



Ipsos MORI Highlights

February 2017

**Theresa May's honeymoon continues as
Jeremy Corbyn's struggles with public
opinion worsen**

**Concern about the NHS jumps to the
highest level since 2003**

**Europe still seen as most important
relationship for Britain**

**Six in ten around the world think their
society is 'broken' – new in-depth study
on the rise of Populism**



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WELCOME TO FEBRUARY HIGHLIGHTS

In British politics Theresa May continues her extended honeymoon with the public, picking up a by-election victory in Copeland that is unprecedented in the last few decades. Jeremy Corbyn now has 51% of Labour voters – let alone swing voters – unhappy with his performance.

Talk of a populist surge in western democracies may be over-blown. Our new global in-depth study on populism released this month shows that Brexit and Trump are not signs of a decisive switch to right-wing authoritarianism and protectionism. Yes, there is a widespread anti-politician sentiment globally, and a widespread belief that their society is 'broken'. However, our global study shows that Britain is very much middle of the road on most measures, with the French most enthusiastic for a 'strong leader who breaks the rules', and Germans and Spanish least. Ironically it is the mainstream Conservative party, not the insurgent UKIP, who seem to be benefiting from Brexit so far. Globally, support for free trade remains strong, even if many countries remain anxious about immigration.

This month we look again at Britain's relationship with Europe – despite no sign of a divided public changing their mind on Brexit, they continue to see Europe as more important than the USA to Britain, a position that is unchanged since the beginning of the century. The public feel that Trump SHOULD have been invited for a state visit to Britain, despite protests, and despite having a negative opinion of him.

Elsewhere we take a closer look at China, Australia and Columbia, and domestically at the role of immigration and innovation in the NHS, which is now the British public's number one concern.

We look at how to build emotional connections with your customers – always the best sort – as well as whether monumental or incremental decision making is best – and a host of other issues.

Please let me know what you think and anything you'd like to see in future.



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IPSOS MORI'S FEBRUARY HIGHLIGHTS



POLITICS

- Theresa May's honeymoon continues as Jeremy Corbyn still struggles with public approval
- Europe still seen as most important relationship for Britain
- Trump should have been invited but not give a speech in parliament
- Public attitudes to Brexit



SOCIETY

- Six in ten around the world think their society is 'broken'
- National Youth Social Action Survey 2016
- Smart metering energy efficiency advice project



HEALTH

- Concern about the NHS jumps to the highest level since 2003
- Understanding Society - A healthy understanding? Global attitudes to health
- Public willing to raise charges for visitors using the NHS from outside the UK to increase funding
- Health security survey for the Bill & Melinda Gates Foundation



MEDIA, BRANDS & COMMUNICATIONS

- Incremental versus monumental decision-making
- Radio's relevance in the age of streaming



ECONOMY & BUSINESS

- Digital innovation in banking
- Emotional attachment and profitable customer relationships
- The British Business Bank 2016 Business Finance Survey



INTERNATIONAL

- Ipsos Flair: Colombia 2017, Reviving
- China Pulse
- Australians want more action on climate change



