

- **Just 33% think the Government is doing a good job at handling Britain's exit from the European Union**
- **Most countries think their population is much more Muslim than it actually is**
- **Nurses are the most trusted profession in Britain**

# **Ipsos MORI Highlights**

**December 2016**

# WELCOME TO DECEMBER HIGHLIGHTS

And that was 2016. Britain exits the year with only 37% thinking the country is heading in the right direction, down from 44% in September. A similar 33% think the government is handling Brexit well, but more are negative. As concern about Brexit has risen, it is now seen as the most important issue facing the UK by the public – ahead of immigration and the NHS, but the public remain pretty much as divided as they were on 23<sup>rd</sup> June.

Despite this Theresa May's personal ratings remain strong (51% satisfied), ahead of her government. The Labour Party and Jeremy Corbyn can not be said to have had a good year, and only 21% expect him to have a good 2017 either.

Elsewhere we look at who we trust to tell the truth – for the first time doctors have been knocked off top spot, but only by nurses. Trust in journalists and politicians both fell, in the case of politicians to 15%. Given our challenges, trust in pollsters also suffered in 2016, but remains at 49%, a healthy score compared to business leaders.

December saw the release of [our annual Perils of Perception study](#). In 2016, where "post-truth" is the word of the year, it is fascinating to see that people all over the world believe their fellow citizens are more miserable than they actually are, massively over-estimate the number of Muslims in their country (Americans believe 17% are Muslim, 1% actually are) and generally expect the majority to be much less liberal than they actually are,



on all sorts of dimensions, from abortion to homosexuality. We think knowing more about where the public are out of kilter with the "facts" matters.

For public policy people we look at housing, social care, cancer and the plight of the Roma across Europe.

We review 2016 in full in our annual [Almanac](#) which you can download inside, with articles on everything from polling Brexit, feminism, brands and customer experience to Donald Trump.

All that remains is for me to wish all our clients and friends a very happy Christmas and a peaceful and successful 2017.

A handwritten signature in black ink that reads "Ben Page".

**Ben Page**  
**Chief Executive, Ipsos MORI**

# IPSOS MORI'S DECEMBER HIGHLIGHTS



## POLITICS

- Britons predict a good year ahead in 2017 for Theresa May, Sadiq Khan and themselves
- Britons happy with May's handling of Brexit – but not so much with her government or Boris Johnson
- Public support for devolution wanes post-Brexit



## SOCIETY

- The Ipsos MORI Almanac 2016
- Further decline in Britons thinking country going in right direction
- The EU and Brexit is seen as the most important issue facing Britain
- Enough of experts? Ipsos MORI Veracity Index 2016
- Crime/thriller books most popular among Scots



## INTERNATIONAL

- Perceptions are not reality: what the world gets wrong
- New survey shows Brexit vote slightly dents UK's reputation among EU nations
- 80% of Roma are at risk of poverty



## ECONOMY & BUSINESS

- Online shopping driving change in travel behaviour



## HOUSING

- Research estimates the scale, scope and cost of the supported housing sector



## HEALTH

- Unmet social care needs and well-being
- Perceptions of the cancer registry



## MEDIA, BRANDS & COMMUNICATIONS

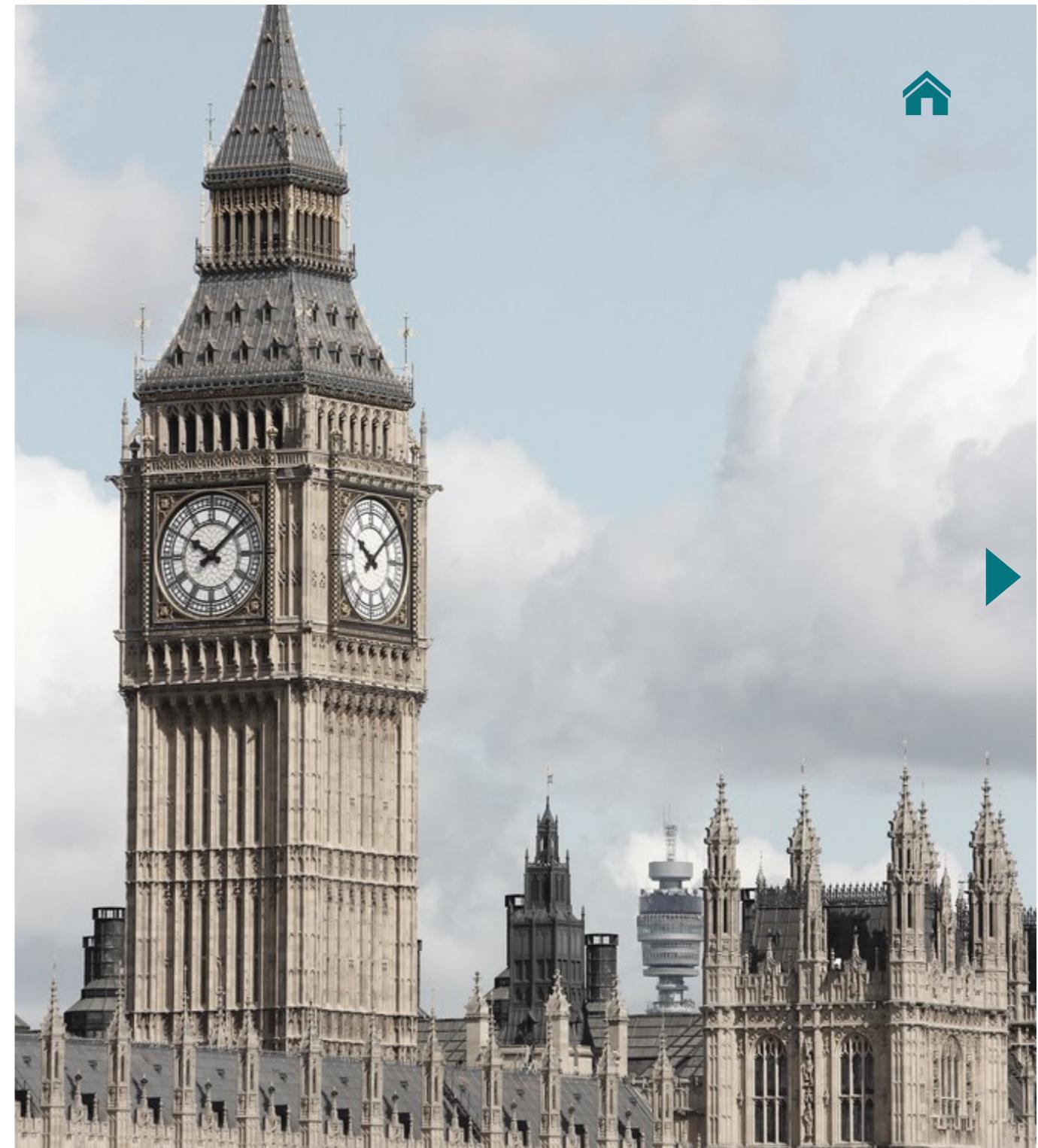
- 80% of 16-34 year olds use a smartphone in their purchase journey
- Device agnostic: why you need to transform now
- It's about time: measuring media impact
- Is love all that matters?



