

Ipsos MORI Highlights

April 2017

Theresa May has big lead as most capable PM

Levels of pessimism for future of NHS, policing and education highest for 15 years

Most people do not think women belong at home

Signs of rising confidence in House Price Outlook following post-Brexit dip

Emerging markets most likely to feel pressure while established economies less optimistic for the future



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WELCOME TO APRIL HIGHLIGHTS

My Easter break was rudely interrupted by a flurry of calls from the media as the government triggered a snap election. Mrs May looks to win big against Corbyn's demoralised and divided Labour party. Theresa May has the highest rating for being 'capable' of any UK Prime Minister we have ever measured. After the SNP overturned Labour's historic Scottish strongholds in 2015, this election could see a Conservative landslide, putting Labour out of any chance of power for a generation. We look at all the latest polling numbers in this issue, including who is winning on key issues (mostly the Conservatives).

In other news, economic optimism edged up again this month, as did confidence about house prices: lower GDP growth and rising inflation have yet to panic UK consumers.

On UK public services there are signs that seven years of austerity are starting to be noticed – at least in the media, if not in personal experience. We have the highest recorded level of pessimism about the future of education, policing and the NHS we have ever measured. Why will this not impact the election? In part because of virtually all these issues Theresa May is seen as more competent than Jeremy Corbyn, and also because only a quarter of the electorate say they or their family have been affected by cuts so far (a figure unchanged for several years).

Elsewhere we look at the role of women in the UK, and globally – 22% think women belong at home, but most of these people will not be around in 2030, due to their age. For everyone else, traditional misogyny, and homophobia are becoming very old fashioned. We have delved into cyber security – something worrying business and consumer alike.

We look at the Middle East and Peru in our in-depth country reports this month, and for everyone, how global research is now done over night – it can be as fast as 80 minutes from launch to completion in some cases!

I hope you enjoy this issue – do keep an eye out for the Ipsos Global Trends survey – we have been working on this magnum opus of 400 questions of 18,000 people in 23 countries for some months and we publish on 2 May – it highlights precisely the issues brands, businesses and governments face globally. Report, slides, data and more will be launching on Tuesday 2 May on our website.



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IPSOS MORI'S APRIL HIGHLIGHTS

POLITICS



- Theresa May has big lead as most capable PM
- Conservatives lead on four of the five most important issues for the public
- Public concern about Europe/Brexit rises to a new high
- Levels of pessimism for future of NHS, policing and education highest for 15 years
- Most Brexit voters want more members to leave the EU

SOCIETY



- Most people do not think women belong at home
- Under pressure? You must live in Asia not Europe
- Half of public support more immigration by highly skilled workers

HOUSING



- Signs of rising confidence in House Price Outlook following post-Brexit dip
- Data privacy and smart meters



ECONOMY & BUSINESS

- EY EMEA Fraud Report 2017
- Cyber security breaches survey 2017



HEALTH

- Tracking working relationships and perceptions of PHE



MEDIA, BRANDS & COMMUNICATIONS

- The need for speed
- An efficient alternative to concept optimization
- Basic digital skills UK report 2017
- 33% of GB households now own a smart TV