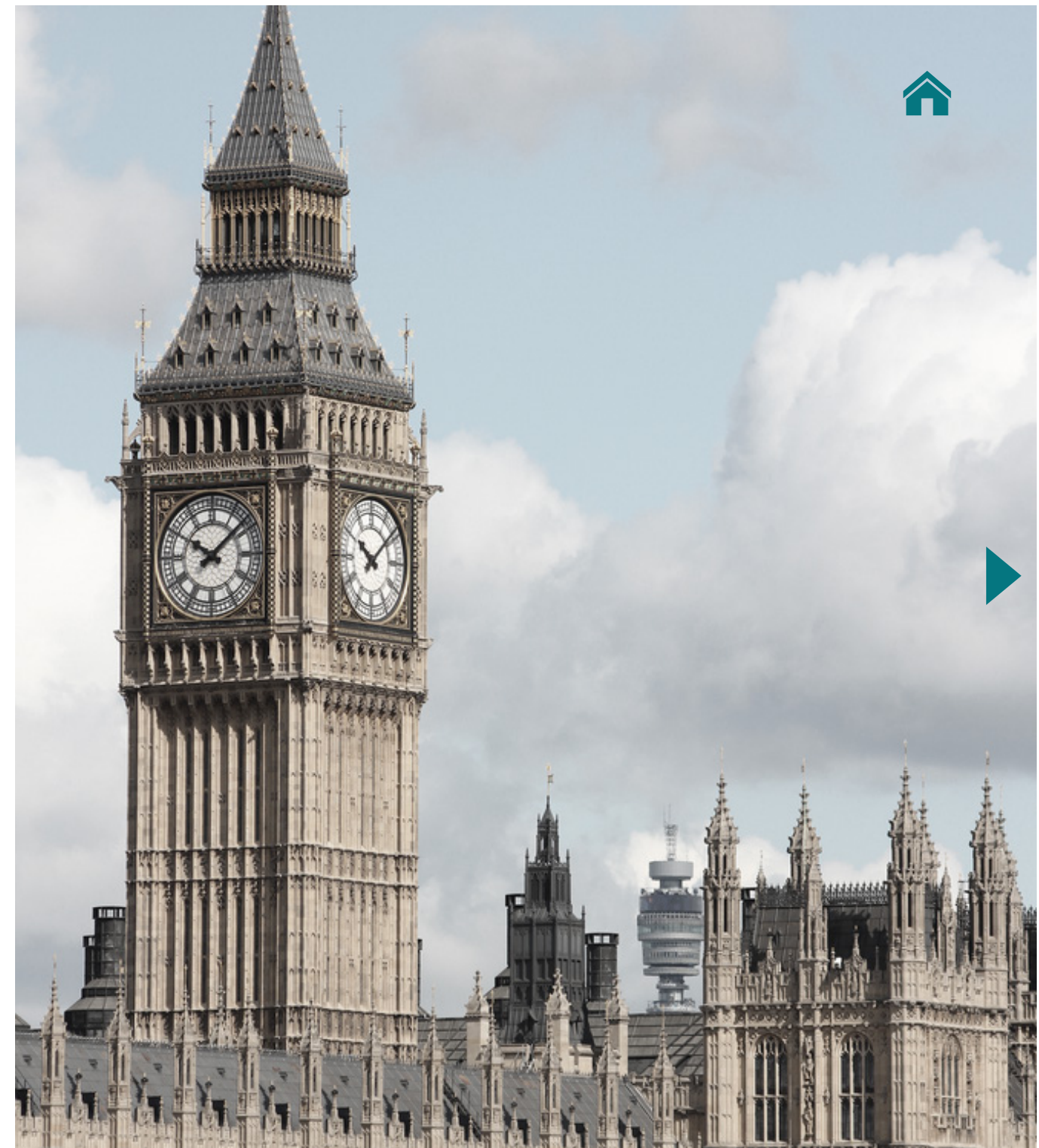
OPINION

- Making an experience real
- Carers and GP services – What does the GP patient survey say?
- Hooray. The client 'worm' is finally turning

POLITICS



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THERESA MAY'S HONEYMOON CONTINUES AS JEREMY CORBYN STILL STRUGGLES WITH PUBLIC APPROVAL



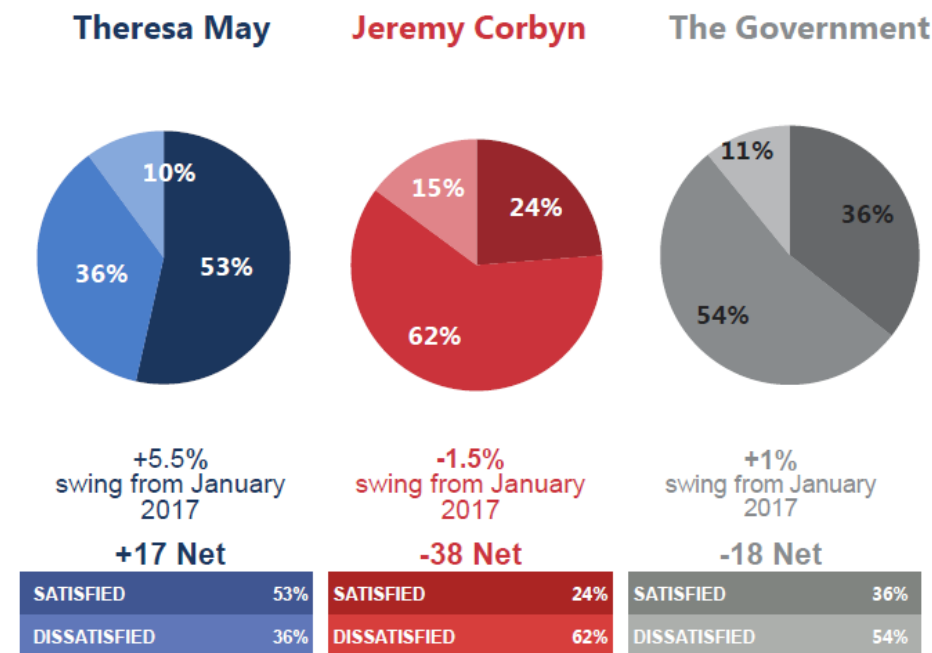
The Prime Minister's honeymoon is yet to end as Theresa May continues to have strong backing from the British public according to the latest Political Monitor.

Key findings include:

- More than half (53%) of the public satisfied with her performance (up 8 points). One in three (36%) said they were dissatisfied with her (down 3 points) leaving Ms May a net satisfaction score of +17 (up 11 points).
- The poll also shows little change in Labour Leader Jeremy Corbyn's ratings as he continues to make little progress with the public. One in four (24%) say they are satisfied with Mr Corbyn doing his job (down 2 points) and 62% dissatisfied (up 1 point) leaving him a net satisfaction score of -38.
- Most Britons remain pessimistic over the state of the British economy. Twenty-eight percent believe that it will improve over the next 12 months (up 1 point) while 44% say it will get worse (down 3 points) leaving an Economic Optimism Index score of -16 (up 4 points).

[Read more ...](#)

Are you satisfied or dissatisfied with the way.... Is running the country/doing his/her job as Prime Minister/leader of the Labour Party/leader of UKIP/leader of the Liberal Democrats ?