## OPINION

- Ten things to know about Europe in 2016

# POLITICS



# BRITONS PREDICT A GOOD YEAR AHEAD IN 2017 FOR THERESA MAY, SADIQ KHAN AND THEMSELVES



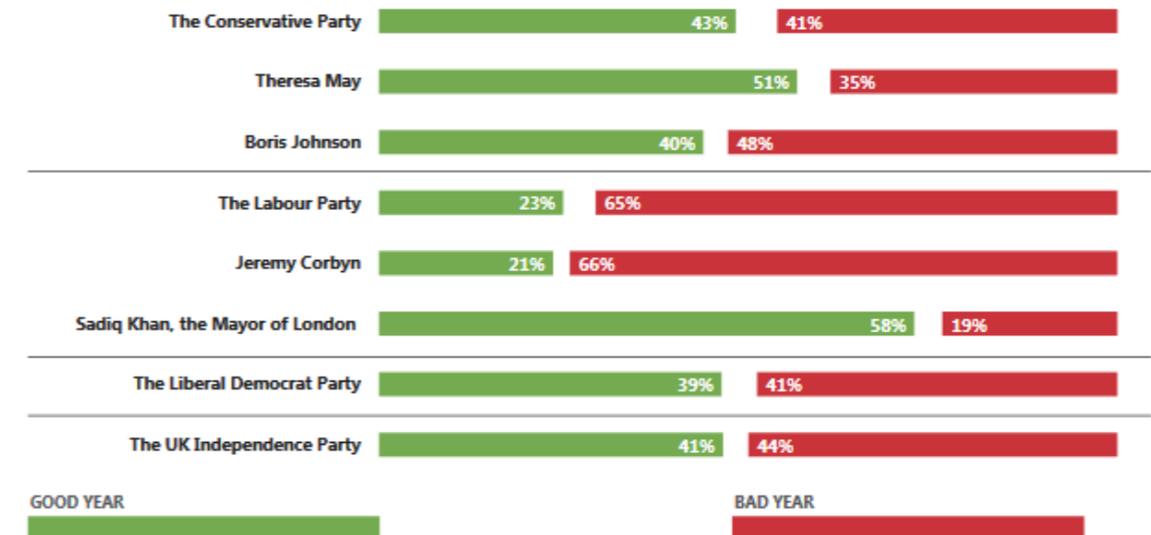
As an eventful year draws to a close Ipsos MORI's latest Political Monitor reveals who Britons think will enjoy good fortune in 2017.

Key findings include:

- Half (51%) believe 2017 will be a good year for Prime Minister Theresa May (35% think a bad year) including three in four (74%) Conservative supporters.
- Just one in five (21%) however believe it will be a good year for opposition leader Jeremy Corbyn with two in three (66%) believing he will have a bad year. This pessimism for Mr Corbyn is also evident with supporters of the Labour party where 46% think he will have a bad year and 42% good.
- Despite positive prospects for Theresa May the public are split when considering her party with 43% thinking it will be a good year for the Conservatives and two in five (41%) thinking it will be bad.
- It is not doom and gloom for all of Labour however as a majority (58%) think 2017 will be a good year for London Mayor Sadiq Khan (19% think a bad year) climbing to three in four (73%) Londoners.

[Read more ...](#)

And looking ahead to 2017, do you think it will be a good year or bad year for each of the following?



Base: 1,003 British adults 18+, 9<sup>th</sup> December – 12<sup>th</sup> December 2016

# BRITONS HAPPY WITH MAY'S HANDLING OF BREXIT – BUT NOT SO MUCH WITH HER GOVERNMENT OR BORIS JOHNSON



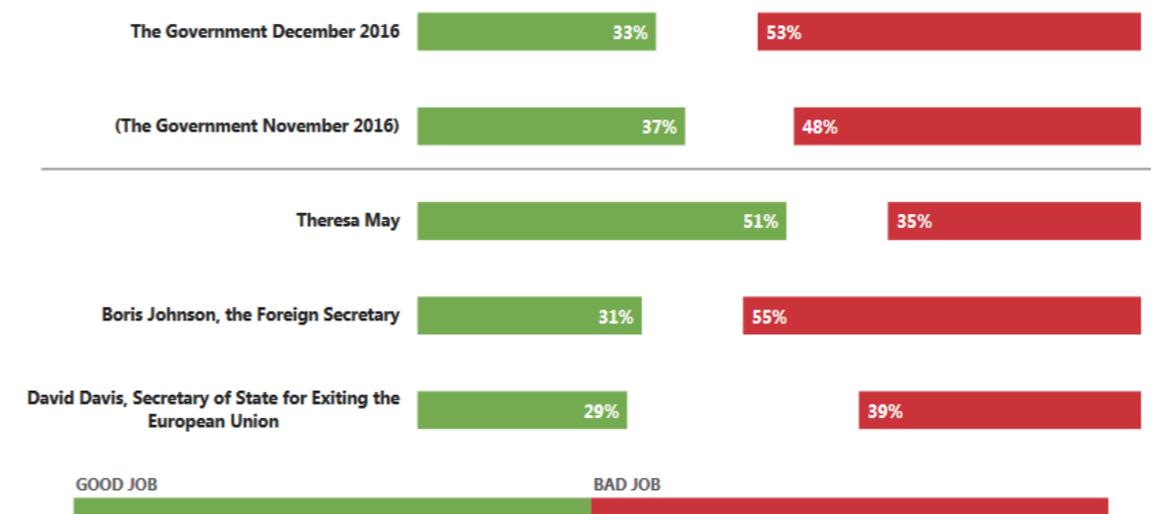
The final Ipsos MORI Political Monitor of the year reveals some public concern over the Government's handling of Brexit despite approval of Theresa May being high.

Key findings include:

- Just one in three (33% - down from 37% in November) think the Government is doing a good job at handling Britain's exit from the European Union while a majority (53%) think it is doing a bad job.
- Although most (51%) believe the Prime Minister herself is doing a good job at handling Brexit few have faith in the chief members of her team responsible for pulling Britain out of Europe.
- Three in ten (31%) say Foreign Secretary Boris Johnson is doing a good job at handling Brexit (55% say he's doing a bad job) while three in ten (29%) say the same for David Davis, the Secretary of State for Exiting the European Union (39% say a bad job – but 32% don't know).
- Both parties appear split over Britain's exit from the European Union in the eyes of the public. Two-thirds (67%) agree that the Conservatives are divided over the issue, while 64% say the same of Labour.

[Read more ...](#)

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



Base: 1,003 British adults 18+, 9<sup>th</sup> December – 12<sup>th</sup> December 2016

# PUBLIC SUPPORT FOR DEVOLUTION WANES POST-BREXIT



**A new poll from Ipsos MORI North reveals that there has been a significant decrease in the number of British people who support the devolution of power from central Government to local councils.**

Key findings include:

- Support has fallen from 49% in 2015 to 40% in 2016. There has also been a slight rise in the number of people in the UK opposing devolution, from 16% to 20%.
- Levels of support for devolution are higher in the North of England compared with other regions, with 44% of those residing in the region declaring support for the principle (compared with 38% in the Midlands and 34% in London).
- Of all the English regions, it is the North West which is most positive, with nearly half of the public (49%) in support.
- When asked about the new Government's commitment to devolution, feelings are mixed. There is an almost equal split between those who agree that the Government is committed (21%) and those who disagree (20%).