INTERNATIONAL

- Digital trends in MENA
- Flair Peru 2017: From informality to modernity



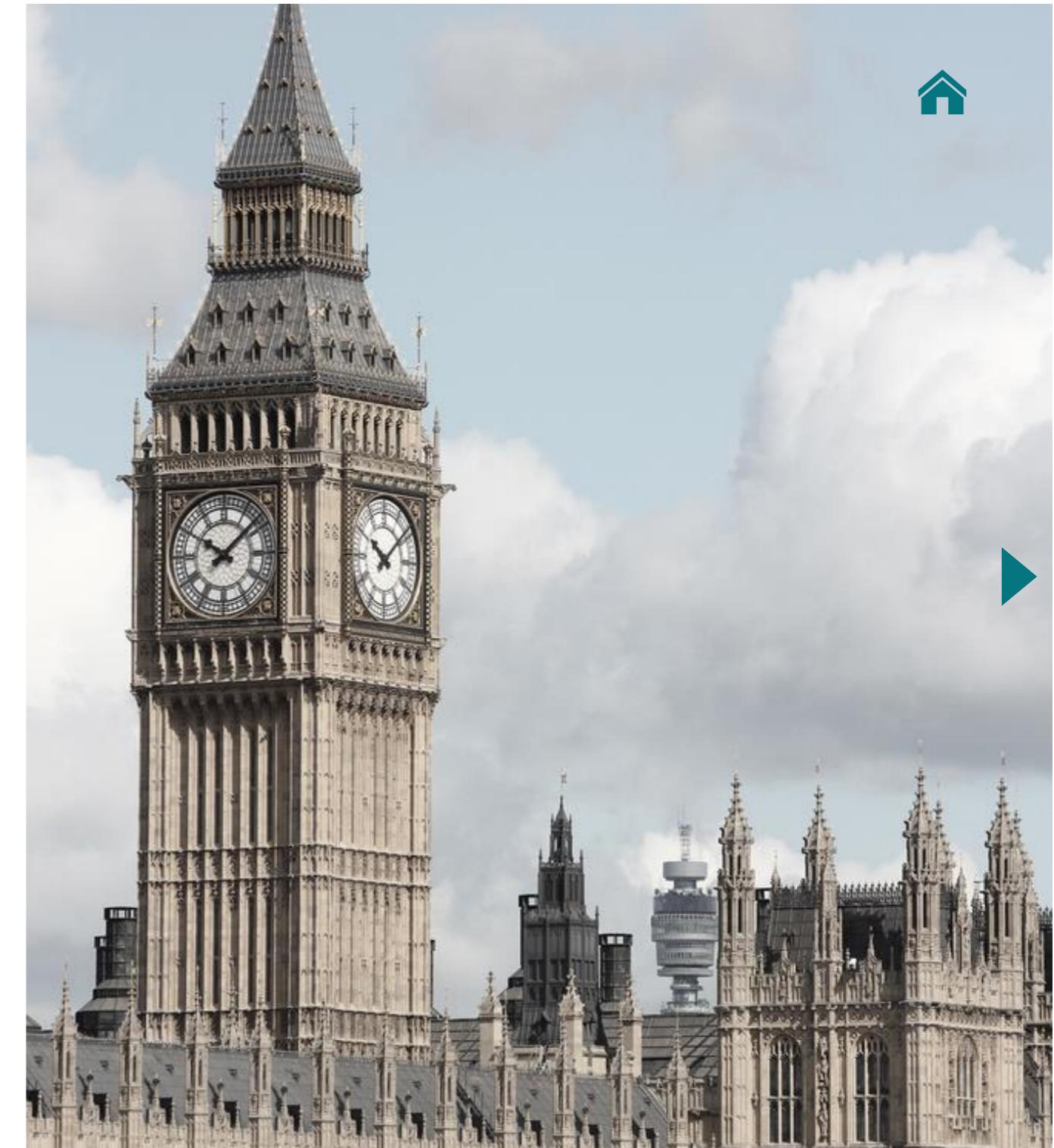
OPINION

- Is the public really engaged with the sharing economy?
- Data privacy and security: what are the real concerns?
- What role will the NHS play in the 2017 election?

POLITICS



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THERESA MAY HAS BIG LEAD AS MOST CAPABLE PM



**One week following Theresa May's call for a snap general election
Ipsos MORI's Political Monitor finds the Conservatives with a
significant lead over Labour.**

Key findings include:

- Three in five (61%) say Ms May is most capable compared with a quarter (23%) who say Jeremy Corbyn.
- Theresa May also remains the leader with the highest satisfaction ratings – well ahead of her rival Jeremy Corbyn.
- Conservative party standing at 49% (up 6 points from March) while Labour trail at 26% (down 4). The poll also shows the Liberal Democrats on 13% (no change), and UKIP at 4% (down 2). This is the biggest Conservative lead in our voting series since September 2008, and matches their lead in May 1983.
- 63% of those expressing a voting intention have made up their mind on who they will vote for come June.
- Brexit is the top issue for Conservative (57%) and Liberal Democrat (59%) voters while being cited by one in three (32%) Labour voters.

[Read more ...](#)

Who do you think would make the most capable prime minister, the Conservative's Theresa May, or Labour's Jeremy Corbyn?

April 2017

MAY

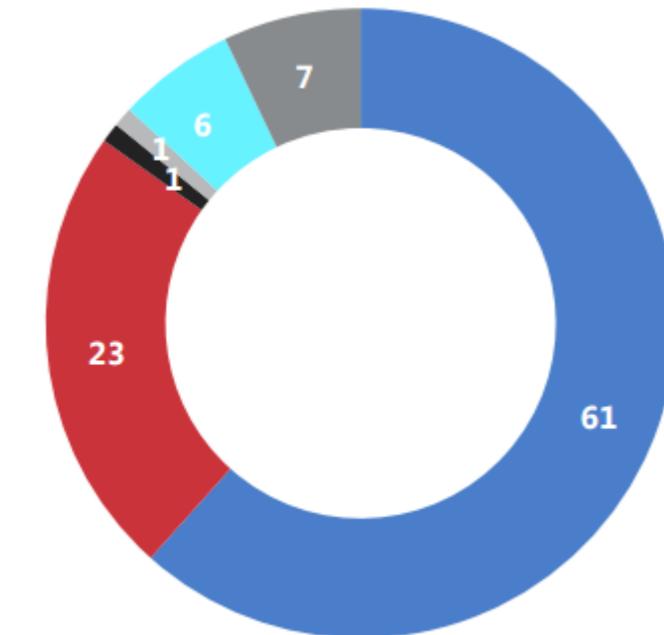
CORBYN

OTHER

NO DIFFERENCE

NEITHER / NONE

DON'T KNOW



Base: 1,004 British adults 18+, 21st – 25th April 2017 *In May 2015 asked as: Who do you think would make the most capable Prime Minister, David Cameron, Ed Miliband or Nick Clegg?



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CONSERVATIVES LEAD ON FOUR OF THE FIVE MOST IMPORTANT ISSUES FOR THE PUBLIC



Britons prefer the Conservatives and Theresa May over Labour and Jeremy Corbyn on many of the policy areas that are seen as most important to voters, with healthcare the main exception.