Base: 1,044 British adults 18+, 10th – 14th February 2017. Swing is calculated as the average of change in % "satisfied" and % "dissatisfied"

EUROPE STILL SEEN AS MOST IMPORTANT RELATIONSHIP FOR BRITAIN



Even after the vote to leave the European Union in June last year, Europe is still seen as the most important relationship for Britain compared with America or the Commonwealth.

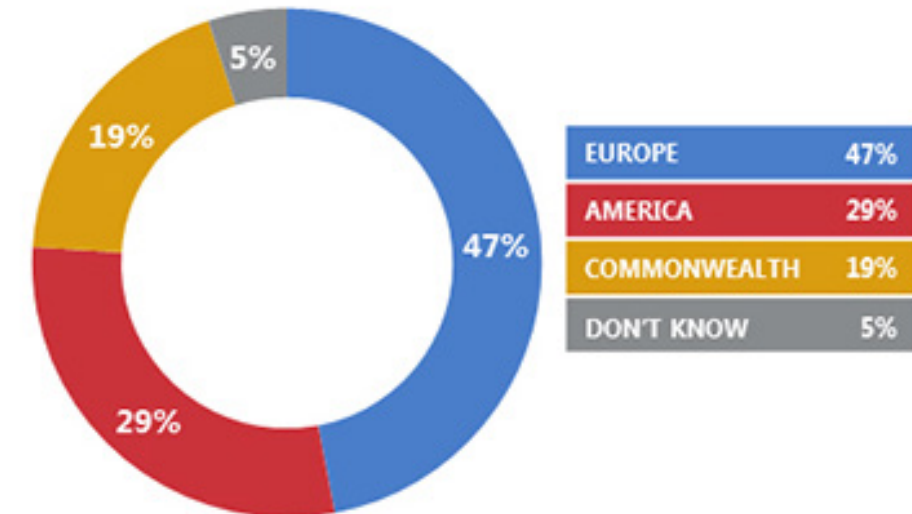
Key findings include:

- Half (47%) of the public chose Europe as most important to Britain, compared with three in ten (29%) who chose America and one in five (19%) who say it is the Commonwealth.
- Europe has consistently been seen as most important to Britain since the 1980s, while America has been seen as more important than the Commonwealth since the turn of the millennium (with the exception of a drop in 2014).
- Angela Merkel and Donald Trump are seen as the most important by the public with 26% picking the German Chancellor and 24% the American President.
- Jean-Claude Juncker, President of the European Commission, was also seen as important (chosen by 17%) followed by Chinese President Xi Jinping (12%). Fewer picked Russian President Vladimir Putin (5%) while French President Francois Hollande ranked lowest (3%), perhaps a reflection that he only has weeks left in office.

[Read more ...](#)

Which of these – Europe, the Commonwealth or America – is the most important to Britain?

February 2017



Base: 1,044 British adults 18+, 10th – 14th February 2017.

TRUMP SHOULD HAVE BEEN INVITED BUT NOT GIVE A SPEECH IN PARLIAMENT



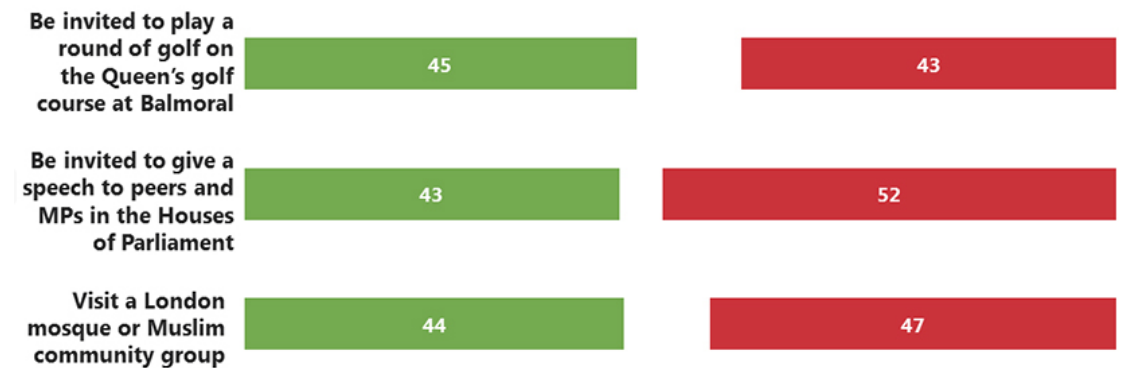
Despite controversy surrounding the proposed state visit of Donald Trump a majority of Britons say Trump should have been invited for an official state visit although should not give a speech in Parliament.

Key findings include:

- A slim majority of the public (53%) think that he should have been invited this year (42% think that he should not have).
- The state visit is divided along political lines with seven in ten (72%) Conservatives saying Mr Trump should have been invited (26% say he should not have) compared with 37% of Labour supporters (57% say he should not have).
- This month saw much discussion on what Donald Trump should do while in Britain. 52% believe that if he does visit he should not be invited to give a speech to peers and MPs in the Houses of Parliament (43% think he should) while Britons are split on whether or not he should visit a London mosque or Muslim community group (44% think he should and 47% think he should not).

[Read more ...](#)

And if Donald Trump does visit Britain later this year, do you think he should or should not ... ?



Base: 1,044 British adults 18+, 10th – 14th February 2017.