[Read more ...](#)



# SOCIETY



# THE IPSOS MORI ALMANAC 2016



**Our review of life, business and society in Britain and around the world in 2016.**

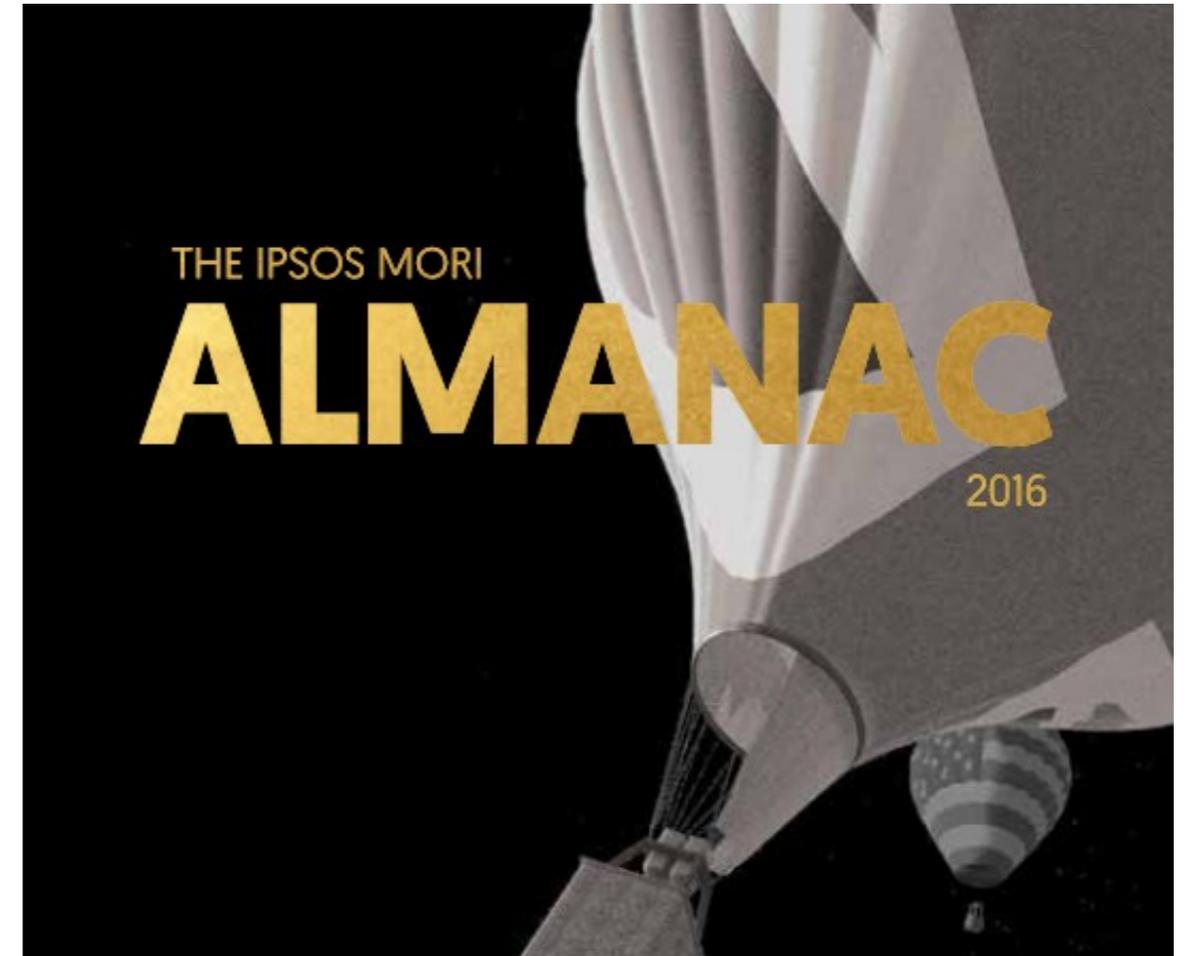
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What a year! At one point we were worried that we wouldn't have much to write about in this year's Ipsos MORI Almanac, but 2016 is a massive reminder that history never moves in straight lines. Millions of words have – and will – be devoted to explaining what drove Britain to Brexit and America to Trump – we cover both here. Inevitably we look at the art, science and judgement involved in political polling, which forms 0.1% of our work, but attracts most of the publicity.

Join us as we look at all aspects of life in Britain and further afield, from first dates, men in makeup, virtual reality, sugar and dieting, the best and worst politicians, celebrity deaths, what you are doing on your phone, immigration, the NHS and much much more.

We hope you enjoy this year's edition via the link below.

[Read more ...](#)



# FURTHER DECLINE IN BRITONS THINKING COUNTRY GOING IN RIGHT DIRECTION



“What Worries the World” is a monthly online survey of adults aged under 65 in 25 countries. It finds the percentage of people who think things are going in the right direction in their country has dropped 2% since last month to 37%.

## Direction of travel

The study also shows countries in the BRIC and APAC regions tend to be the most optimistic. China is the single most optimistic country, with 90% saying things are headed in the right direction.

## What worries the world

When looking at the issues which drive this sentiment in the 25 countries, the number one worry this month is again **employment** – (38% across all countries say this worries them) but this has been slowly declining since the study started in 2010, when it was 51%. Spain is the country most worried about unemployment (70%), with Italy close behind (65%).

## Gender optimism gap

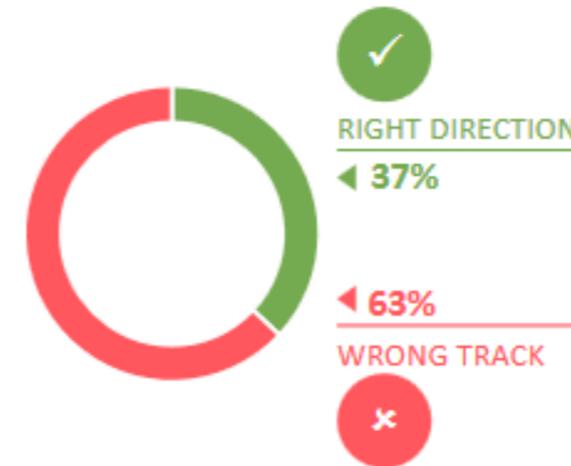
Looking at the findings split by gender, the research finds men are more optimistic than women that things in their country are going well. The biggest confidence gaps between men and women are in the US, Israel and Russia.