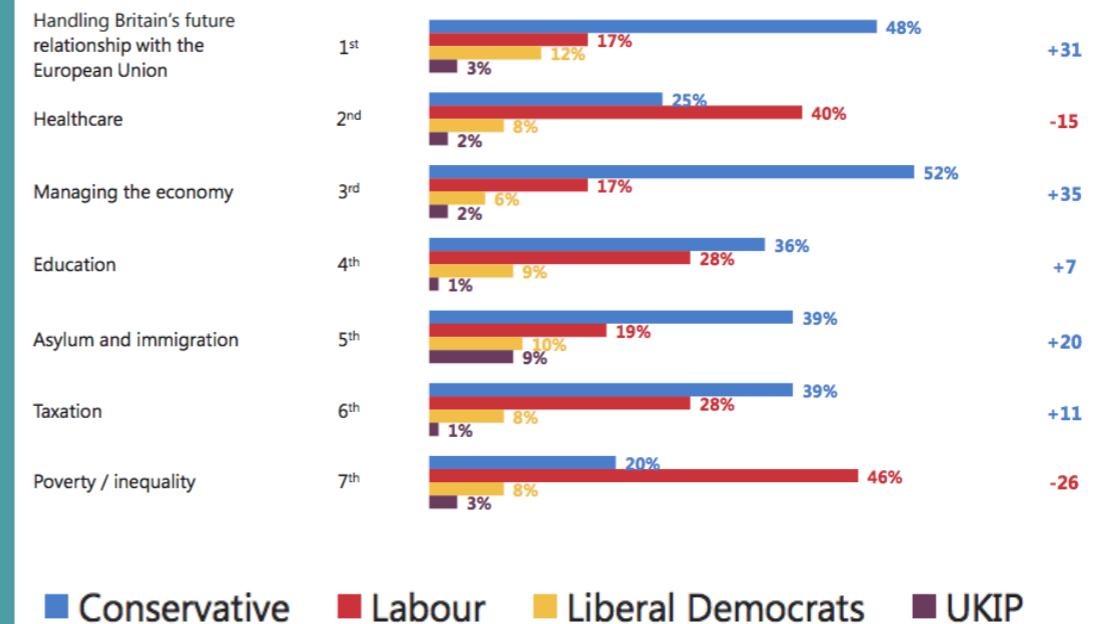
Key findings include:

- The Conservatives are seen as the party with the best policies for five of the top seven issues that are seen as most important to voters.
- On the top issue, Brexit, the Conservatives are mentioned by 48% of the public as the best party to handle Britain's future relationship with the European Union, compared with 17% who said Labour have the best policies to do so.
- When it comes to managing the economy more than half (52%) say the Conservatives have the best policies (17% Labour) while 39% favour them on immigration (19% say Labour).
- Labour however keep their traditional lead as the party with the best policies on healthcare (40% vs. 25%). Labour also do better than the Conservatives when it comes to other issues such as housing (35% vs. 24%) and poverty/inequality (46% vs. 20%).

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Which party do you think has the best policies on.... The Conservatives, Labour, Liberal Democrats or some other party?

Importance ranking Conservative lead



Base: 1,004 British adults 18+, 21st – 25th April 2017



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PUBLIC CONCERN ABOUT EUROPE/BREXIT RISES TO A NEW HIGH



At the point when Article 50 was triggered, the March Issues Index showed a new record in the proportion who see the EU/Brexit as one of the biggest issues facing Britain.

Key findings include:

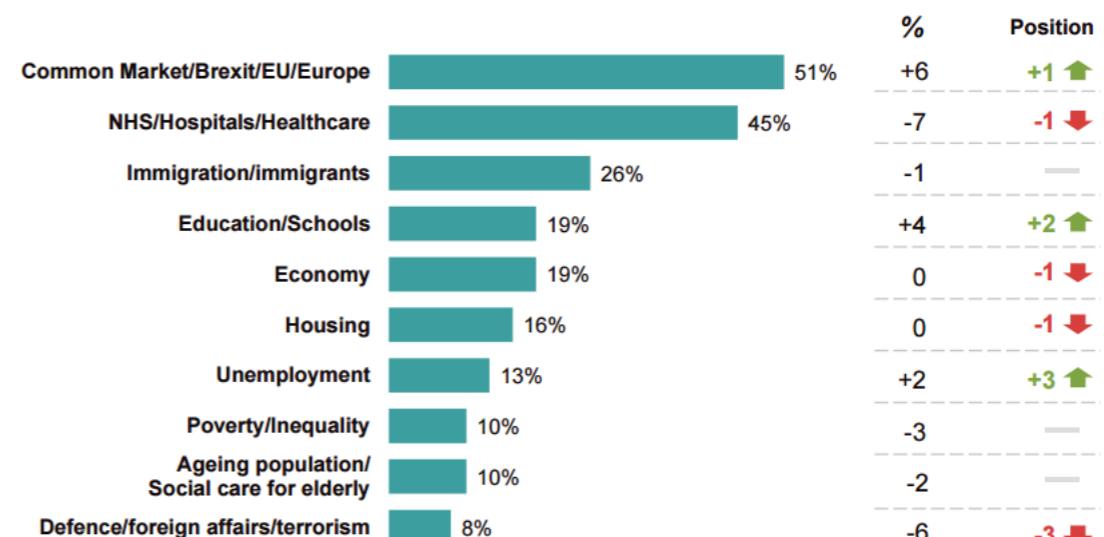
- Half (51%) now cite the EU/Brexit as an issue, six percentage points higher than February and the highest score since records began in September 1974.
- Concern about the EU/Brexit is now six percentage points greater than worries about the NHS (45% this month), making it the biggest issue facing Britain. This is only the second time that the EU/Brexit has been the biggest issue facing Britain; the first time this happened was in November 2016.
- Further, one third (36%) of the public name Brexit as the single biggest issue facing Britain – a seven percentage point rise from last month's score, and twenty-three percentage points higher than the next single biggest issue – the NHS, on 13%.
- Concern about the EU and Brexit is the clear biggest issue for those from social grades AB and C1 – 68% of the former group and 54% of the latter consider it to be one of the biggest issues facing Britain.