PUBLIC ATTITUDES TO BREXIT



Britain remains split on key Brexit issues and to date neither Remainers nor Leavers show signs of changing their minds.

Research commissioned by social entrepreneur Hugh Davidson, MBE, shows that eight months after the Referendum, only **4% of those who voted in the referendum would change their vote**, and there was no difference in this between Remainers and Leavers. So, no change to date.

The research also shows that there is generally **little trust in MPs or Lords**. Only 27% trust Peers 'a great deal'/'a fair amount'. MPs' score is slightly better at 33%.

When asked whether leaving the European single market would be better or worse for the UK economy over the next 5 years, 29% said 'better' and 39% 'worse' (the rest opted for 'no difference' or 'don't know').

On the House of Lords vote on **Article 50**, only **24%** thought either Peers should vote against the Government triggering this (12%), or impose the condition that it should negotiate to keep Britain in the single market (also 12%).

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SOCIETY



SIX IN TEN AROUND THE WORLD THINK THEIR SOCIETY IS 'BROKEN'



The majority of countries around the world think that their society is broken, while feeling a lack of confidence in establishment institutions - especially political parties, governments and the media.

Is there a sense of alarmism?

A majority in 17 of the 23 countries feel that 'society is broken' (and 58% on average), especially high in Poland, Spain, Brazil, and Mexico.

Confidence in institutions

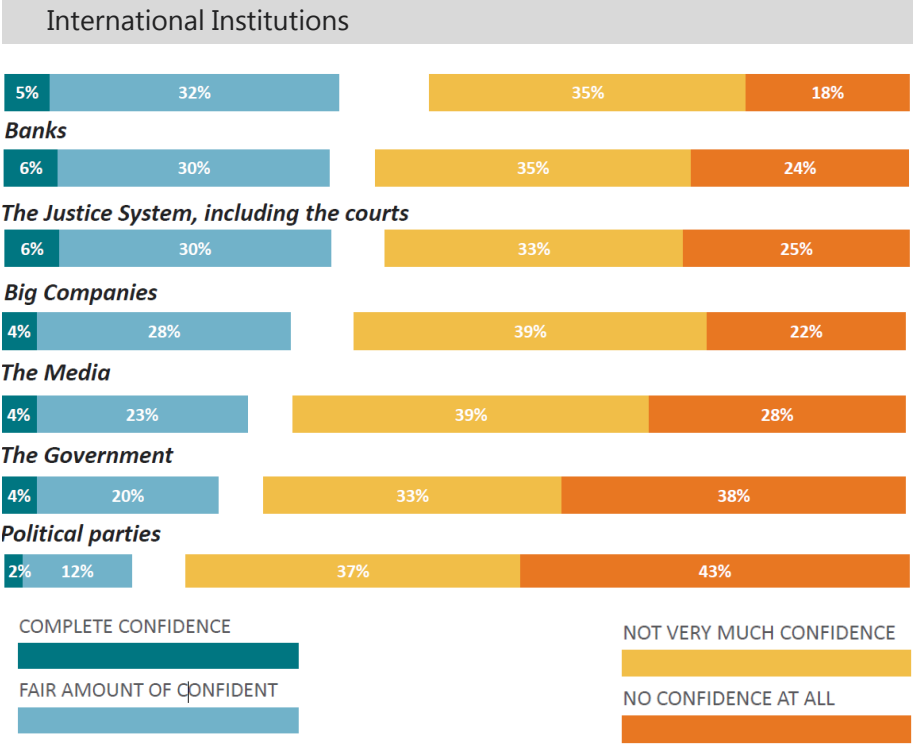
On average, eight in ten (81%) across the 23 countries lack confidence in political parties (a majority in every country), and 71% lack confidence in their government. In both cases, confidence is particularly low in Spain and Mexico.

Nativism/anti-immigration views

On average, a majority (56%) think that employers should prioritise hiring nationals over immigrants when jobs are scarce, especially in Serbia, Hungary, Turkey and Israel.

[Read more ...](#)

How much confidence, if any, do you have in each of the following...



Base: 16,597 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Hungary, India, Israel, Italy, Japan, Mexico, Peru, Poland, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., November 2016

NATIONAL YOUTH SOCIAL ACTION SURVEY 2016



The 2016 wave of the National Youth Social Action Survey from Step Up To Serve and the Office for Civil Society has been running alongside the #iwill campaign, which aims to close the socioeconomic gap in social action.

The #iwill campaign aims not just to increase participation rates, but also to ensure young people have opportunities to participate in high quality social action.

Key findings include:

- Overall rates of participation in social action among 10-20 year olds in the UK have been stable over the three years of the survey series: in 2016 42% had taken part in meaningful social action, which is statistically unchanged from the 40% recorded in 2014.
- A third (33%) of young people took part in social action programmes in the past year.
- The socio-economic gap is particularly evident when looking at participation in social action programmes; young people from affluent backgrounds are more likely than those from less affluent backgrounds to have been involved (42% ABC1 compared to 27% C2DE).

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SMART METERING ENERGY EFFICIENCY ADVICE



By 2020 every home in Great Britain should have been offered a smart meter. As part of the Smart Meter Installation Code of Practice installers are required to provide consumers with energy efficiency advice.