[Read more ...](#)

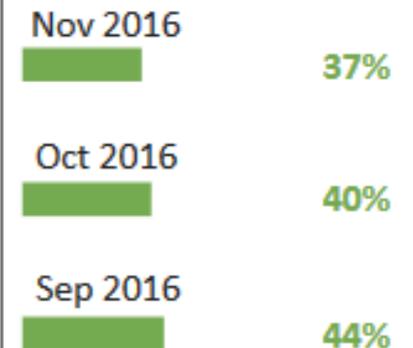
Generally speaking, would you say things in this country are heading the right direction, or are they off on the wrong track?

World summary: October 2016

## RIGHT DIRECTION/ WRONG TRACK November 2016



## RIGHT DIRECTION



Base: Representative sample of adults ages 16-64 in 25 participating countries. c. 1,000 per month

# THE EU AND BREXIT IS SEEN AS THE MOST IMPORTANT ISSUE FACING BRITAIN



The Ipsos MORI/Economist Issues Index shows that this month the public think concerns about the EU and Britain's exit are the leading issue facing Britain.

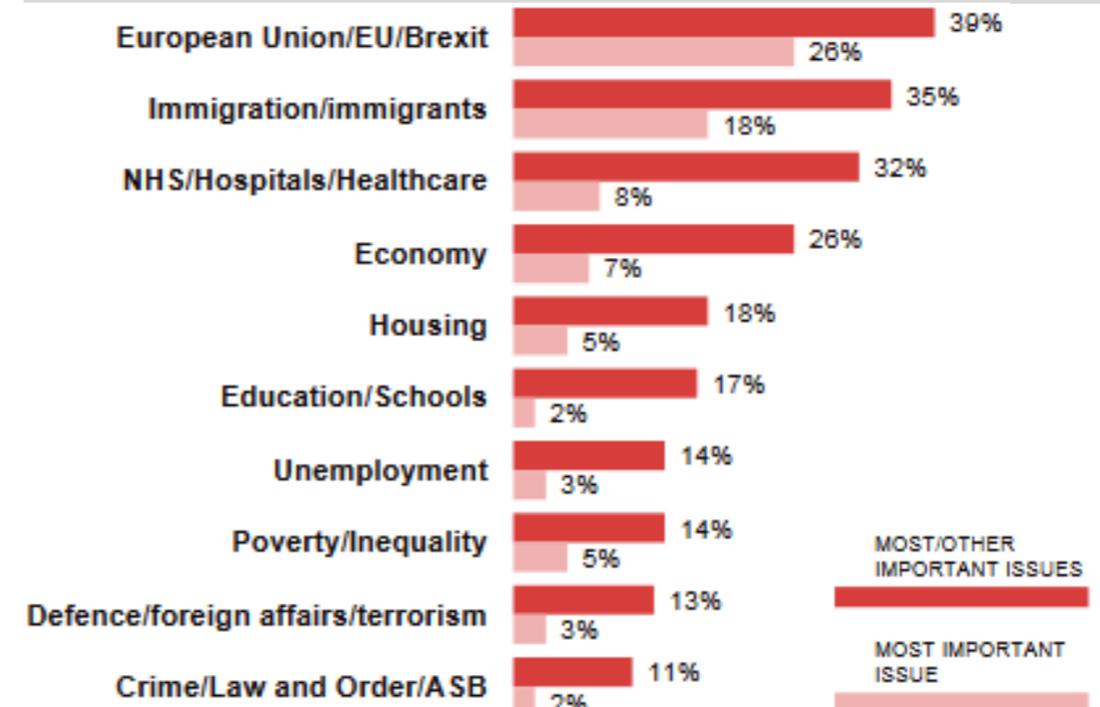
Key findings include:

- At 39%, concern has risen seven percentage points since October, and now stands just one percentage point behind the level recorded in July this year, when concern reached the highest level since April 1997 in the immediate aftermath of the Brexit vote.
- Concern about both immigration and the NHS make up the rest of the top three: this month 35% mention immigration as an important issue and 32% say the NHS.
- The EU and Brexit is also seen by the largest proportion as the single biggest issue facing Britain – one quarter (26%) feel that concerns about Brexit are the single biggest issue, compared to 18% who mention immigration and eight per cent who say the same for the NHS.

[Read more ...](#)

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

Top mentions %



Base: 973 British adults 18+, 4<sup>th</sup> – 24<sup>th</sup> November 2016



**A joint report from Mumsnet and Ipsos MORI uses our 2016 Veracity Index and online focus groups of Mumsnet users to explore their opinions about trust, truthfulness, information and experts during the EU referendum campaign.**

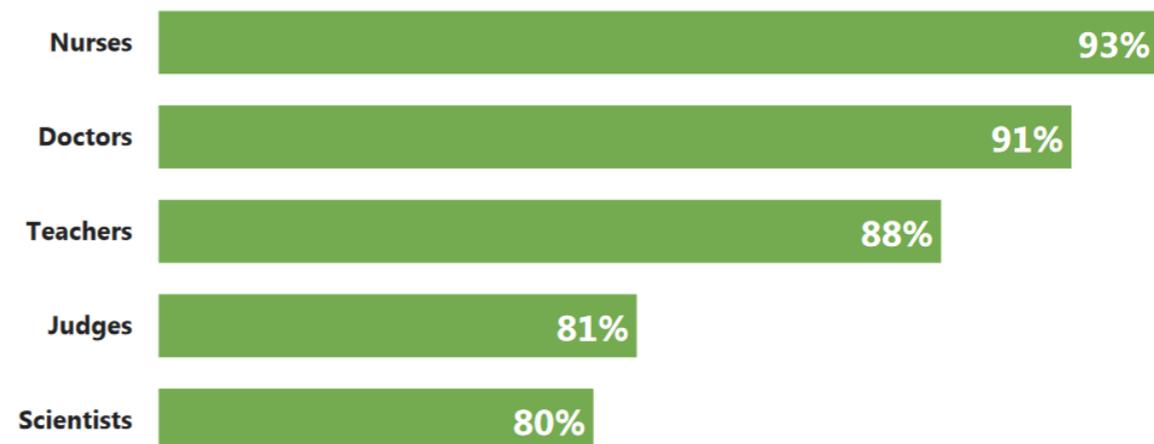
Key findings include:

- Public trust in politicians has slipped a considerable six percentage points since last year, and they are now trusted to tell the truth by just 15% of the British public.
- Nurses, included in the study for the first time are trusted to tell the truth by 93%, while doctors, are trusted by 91%;
- Government ministers are the second least trusted profession (20%), and have less credibility with the public than journalists (24%), estate agents (30% - five percentage points higher than 2015) and bankers (37%); women's trust in journalists is significantly lower than men's, with journalists being trusted by 28% of men but 21% of women;
- There has been an increase in distrust in pollsters this year, to 42% (49% say they trust them) and there have also been rises in distrust in civil servants and business leaders.