[Read more ...](#)

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

Top mentions %

Change since Feb



Base: 1,020 British adults 18+, 10th – 19th March 2017



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LEVELS OF PESSIMISM FOR FUTURE OF NHS, POLICING AND EDUCATION HIGHEST FOR 15 YEARS



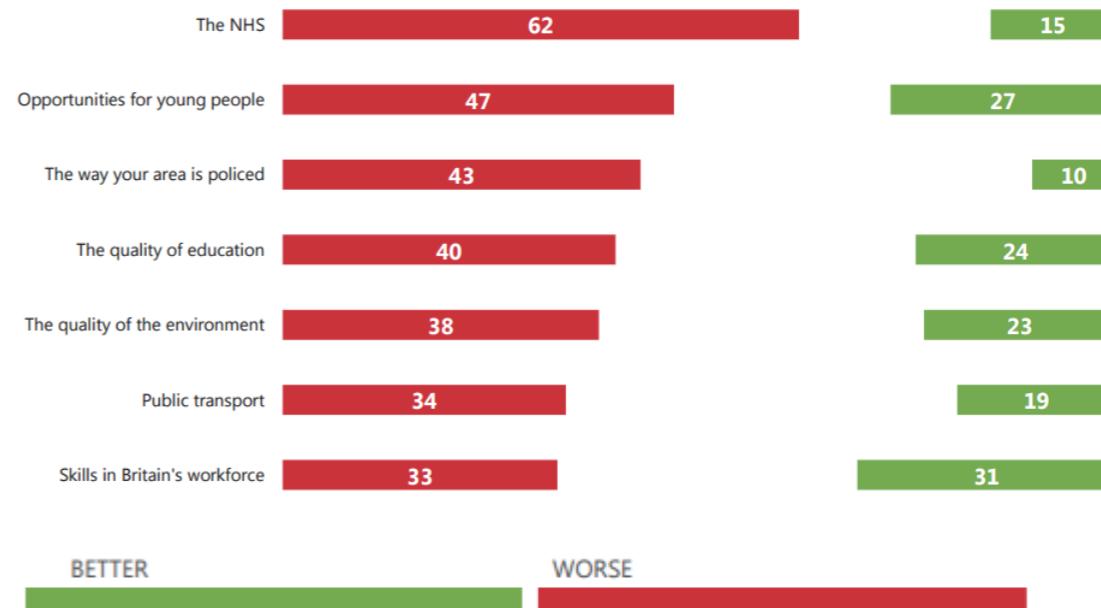
Nearly two in three think that the quality of Britain's public services has got worse over the last five years.

Key findings include:

- Pessimism for the future of the NHS, policing and education are at record levels.
- Three in five (63%) think that public services have got worse over the last five years, compared with 43% who said the same in 2015 and 40% in 2012. In addition, the majority of the public (62%) disagree that in the long term, the government's policies will improve the state of Britain's public services.
- There is also pessimism for the future of individual public services, with particular concern reported about the NHS. The results reveal the highest ever number of people expecting health services to get worse since 2002, registering over three in five of the public for the first time (62%).
- Across other public services the public are generally more pessimistic than optimistic about the future, with concern in many cases higher than in previous years.

[Read more ...](#)

Thinking about ... over the next few years do you expect it to get better, get worse, or stay the same?



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



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MOST BREXIT VOTERS WANT MORE MEMBERS TO LEAVE THE EU



As the UK begins the process of leaving the EU by triggering Article 50, the majority of people who voted “Leave” in last year’s referendum hope other countries will also leave the European Union soon, but most “Remain” voters hope the EU will keep its remaining members.

Key findings include:

- Seven Britons in ten (70%) said they thought it was most likely that other countries will also leave the EU in the five to ten years after Britain leaves; only a quarter (24%) thought it more likely that more countries will not leave.
- When asked what they would personally prefer to happen, the public are split: 42% want other countries to leave too, 43% would prefer no other countries to leave.
- But views on this second question dramatically differ according to views on Brexit: 65% of those who say they voted for Britain to Leave the EU hope other countries will also leave, while 65% of those who voted for Britain to Remain in the EU hope all the other countries will remain.