Ipsos MORI and Energy Saving Trust were commissioned by the Department of Energy and Climate Change to:

- Create, test and pilot an approach to delivering energy efficiency advice during the smart meter roll-out
- Explore the most appropriate forms of advice delivery for different types of customer, including vulnerable consumers
- Evaluate the piloted approach using feedback from customers and installers
- Generate recommendations for energy suppliers, advice providers and other stakeholders based on findings from the study

The interviews found early signs of impact, such as the changing of habitual behaviours. Using the in-home display (a device which shows real-time use of energy in the home) prompted many households to think more about their use of energy.

[Read more ...](#)



Department for
Business, Energy
& Industrial Strategy

Smart Metering Energy Efficiency Advice Project



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HEALTH



CONCERN ABOUT THE NHS JUMPS TO THE HIGHEST LEVEL SINCE 2003



The NHS has the highest level of concern since 2003 reflecting discussions of increased winter pressure. Whilst concern with the EU/Brexit also rises to a post-referendum peak.

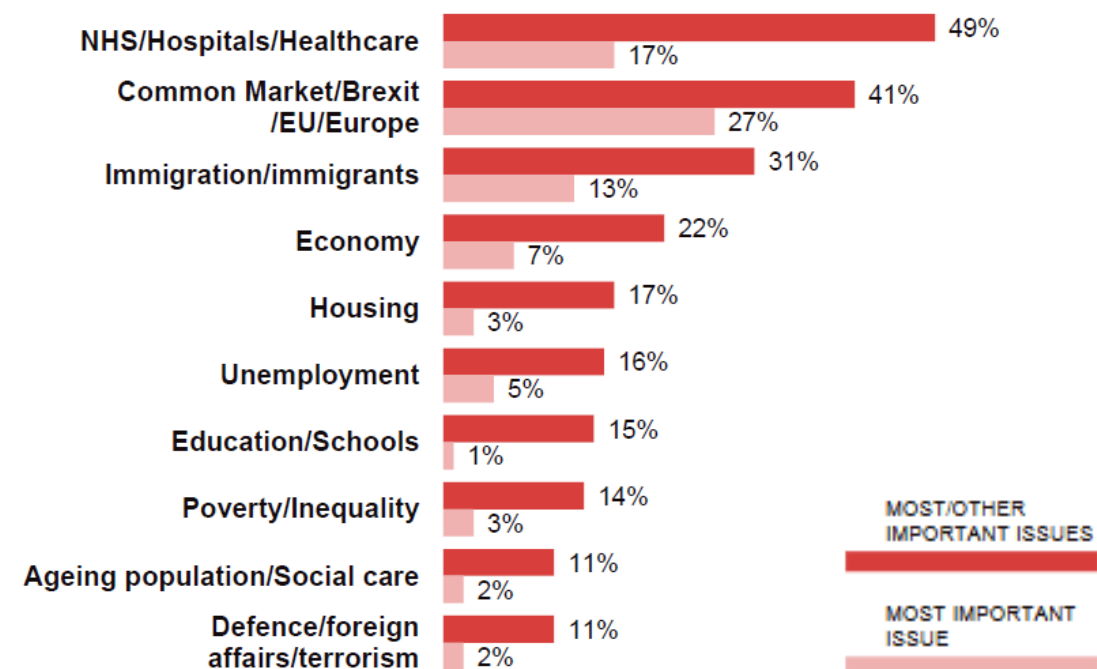
Key findings include:

- There is increasing public concern about the NHS, with almost half (49%) of the British public considering it to be one of the biggest issues facing Britain. Concern has risen nine percentage points since December, and is now at the highest level recorded since April 2003. Fieldwork occurred between 13th and 26th January 2017.
- The proportion seeing the EU/Brexit as a big issue has also risen strongly– now 41% see this as a concern, a similar level to July last year, in the immediate aftermath of the referendum result (40%). This month's result is also the highest score since April 1997.
- Still however, Brexit leads when the public are asked to name the single biggest issue facing Britain. On this measure, 27% of the public cite Brexit, and 17% say the NHS.

[Read more ...](#)

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

Top mentions %



Base: 970 British adults 18+, 15th January - 26th January 2017.