[Read more ...](#)

## The five most trusted professions in 2016

% trust to tell the truth:



Base: 1,019 British adults 15+, 14<sup>th</sup> October – 1<sup>st</sup> November 2016

# CRIME/THRILLER BOOKS MOST POPULAR AMONG SCOTS



**As the latest Book Week Scotland launches on 21 November, Ipsos MORI Scotland's new poll for The Scottish Book Trust has revealed that crime/thriller books are the most popular among Scots.**

Key findings include:

- Around a quarter (27%) of the 8 in 10 Scots who read for pleasure said that books which fictionalise crime topped their reading or listening material.
- The next most popular genres were science fiction/fantasy and biography/autobiography (both 10%) and historical fiction (9%).
- While the crime genre was the most popular among readers of all ages, the second most popular genre among young readers (aged 16-34) was science fiction/fantasy (15%), while readers aged 55 and over chose historical fiction as their second preference (14%).

[Read more ...](#)



# INTERNATIONAL



# PERCEPTIONS ARE NOT REALITY: WHAT THE WORLD GETS WRONG



The Ipsos 2016 Perils of Perception survey highlights how wrong the public across 40 countries are about key global issues and features of the population in their country.

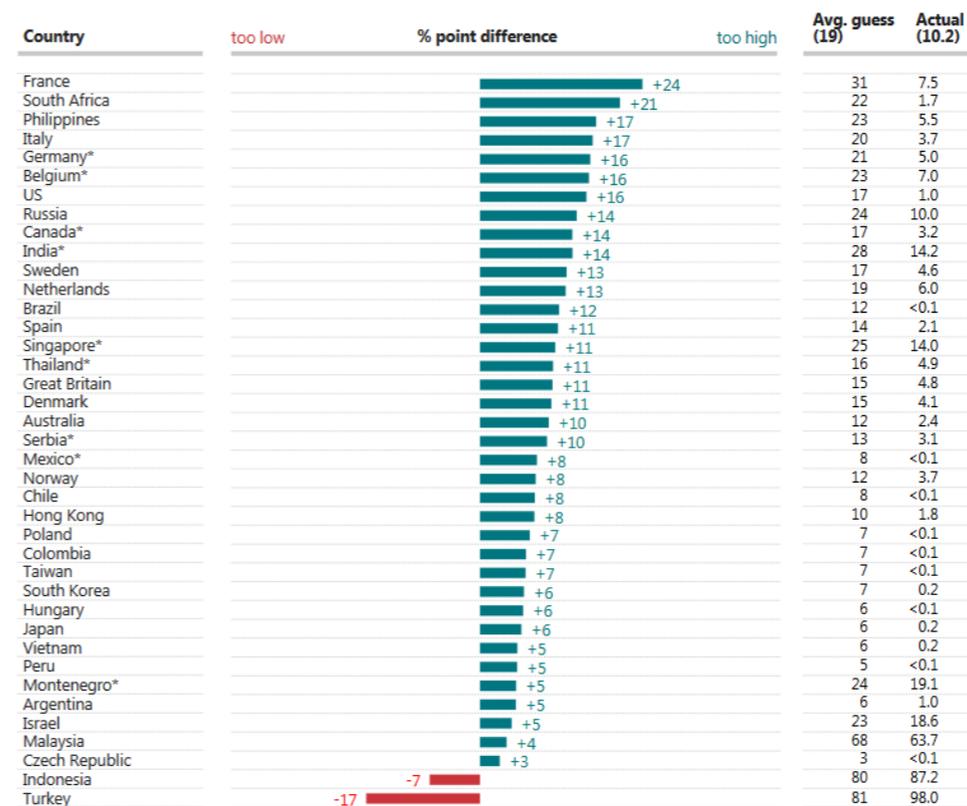
The key patterns are:

- Most countries think their population is much more Muslim than it actually is – and that the Muslim population is increasing at an incredible rate
- All countries think their population is less happy than they actually say they are
- Most countries are more tolerant on homosexuality, abortion and pre-marital sex than they think they are
- And nearly all countries think wealth is more evenly distributed than it actually is.

Follow the link below for the full story – including the opportunity for you test your own knowledge via this year's Perils Quiz.

[Read more ...](#)

## Out of every 100 people, about how many do you think are Muslim?



The 'actual' data for this question is largely from Pew Research Center. Instances where the 'actual' data comes from another source are indicated with an asterisk (\*). Please see <http://perils.ipsos.com/> for full details of all sources.

# NEW SURVEY SHOWS BREXIT VOTE SLIGHTLY DENTS UK'S REPUTATION AMONG EU NATIONS



**Ipsos MORI surveyed nearly 40,000 18-34 year olds across the G20 nations on behalf of the British Council, to measure perceptions of the UK pre- and post-Brexit.**

Overall, the largest group of respondents either say that the Brexit vote makes no difference to their views of the UK, or they have no opinion either way (answering "don't know").

Among those who think Brexit has impacted their opinion, negative views outweigh positive views across the EU nations. For the rest of the G20 it is the other way around, with a net positive impact being registered.

Findings that illustrate the UK's decision to leave the EU has caused some damage to its reputation among young people in the EU nations of the G20 include:

- 36% say that Brexit has a negative impact on the UK's attractiveness
- 41% say that Brexit has a negative impact on their trust in the UK government
- 32% say that they are less likely to do business with the UK
- 30% say they are less likely to study in the EU

[Read more ...](#)



# 80% OF ROMA ARE AT RISK OF POVERTY



**A report by the European Union Agency for Fundamental Rights (FRA), based on research conducted by Ipsos, looked into the lives of Roma families in Europe.**

Key findings include:

- 80% of Roma interviewed are at risk of poverty compared with an EU average of 17%. 30% live in households with no tap water and 46% have no indoor toilet, shower or bathroom.
- 30% of Roma children live in households where someone went to bed hungry at least once in the previous month.
- 53% of young Roma children attend early childhood education, often less than half the proportion of children their age from the general population in the same country.
- Only 30% of the Roma surveyed are in paid work, compared with the average EU employment rate for 2015 of 70%.

[Read more ...](#)



# ECONOMY & BUSINESS



# ONLINE SHOPPING DRIVING CHANGE IN TRAVEL BEHAVIOUR



**The RAC Foundation commissioned Ipsos MORI to ask a nationally representative sample of adults about their shopping behaviour.**

Key findings include:

- In the last three months, two thirds (66%) of adults aged 16-75 made journeys in a personal vehicle to go shopping at least once a week. Around 1 in 5 (20%) did this every 2-3 days or more.
- Compared to 12 months ago, 1 in 6 adults (17%) are making trips in a vehicle to go shopping less often.
- Of those making fewer journeys in a personal vehicle to go shopping compared to one year ago, 23% say this is because they are doing more shopping online, while 22% are travelling by other means and 21% report they are doing less shopping nowadays. 1 in 5 (20%) say they can't afford to go shopping as much as they used to.
- More than 8 in 10 (82%) adults who purchase books/CDs/DVDs online use home delivery methods to receive these items. In comparison, 7 in 10 adults who shop for groceries online use home delivery methods (71%).