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SOCIETY



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MOST PEOPLE DO NOT THINK WOMEN BELONG AT HOME



Most people take a liberal view towards the role of women (although there are signs of a small recovery in traditional attitudes towards the role of women in four European countries).

Key findings include:

- Only four in ten (37%) believe that "the role of women in society is to be good mothers and wives", while many more (58%) disagree.
- When it comes to parenting, however, traditional views are more prevalent. A majority across the 22 countries think that it is better for parents of children to be married rather than unmarried (57%), and even more strongly that parents today do not take enough responsibility for the behaviour of their children (77%).
- The research also shows clear differences of opinion between emerging vs established economies, between men and women, and most notably, between those with religious faith and those without.
- Across 22 countries, in only three do most think the role of women is to be good mothers and wives – Indonesia (76%), Russia (69%) and India (64%).

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UNDER PRESSURE? YOU MUST LIVE IN ASIA NOT EUROPE



Many countries around the world have seen an increase in the number of their citizens who feel under pressure to be successful and make money, according to the new Global Trends Survey.

Key findings include:

- Emerging markets most likely to feel pressure and to value material success – while established economies less optimistic for the future
- Strong belief in the importance of a good work-life balance
- Also increase in proportion who feel they have enough trouble worrying about their own problems to worry about other people's

54% felt that they felt under a lot of pressure to be successful and make money, an increase of seven points on a like-for-like basis between 2014 and 2016.

The survey finds that **15 of the countries covered have seen a rise between 2014 and 2016 in the number of people feeling under pressure** to be successful. All parts of the world are seeing an increase in their citizens feeling under pressure.

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NEW POLL FINDS THAT HALF OF PUBLIC SUPPORT MORE IMMIGRATION BY HIGHLY SKILLED WORKERS



A new Ipsos MORI/King's College London survey asked whether more or fewer immigrants of various types and from various parts of the world should be allowed to come to Britain.

Key findings include:

- Newly published Ipsos MORI/King's College survey finds that half the British public would support an increase in immigration of highly skilled workers.
- Support for other types of immigration including low-skilled jobs is lower.
- Support for immigration is low among Leave voters but they would support the entry of more rather than fewer skilled workers.
- Australia and New Zealand are slightly more welcome than the rest of the world.
- 52% of British adults think more immigrants coming to do highly skilled jobs should be admitted, compared to 12% who think fewer should be allowed to come, a net score of plus 40.
- By contrast, only 18% think more should be allowed to come to do routine manual jobs, and 44% that fewer should, a net score of minus 26.

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HOUSING



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SIGNS OF RISING CONFIDENCE IN HOUSE PRICE OUTLOOK FOLLOWING POST-BREXIT DIP



The latest Halifax Housing Market Confidence Tracker (HMCT) shows a modest increase in the House Price Outlook (HPO), up from +42 in October 2016 to +44 in March 2017.

Key findings include:

- Following a 14 percentage point drop in the HPO in October 2016 the current survey shows the first signs that confidence in the housing market is rising, nine months after the Brexit vote.
- This figure is driven by a one percentage point decrease in expectations that average UK property prices will be lower in twelve months' time (down from 15% in October 2016) and a corresponding one percentage point increase in expectations that average UK prices will be higher in a years' time (up from 57%).
- Buying sentiment has continued a steady decline, dropping by three percentage points from +17 in October 2016, and is at the lowest point since September 2014, whereas the selling sentiment shows an eight percentage-point increase (up from +9 in October 2016).

[Read more ...](#)



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Ipsos MORI research for the Energy Networks Association explores consumer attitudes to smart meter data being used to more effectively manage the UK electricity network

Key findings include:

- Electricity consumption data is not considered sensitive information by most, and many were comfortable with this being accessed (on the understanding this was not linked to any personal contact information);
- Once participants understood the role and remit of Distribution Network Operators (DNOs) - as initial awareness was low - they felt further reassured that access to their consumption data would not result in negative outcomes for them (no selling or marketing, for example, or increases in bills);
- The use of consumption data to assist more efficient strategic planning was a benefit that resonated with many participants. These benefits for the network, as well as a general sense of reducing wastage and preserving resources, motivated most participants to be supportive of DNOs using this data (though some would like to see further evidence of a more direct benefit for themselves).

[Read more ...](#)

Consumer attitudes to DNO access to half hourly electricity consumption data

Ipsos MORI research study report

16th March 2017



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ECONOMY & BUSINESS



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Human instinct. Machine logic. Which do you trust most in the fight against fraud and corruption? Senior managers are failing to set the right tone on business ethics finds EY's Fraud Survey.

Key findings include:

- 51% of all respondents still perceive that corrupt practices happen widely in business in their country
- 77% of board members or senior managers say they could justify unethical behavior to help a business survive
- Only 21% of respondents are aware their company has a whistleblowing hotline

Despite sporadic progress in tackling bribery and corruption across Europe, the Middle East, India and Africa (EMEIA), 51% of respondents to the biennial EY EMEIA Fraud Survey still perceive the problem to be widespread in their country. Twenty-seven percent of all respondents state that it is common practice in their business sector to use bribery to win contracts, including 14% of respondents in Western Europe.