UNDERSTANDING SOCIETY - A HEALTHY UNDERSTANDING? GLOBAL ATTITUDES TO HEALTH



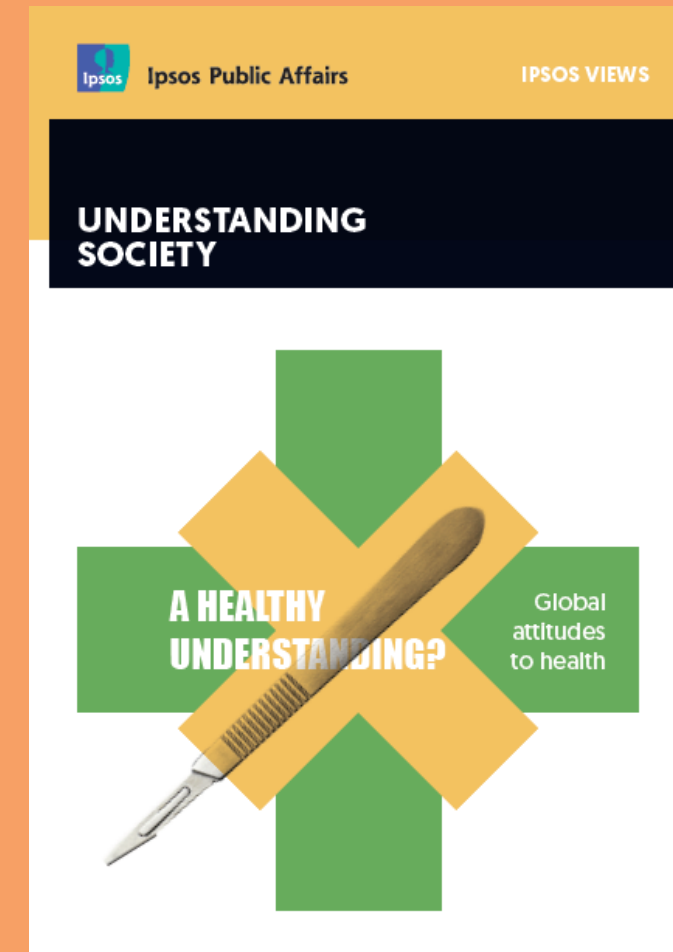
Welcome to this international edition of *Understanding Society*, which examines the state of health at both a national and global level, drawing together some of the research carried out in 30 countries.

The publication covers a wide range of health issues:

- Patient experience and expectations
- Behavioural interventions
- The importance of health literacy
- The increasing reality of exporting healthcare
- The opportunities and challenges of ageing populations
- And how Sustainable Development Goals (SDGs) tie many of these themes together

We are also delighted to have exclusive interviews with **Dr Flavia Bustreo**, from the World Health Organization (WHO) and **Duncan Selbie**, Chief Executive of Public Health England an executive agency of the UK's Department of Health that focuses on health improvement.

[Read more ...](#)



PUBLIC WILLING TO RAISE CHARGES FOR VISITORS USING THE NHS FROM OUTSIDE THE UK TO INCREASE FUNDING



Last month the Prime Minister admitted the NHS is under pressure. This poll suggests three-quarters of adults surveyed would find it acceptable to increase charges for people coming from abroad as a way of raising more money for the NHS.

The survey asked respondents to rate a number of ways in which some people suggested that funding for the NHS be increased to maintain the current level of care.

Key findings include:

- 40% say a rise in income tax would be acceptable while 50% say it would be unacceptable. 37% say charging for some services would be acceptable while 51% say it would be unacceptable.
- The public are split on whether the NHS should charge patients with diseases and illnesses caused by their lifestyle: 44% say this would be acceptable while 45% say it would be unacceptable.

[Read more ...](#)



HEALTH SECURITY FOR THE BILL & MELINDA GATES FOUNDATION



Adults in UK and Germany are more concerned about the spread of infectious disease than they are about war between with other nation states.

Key findings include:

- When thinking about global health and security, 71% of Britons aged 16-75 say they are concerned about the spread of infectious diseases like Ebola, Zika and deadly strains of 'flu on global health and security, compared to 67% who are concerned about wars with other nation states.
- 71% of Germans aged 16-70 say they are concerned about the spread of infectious diseases, compared to 73% who are concerned about wars with other nation states.
- Of all the issues asked about, violent terrorist attacks are the top concern (mentioned by 83% in the UK and 84% in Germany).
- Two-thirds (66%) of Britons and over half (55%) of Germans think it's likely there will be another epidemic like Ebola or Zika in the next couple of years.

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MEDIA BRANDS & COMMUNIATIONS



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RADIO'S RELEVANCE IN THE AGE OF STREAMING



Can radio survive during a time when increased connection speeds, low cost data bundles and unlimited free access has resulted in the explosion in popularity of streaming services?

Since Napster first appeared in 1999, music streaming has had a significant impact on audio consumption. But has it had the damaging effect on radio once foretold?

How can radio survive during a time when increased connection speeds, low cost data bundles and unlimited free access has resulted in the explosion in popularity of streaming services? What sets radio apart from the majority of automated, computer curated pseudo-stations?

Based on Ipsos data collected from RAJAR, Midas and Touchpoints we can see that the future of radio is not quite as bleak as many believe.

[Read more ...](#)



INCREMENTAL VERSUS MONUMENTAL DECISION-MAKING



We explore a new approach to decision-making which is based on a technology-enabled, phased research approach that delivers deep consumer insights that will fuel brand growth.

To ensure your brand stays relevant, you need to make decisions faster than ever before.

Instead of relying on a large-scale, time-consuming foundational study, you need to leverage rapid, multi-sourced digital information to make a succession of quick and impactful decisions - moving from a monumental brand decision to a series of incremental brand decisions.

In this paper, we will explore a new approach to decision-making which is based on a technology-enabled, phased research approach that delivers deep consumer insights that will fuel brand growth.

[Read more ...](#)

Incremental versus Monumental Decision-Making

How to Keep Up with the Pace of Business in the New Reality

Douwe Rademaker | Marco Vriens



ECONOMY & BUSINESS



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DIGITAL INNOVATION IN BANKING



Today's banks are feeling the squeeze from Silicon Valley's fast-moving Financial Technology pioneers. Is it time to outsource and let the tech pros take the reins?

