAINS OF INDUSTRY ARE COMMITTED TO CHAMPIONING DIVERSITY AND INCLUSION IN THE WORKPLACE



**Captains of Industry say that despite nearly all board members on the FTSE 500 saying they are actively promoting and championing diversity and inclusion in their company (86%), a very large proportion say they have no female board members at all (71%).**

## Women on boards

Nearly two thirds (64%) of Captains say that their company is actively trying to increase the number of women on their main board. Captains report that 14% of their executive board are women and those businesses that are actively trying to increase the number of women on their main boards cite common themes in their policies to improve ratios.

## Sectors

Not all industries are alike. The survey found that seven out of ten (70%) Captains in the Services sector agree that they are committed to increasing women on the board, compared to 59% in the Industrial sector.

## Geographies

Geographically, while nine out of ten of Captains in London (90%) are committed to diversity in their company, this falls to eight out of ten (82%) outside of London.

[Read more ...](#)



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# LEADERSHIP CONNECTIONS 2017: HR DRIVING BUSINESS TRANSFORMATION



**Is your organisation currently going through transformation? The answer from the clear majority of HR leaders we spoke to was an emphatic 'yes'. Find out how HR is driving transformation.**

As the world of work changes, the role of the HR professional continues to evolve. In this report, we explore the part that HR plays in organisational transformation, and offer some recommendations for putting people at the heart of it.

Key findings include:

1. Transformation' is often more like evolution. "However we define 'transformation', every organisation we spoke to is dealing with continuous change."
2. People would rather work for a cause than a company "constantly communicate your raison d'être."
3. In a more complex business environment, empowerment is key "creating a permissive culture will be increasingly important."
4. Collaboration and agility are crucial "cross-boundary working and the ability to swiftly change as the situation arises are vital leadership skills."

[Read more ...](#)



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# HOUSING



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# CAPTAINS JOIN PUBLIC IN PRIORITISING HOUSING INFRASTRUCTURE



**Industry leaders' top priorities for investment are very different to those of the British public but both agree that as a country we are not doing enough to meet our infrastructure needs.**

- Captains of Industry put airports and broadband top of their infrastructure wish list; both are low priorities for the public
- But new housing supply is seen as a priority by both groups
- A majority of business leaders think we are not doing enough to meet our infrastructure needs as a country
- Most think we have a poor record at getting infrastructure right

Both think that as a country we are not doing enough to meet our infrastructure needs and investing in infrastructure is vital to Britain's future economic growth. Captains' hold these views even more strongly than the public.

But there are also sharp differences in opinion. The British public want their voices to be heard, with 67% agreeing that delays to infrastructure projects are justified if it means that local communities' views can be heard properly. Captains are less insistent; only 40% hold this view and 43% disagree.

[Read more ...](#)



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# OPINION



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## Have we had enough of climate experts? Does it matter?

The public hugely underestimate the scientific consensus on the causes of climate change, and are very mixed in their own views about how far human activity contributes to it.

[Read more ...](#)

## Narrow band of “undecideds” will pick winner of face-off between Sturgeon and May

A high stakes gamble with public opinion – what an extraordinary few days in Scottish politics, says Mark Diffley in The Courier.

[Read more ...](#)

## City limits: what do we want from our future cities?

Ben Marshall blogs on our public dialogue research for Innovate UK focused on the key choices faced by cities and what urban citizens value most.

[Read more ...](#)



## CONTACT US



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