[Read more ...](#)



# HOUSING



# RESEARCH ESTIMATES THE SCALE, SCOPE AND COST OF THE SUPPORTED HOUSING SECTOR



**Ipsos MORI has been commissioned by the Department for Work and Pensions and Department for Communities and Local Government to develop a robust evidence base on the scale, scope and cost of the supported housing sector.**

Key findings from the research include:

- The review estimates that at the end of 2015, there were approximately 651,500 accommodation-based supported housing units in Great Britain. The majority of which (85%) are in England, with nine per cent in Scotland and six per cent in Wales.
- An estimated 71 per cent of units across Great Britain accommodate older people; 29 per cent of units accommodate working age people with a very wide range of support needs. Housing associations are the most prevalent landlords, providing 71 per cent of supported housing units.
- The review estimates the annualised cost of the supported housing sector that is covered by Housing Benefit across Great Britain at the end of 2015 at £4.12bn.
- The review also conservatively estimates that the additional annualised spend on support and care services (that is in addition to Housing Benefit spend) at the end of 2015 is around £2.05bn.

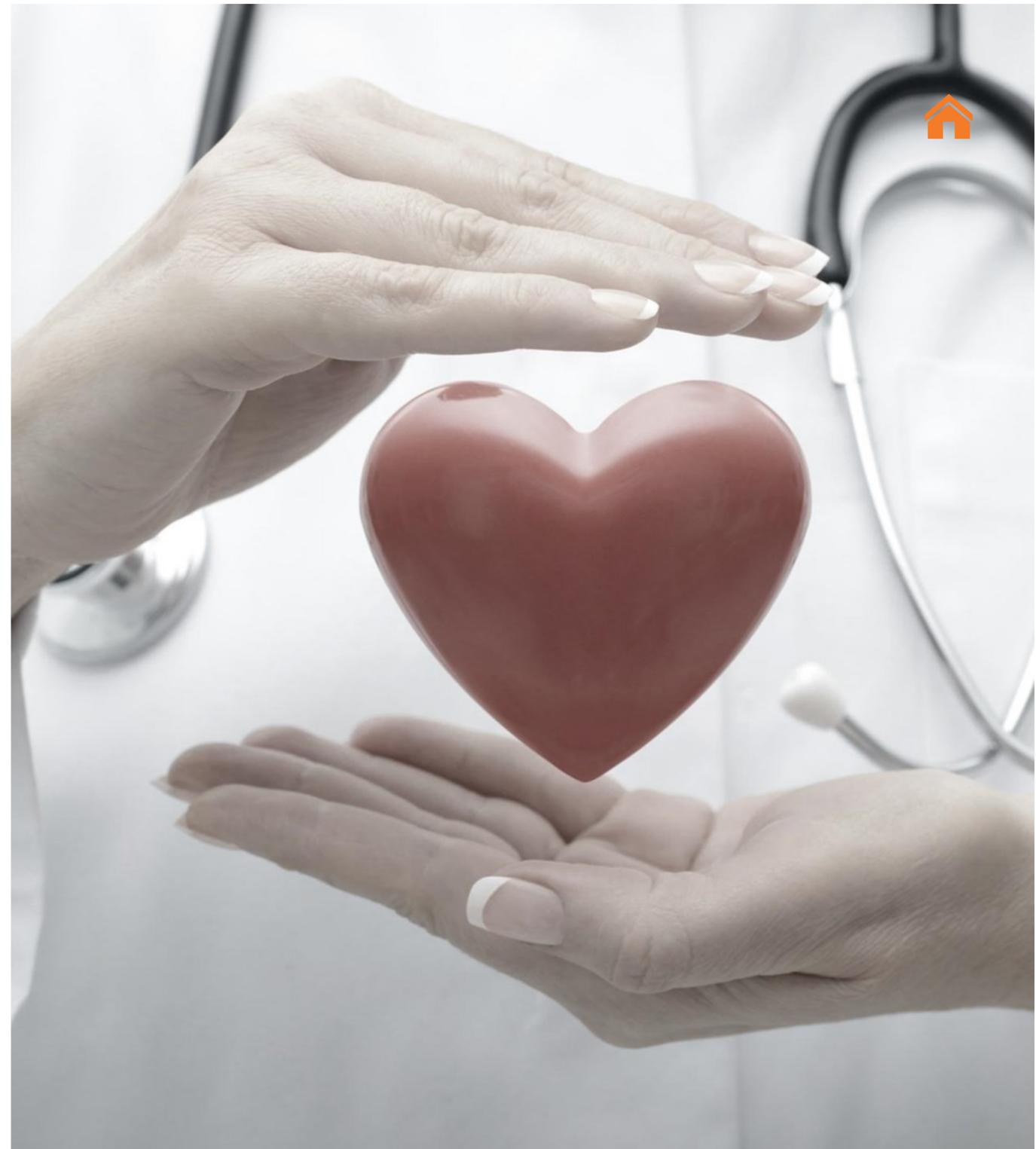
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# HEALTH



Ipsos MORI



# UNMET SOCIAL CARE NEEDS AND WELL-BEING



**This independent research funded by the National Institute for Health Research explores the issue of unmet need for social care among older people.**

There are increasing pressures on demand for and supply of help and support for older people who have difficulties with the activities needed for independent living. The Care Act 2014 places new responsibilities on local authorities to assess the needs of unpaid carers, to prevent the development of needs and to ensure the maintenance of well-being in service users and carers.

This research explores the issue of unmet need:

- the nature of unmet need for social care among older people and how it can be measured;
- the prevalence of unmet need for social care in England;
- the factors which predict an individual developing unmet social care needs over a ten year period; and
- the links between unmet need for social care and well-being.

[Read more ...](#)