Whether it's investing directly, staging special events or supporting promising start-ups and idea incubators, banks can stay ahead in the race to please customers, grow accounts and operate seamlessly by outsourcing innovation processes.

This white paper examines the trend of outsourcing, seen as the future of the banking industry, in which new tactics are being developed to externalise the innovation process.

Farming out innovation gives banks access to all the cutting-edge, customer-centric digital technology, bells, whistles and tools without sacrificing focus on their top priorities: security, regulation and integration of legacy systems.

Banking executives know their business best, and they say it doesn't make solid financial sense to pour dollars into risky innovation in-house. According to the bankers, the best solution is to outsource it.

[Read more ...](#)



EMOTIONAL ATTACHMENT AND PROFITABLE CUSTOMER RELATIONSHIPS



Roger Sant of Ipsos Loyalty discusses how to create a framework for assessing customers' emotional attachment to a brand and the value of this emotional attachment.

An individual's emotional connection to a brand undeniably plays an important role in their engagement and loyalty.

But is it possible to measure 'pure' emotions using rational questions?

By their nature, emotions are not things that one can rationalise.

Perhaps a more pertinent question is: Can we construct an emotional framework (via quantitative questions) that adds valuable insight to our clients?

And the answer is YES!

[Read more ...](#)



THE BRITISH BUSINESS BANK 2016 BUSINESS FINANCE SURVEY



The 2016 Business Finance Survey among SMEs, conducted by Ipsos MORI on behalf of the British Business Bank.

Awareness of different types of finance: Awareness of certain types of non-bank finance, such as P2P lending, continues to grow.

Finance use: 48% of SMEs have sought finance in the last three years - credit card finance, bank loans and overdrafts and leasing/HP are the most commonly sought.

Grant funding: Around one in ten SMEs recall obtaining grant funding in the last ten years. This funding type is viewed as difficult and time-consuming to obtain, and therefore many SMEs do not consider it when they need finance.

EU Referendum: While many SMEs have not changed their approach as a result of the referendum result, a majority reported being unsure of the impact and the view on balance is that it will have a negative rather than positive impact on sales, growth and accessing finance.

Perceptions of raising finance and future use: It remains the case that more SMEs perceive raising finance to be difficult rather than easy.

[Read more ...](#)

2016 Business Finance Survey: SMEs



A report by Ipsos MORI to the British Business Bank

February 2017



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INTERNATIONAL



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IPSOS FLAIR: COLOMBIA 2017, REVIVING

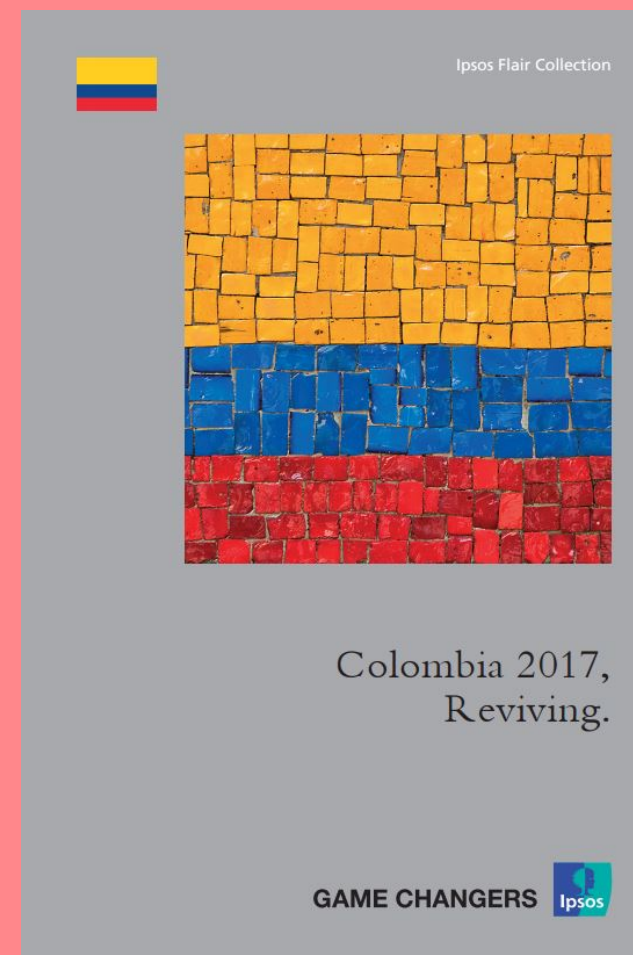


“Reviving” is the word of the year in Colombia and its people’s hopes and dreams, the latest report in our Ipsos Flair series takes a closer look at Colombia.

Despite 28% of the population living in poverty, conditions are now more conducive to seeing a new way ahead. Moving from wartime to peacetime consumption will influence Colombians and accelerate their maturity in respect of brands and communications.

1. Colombia is reviving. The Peace Agreement between the Government and the FARC put an end to 52 years of war and violence.
2. Colombia is on the right track to becoming a leading nation in the region. The Peace Agreement creates opportunities to develop road infrastructure and to reactivate agriculture and ecotourism in a country with such ecological diversity, to attract domestic and foreign investment.
3. Colombia has adapted well to technological advances. Together with Argentina and Chile, they are the leaders in penetration of cell phone technology: in 95% of homes, at least one person now has a mobile phone.