[Read more ...](#)



CYBER SECURITY BREACHES SURVEY 2017



Three quarters of UK businesses say that cyber security is a high priority for their senior management detailed in the latest Cyber Security Breaches Survey, as part of the UK Government's National Cyber Security Programme.

Key findings include:

- The 2017 survey again highlights that virtually all UK businesses covered by the survey are exposed to cyber security risks. Since 2016, the proportion with websites (85%) or social media pages (59%) has risen (by 8 and 9 percentage points respectively), as has the use of cloud services (from 49% to 59%). Three-fifths (61%) hold personal data on their customers electronically.
- In this context, three-quarters (74%) of UK businesses say that cyber security is a high priority for their senior management, with three in ten (31%) saying it is a very high priority.
- However, as in 2016, a sizable proportion of businesses still do not have basic protections or have not formalised their approaches to cyber security.

[Read more ...](#)



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HEALTH



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TRACKING WORKING RELATIONSHIPS AND PERCEPTIONS OF PHE



In late 2016, Ipsos MORI was commissioned to undertake the fourth wave of Public Health England's (PHE) research with stakeholders, which it has been running since 2013/14.

Key findings include:

- PHE should be strongly encouraged by the findings in this report – there have been a number of positive shifts in the quantitative metrics (particularly for Local Authority stakeholders) and qualitatively stakeholders talk of relationships having matured; entering into a positive and constructive steady state.
- PHE's stakeholders are strong advocates of the organisation with advocacy scores having risen, comparing very favourably to stakeholder reviews for other public sector organisations. PHE and its staff are well liked – stakeholders are invested in its success, recognising PHE is a critical cornerstone in the system.
- Last year saw some declines in positivity among Local Authority stakeholders following in-year cuts to public health funding, the Comprehensive Spending Reviews (CSR) and PHE's re-structure.
- Despite a challenging political and financial climate, PHE is seen to be increasingly effective in its work.

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MEDIA BRANDS & COMMUNICATIONS



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THE NEED FOR SPEED



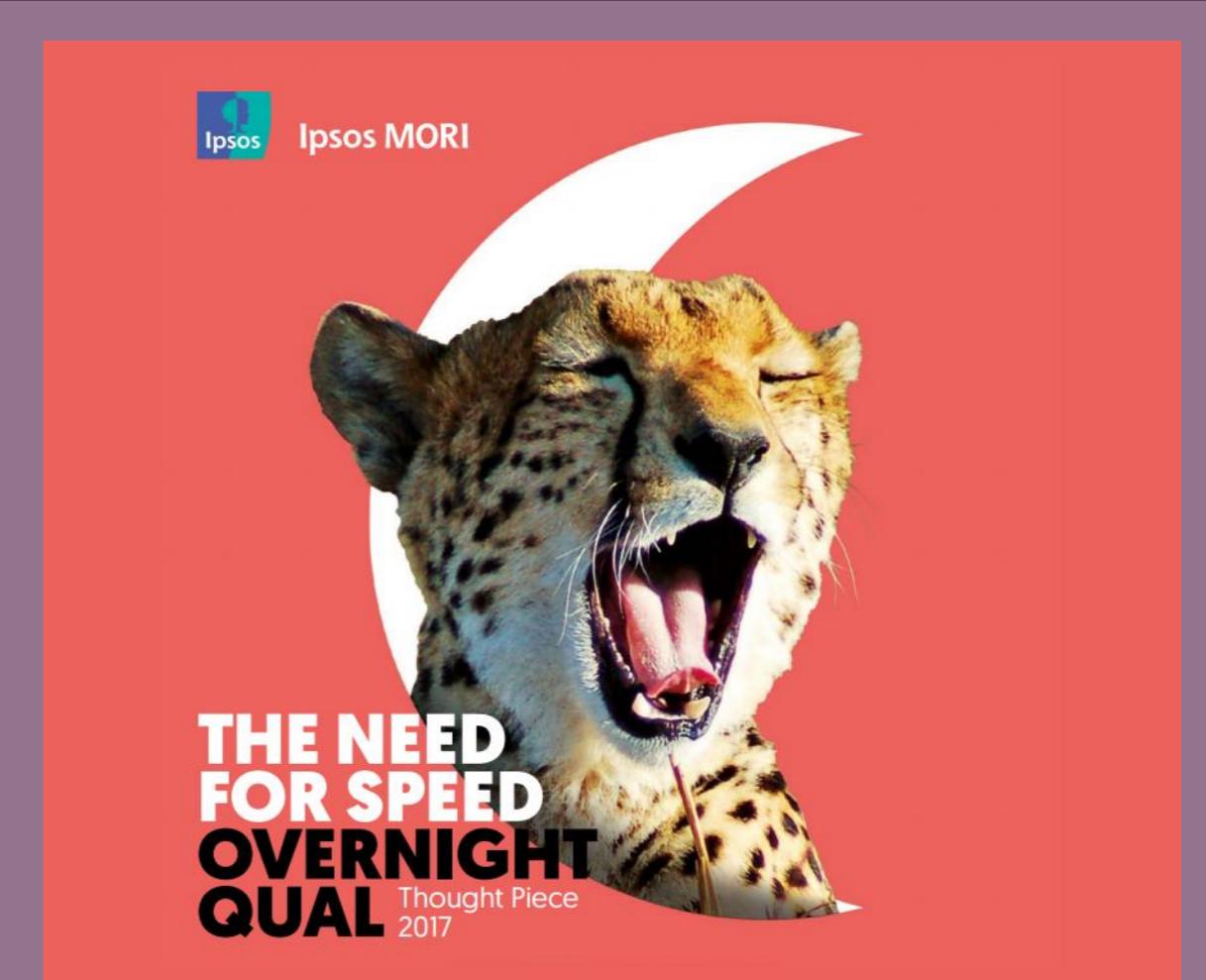
To stay in touch with the sheer pace of information delivery, we've created a fast and lean qualitative approach – Overnight Qual – to deliver insights at speed.