# PERCEPTIONS OF THE CANCER REGISTRY

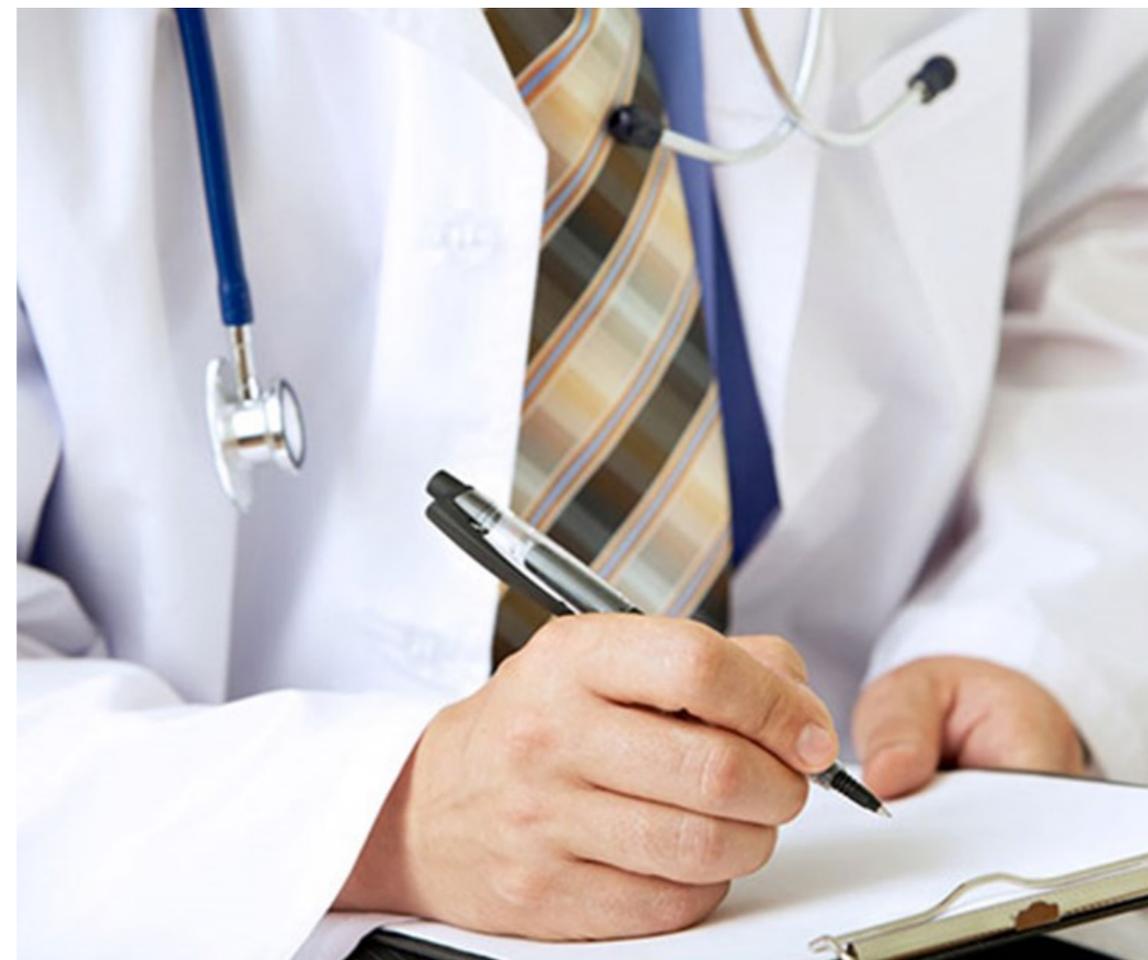


**Cancer Research UK and Macmillan Cancer Support commissioned Ipsos MORI to find out what people living with cancer and the general public think about the process of cancer data collection.**

Key findings include:

- Two-thirds of people living with cancer (65%), and half of the general public (52%) support the current method of data collection for the cancer registry, which involves patients who have received a cancer diagnosis in England being automatically included in the cancer registry.
- Respondents were also informed that people can remove their data from the cancer registry if they get in contact and request this.
- The majority of people living with cancer and the general public think it is important that cancer patients should be informed about the cancer registry (83% and 86%, respectively), though currently awareness among patients and public is low (6% of people living with cancer have heard a great deal or a fair amount about the cancer registry; 3% of general public).

[Read more ...](#)



# MEDIA BRANDS & COMMUNIATIONS



# 80% OF 16-34 YEAR OLDS USE A SMARTPHONE IN THEIR PURCHASE JOURNEY



**Ipsos Connect's Tech Tracker is a quarterly, GB nationally representative research survey which measures the emerging trends and developments in technology.**

Key findings include:

- 80% of 16-34 year olds used a smartphone during their purchase journey but only 40% of 35+ year olds do the same.
- They prefer using either a PC, laptop or tablet. 40% of 16-34 year olds have used a smartphone to buy a product, this number drops to 15% for 35+.
- Overall, GB households who use a smartphone during their purchase journey are most likely to buy clothes via this device (56%).
- Internet usage remains high with nearly 90% but continues to be significantly lower for the lowest social grade and those over 65.
- Only 35% of DE females have accessed the internet in the last 3 months. This group is unsurprisingly also among those least likely to own a smartphone (16%) with only males from the same social grade being less likely to own one (14%).

[Read more ...](#)



# DEVICE AGNOSTIC: WHY YOU NEED TO TRANSFORM NOW



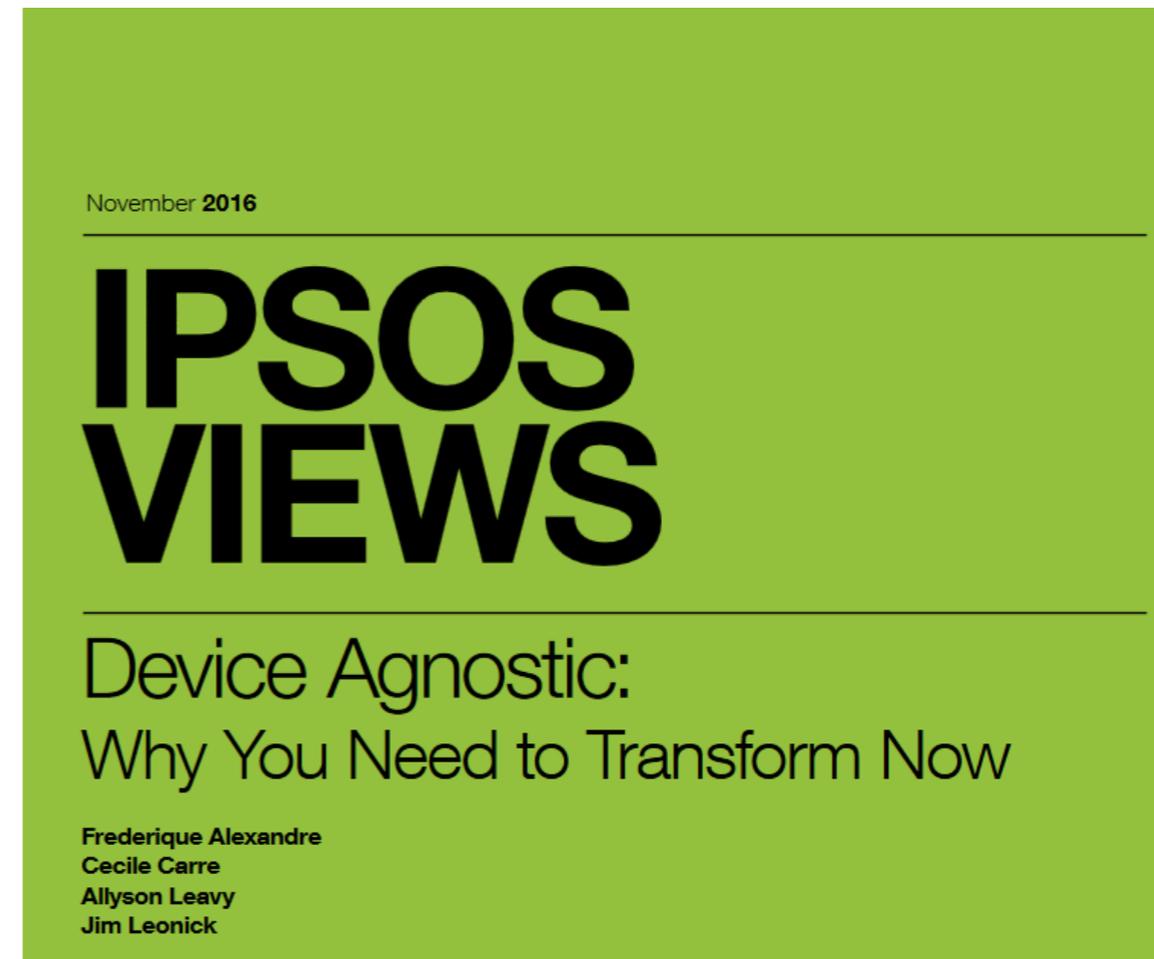
**Device agnostic is no longer the future of online research. It's happening now. Marketers must adapt quickly or risk losing touch with their consumers.**

Simply stated, device agnostic surveys are designed to allow participants to complete them on their device of choice: from the smallest smartphone through tablets, PCs, smart TVs and gaming consoles. Migrating to device agnostic is not just about using a new technical platform, it actually requires a new way of thinking about research. Device agnostic is forcing us to develop shorter, sharper, more refined questionnaires which will ultimately improve the quality of consumer insights.

Key discussions include:

- How do you transform traditional surveys into device agnostic surveys?
- Can you trust device agnostic results?
- Device agnostic is improving the way we do research
- Device agnostic is today, not tomorrow

[Read more ...](#)



# IT'S ABOUT TIME: MEASURING MEDIA IMPACT



## It's time to revisit our media audience metrics.

In this new white paper, Andrew Green looks at how we can further develop our media measurement toolkit.

He starts with Reach: an important measure, but not sufficient on its own to truly differentiate media options. Definitions of media reach vary between and amongst media types. All measure "opportunities to see" an advertising message rather than actual exposure.

Andrew goes on to look particularly at the concept of "Time" – a hard, quantifiable, gauge of media attention, which can be applied to any medium.

What is clear is that advertisers need to consider a range of measures (reach, frequency, time spent, attentiveness) when deciding where to invest their marketing budgets.

[Read more ...](#)

## It's About Time: Measuring Media Impact

Andrew Green

# IS LOVE ALL THAT MATTERS?



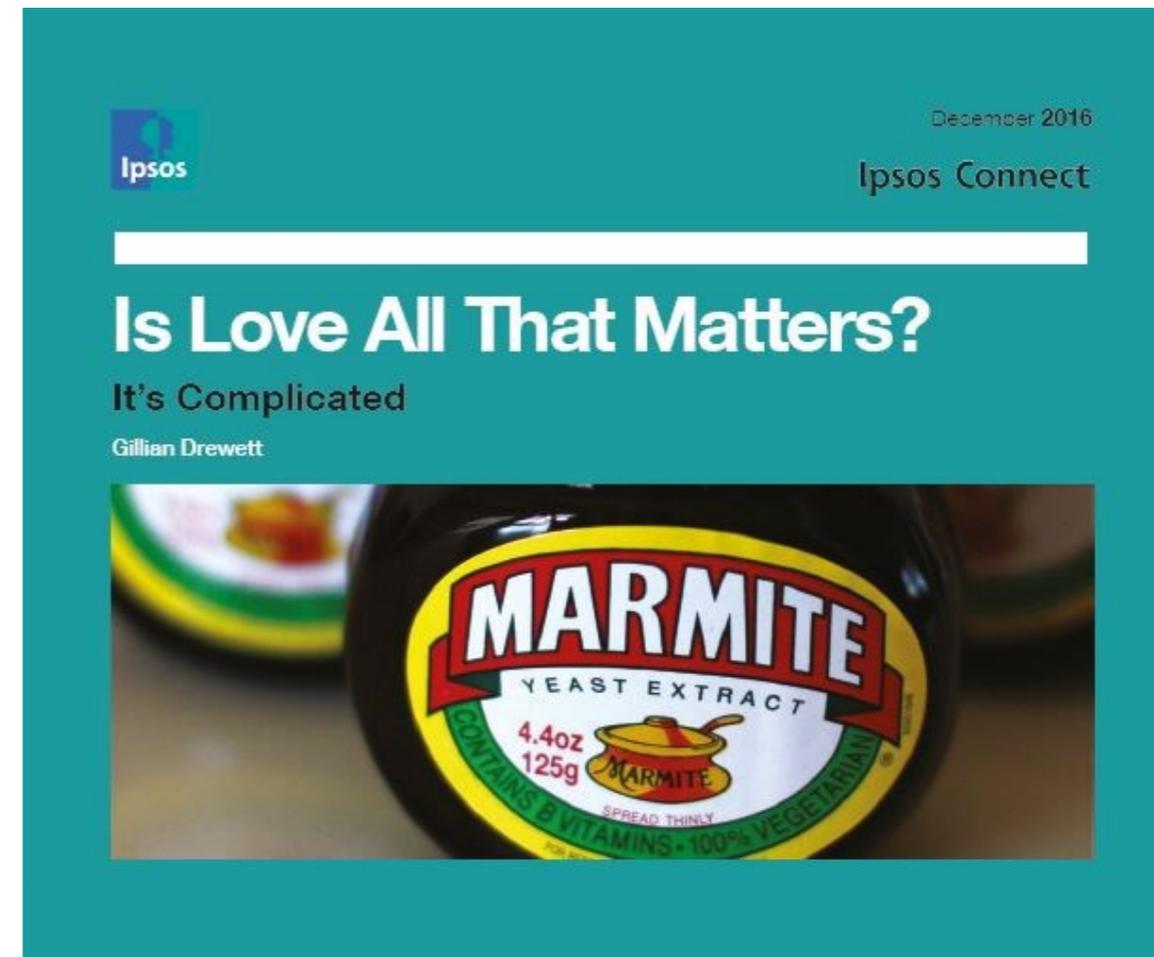
**Sometimes the relationships people have with brands are complicated.**

Here we take a look at Marmite – one brand where the relationship status is very simple – you either love it or you hate it. Or so the marketing would have us believe!

As consumers, each of us has in our minds complex mental networks of associations with respect to different brands. The 'brand mental network' is a rich picture of our unique mix of experiences, associations, impressions, shape, colour and so on. How then, in the complex world of brand desire, does a brand stand out and get chosen?

In this thought piece, Gillian Drewett investigates the relationships between people and brands, with a look at #Marmitegate. What happens when our normal patterns (availability of product, price...) are disrupted, and we have to re-evaluate how important the product is for us?

[Read more ...](#)



# OPINION





## Ten things to know about Europe in 2016

It's not just Britain which has had a tumultuous year. Simon Atkinson takes a look at Ipsos' research across Europe and finds 10 things which each tell us something about how 2016 felt to our European neighbours. Ten Things To Know About Europe In 2016.

[Read more ...](#)

## In conversation with ... Ben Page

Ben Page is the guest interviewee in the latest podcast from the Centre for Public Impact on the reform of public services.

[Read more ...](#)

## Where does Labour go from here?

In a guest blog, David Cowling ponders on what the polls tell us about the Labour Party under Jeremy Corbyn.

[Read more ...](#)



## Public attitudes towards spending cuts - have we reached a tipping point?

Sara Davidson writes for Scottish Policy Now on what latest survey data tells us about attitudes to austerity.

[Read more ...](#)

## CONTACT US



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All methodological details are available via the website links



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