It's not just news and information that is being consumed quickly. Businesses are missing out financially by not getting their ideas into the market place on time.

In this reality, where our clients are juggling tight timelines to address business questions and meet internal deadlines – fast decision making is key. It's not uncommon for our clients to apologise for the speed with which they want us to deliver insights, but we prefer to embrace rather than apologise for the need for speed.

We're harnessing our expert gut reactions and have created a fast and lean qualitative approach – Overnight Qual – to deliver insights as quickly as we can. It capitalises on the visceral reactions of consumers in response to different stimuli, whether product or communications, echoing their instant decision-making in store or at home to help with optimisation. No more apologies for limited time. We endorse it. And so have some brands.

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AN EFFICIENT ALTERNATIVE TO CONCEPT OPTIMIZATION



In real life, who has time for two steps when you can do it in one?

You've narrowed down the best insights, benefits, and reasons to believe to include in your concept. What you need to know is which combination of these elements will yield the greatest consumer appeal – without relying on methods that favour close-in ideas.

This Ipsos white paper present the findings of our research on this subject, setting out a roadmap for finding the best combination of elements for a concept.

Armed with this information, our clients can choose the best possible concept to move forward with, understand its strategic role in the innovation portfolio (through its Archetype profile), and predict how well it will perform in-market.

[Read more ...](#)



BASIC DIGITAL SKILLS UK REPORT 2017



Findings from the Lloyds Bank Consumer Digital Index Report about the digital capability of people in the UK. 79% of the UK adult population have Basic Digital Skills.

Key findings include:

- 79% of the UK adult population have Basic Digital Skills, up from 77% in 2016
- This leaves 21%, or an estimated 11.5 million adults in the UK who don't have the required level of Basic Digital Skills
- This slight increase overall is part of what appears to be an overall broadening of the population's online skillset with significant increases in those claiming to be able to communicate, transact, create and problem solve online
- The increases at an overall level are most prevalent among certain demographic groups:
 - 15-24s have a near universal level of Basic Digital Skills (97%) with their capability to create and problem solve up on 2015
 - In 2017, we have seen significant increases amongst males but females have stayed static

[Read more ...](#)



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33% OF GB HOUSEHOLDS NOW OWN A SMART TV



Tech Tracker Q1 2017 reveals that ownership of Smart TVs in GB households has seen a significant rise of 8% year-on-year from Q1 2016.

Key findings include:

- Overall, 33% of GB households own a TV with the internet built in. This increase is likely to be driven by sales during the Christmas period of 2016 (Q4 '16), which puts ownership of smart TVs above iPads among GB adults.
- The number of GB adults visiting social networking sites continues to rise steadily quarter on quarter.
- Access to social networking sites via a smartphone has continued its upward trend, catching up to and slowly overtaking access via PCs or laptops. Visitation to individual sites is steady, with Facebook still the most popular by some way (62% of GB adults vs. 25% for Instagram, the nearest competitor).

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INTERNATIONAL



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The MENA region has some of the highest internet penetration figures in the world and a proliferation of high end devices. This report shares the consumer perspective of services in Saudi Arabia, Egypt and United Arab Emirates.

In parallel, operators have invested heavily in fixed and mobile broadband services to be able to deliver high quality experiences to customers.

To date, the distribution of video content in the region has been dominated by satellite TV operators. The appetite for video content is phenomenal, with Saudi Arabia famously having some of the highest per capita consumption figures for online video anywhere in the world.

Key facts from this report:

- 62% paid for digital content in 2016 (vs 59% in 2015)
- 38% cited movies as the content type paid for by subscription in 2016, ahead of sports (34%) and TV series (25%)
- Of those that mention a brand for consuming video content, YouTube is most mentioned with 73%
- 71% use their smartphone to consume content

[Read more ...](#)

A CONSUMER PERSPECTIVE

OTT AND PREMIUM ONLINE VIDEO

SERVICES IN MENA



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FLAIR PERU 2017: FROM INFORMALITY TO MODERNITY



The latest report in our Ipsos Flair series is on Peru, a country looking to the future.

Peru is quite optimistic

A new president for Peru was elected in July 2016 and it seemed that everything might (finally) be possible! In September, 61% thought things were heading in the right direction; three months later, the score had fallen to 50%. But it's not so bad! The world average indicates that 63% believe their country is on the wrong track.

Peru is trying to review the informal areas of its economy

Almost 70% of the working population form part of this "informal economy". In the short term there are some issues that could be addressed through incentives to form registered legal businesses that could create more jobs for low-skilled workers with a low impact on the public budget.

Peru is relatively happy

70% of Peruvians claimed that they felt happy most of the time, amongst which the people of Lima and the eastern regions of the country stood out.

[Read more ...](#)



Ipsos Flair Collection

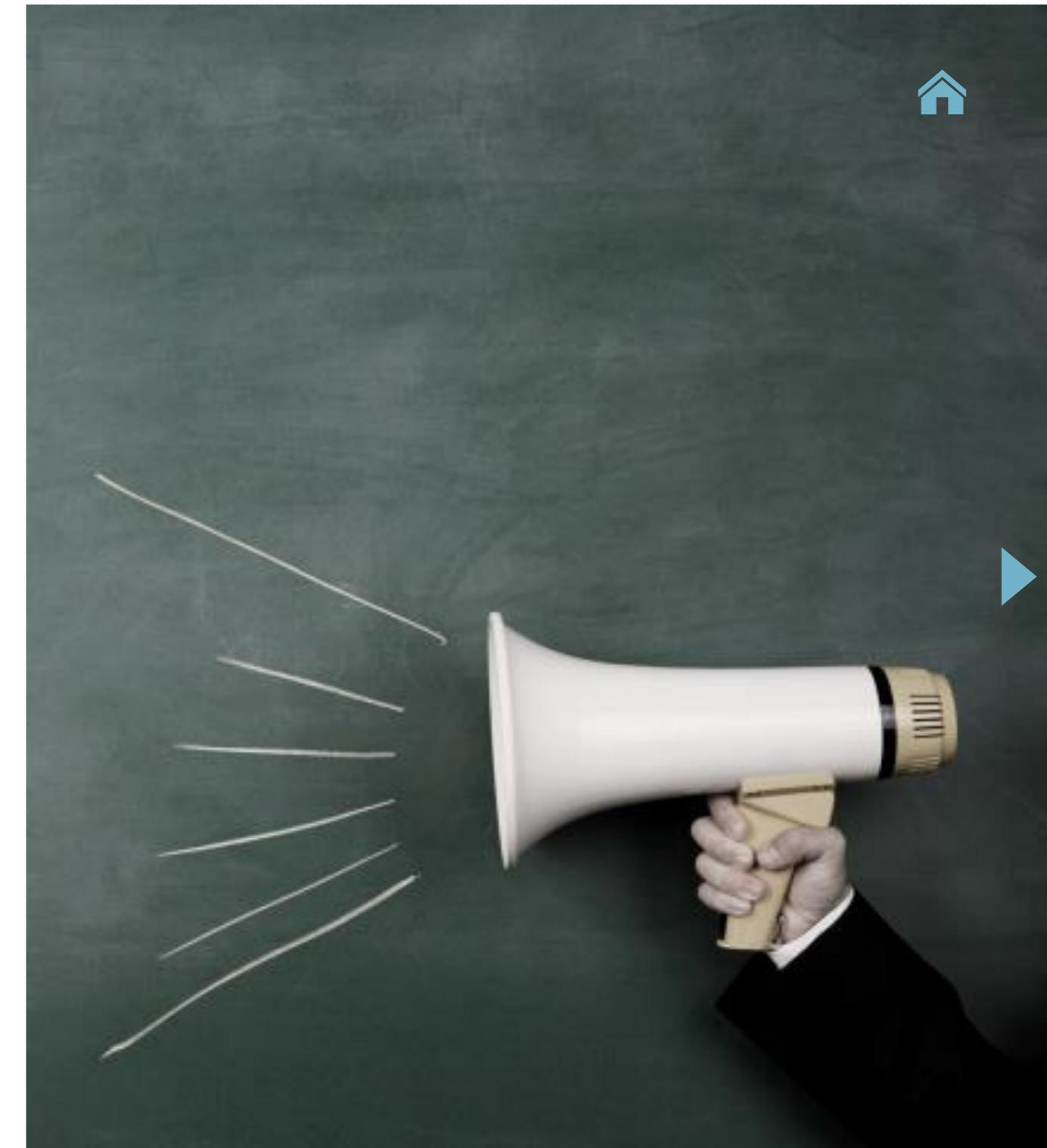


Peru 2017:
From informality
to modernity
10 key points





OPINION





Is the public really engaged with the sharing economy?

Research conducted by the Ipsos MORI Reputation Centre suggests that awareness and usage of Sharing Economy sites is much lower than might be expected.

[Read more ...](#)

Data privacy and security: what are the real concerns?

Leo Cremonezi's explores how much we value our privacy and the protection of our personal information.

[Read more ...](#)

What role will the NHS play in the 2017 election?

Ben Page in BMJ magazine looks at how public attitudes to the NHS might affect the general election campaign.

[Read more ...](#)



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