[Read more ...](#)





In a climate overwhelmed by entertainment and socialising, the public pays more attention to celebrities and stars than ever. The question is: how to select the right star spokesperson in marketing activities to maximise results?

In the latest edition of China Pulse, Ipsos Connect has analysed its advertising database to discover that 40% of ads have used celebrity spokespeople.

Using the RAPP Index – Recognition, Attraction, Presence, Polarisation – Ipsos assesses how the stars affect the popularity of the ads.

Also in this month's Pulse report:

- eye tracking techniques in advertising – TV still attracts the most consumers, with online video growing quickly
- reflections on marketing at the Rio Olympics – the popularity of the brand spokesperson makes the difference
- macro economic data from Q4 of 2016 – there was year-on-year GDP growth of 6.7% for China.

[Read more ...](#)



AUSTRALIANS WANT MORE ACTION ON CLIMATE CHANGE



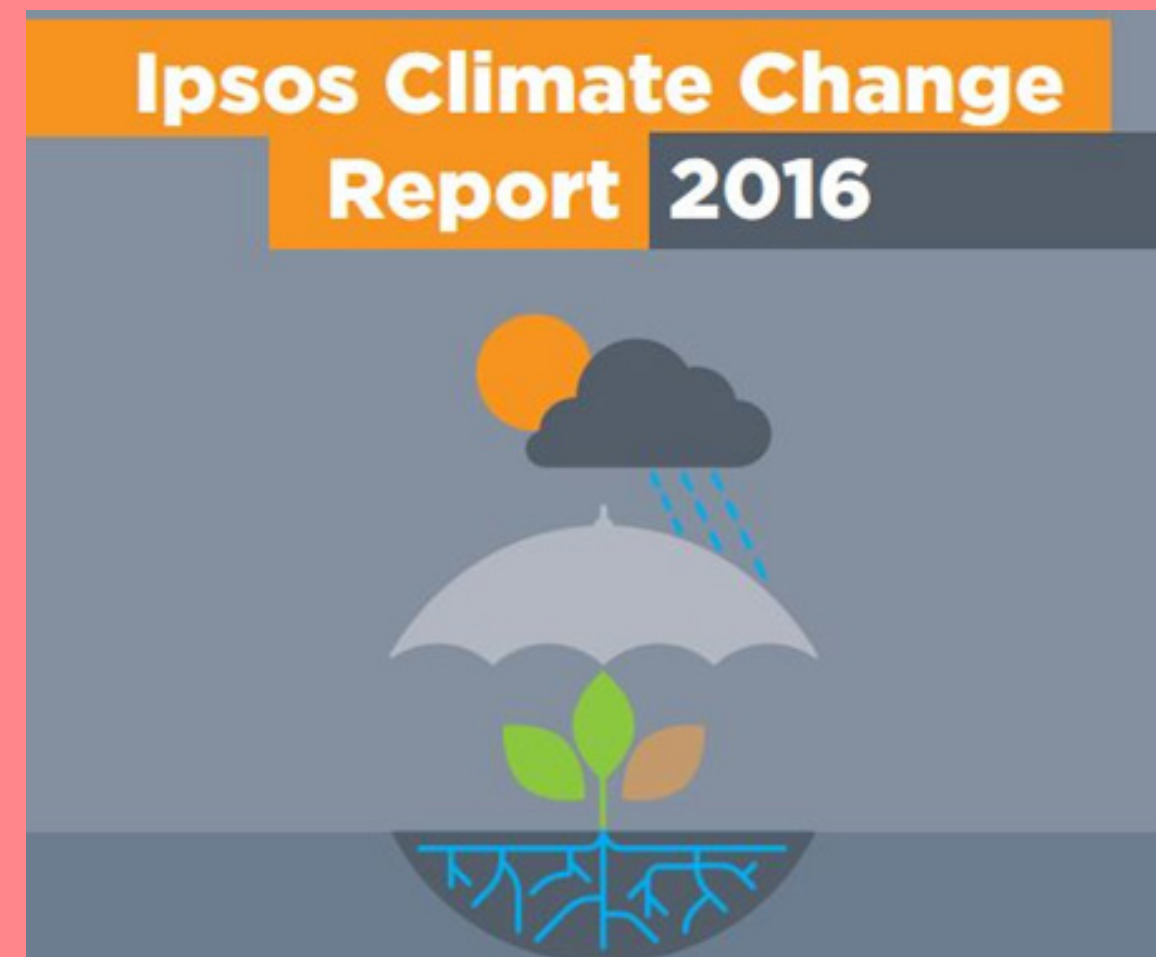
This is the tenth consecutive year Ipsos has asked Australians their views on environmental topics with a focus on climate change.

Since 2013, climate change has been a top priority for Australians, and in 2016 this has accelerated with more than two-in-five (43%) now believing it to be a top priority for action.

Key facts and figures:

- 42% believe that human activity is 'mainly or entirely' responsible for climate change, while 39% believe that climate change is 'partly caused by natural processes and partly caused by human activity'
- 67% agree that climate change poses a serious threat to our way of life over the next 100 years
- 59% said that Australia should be doing more to address climate change

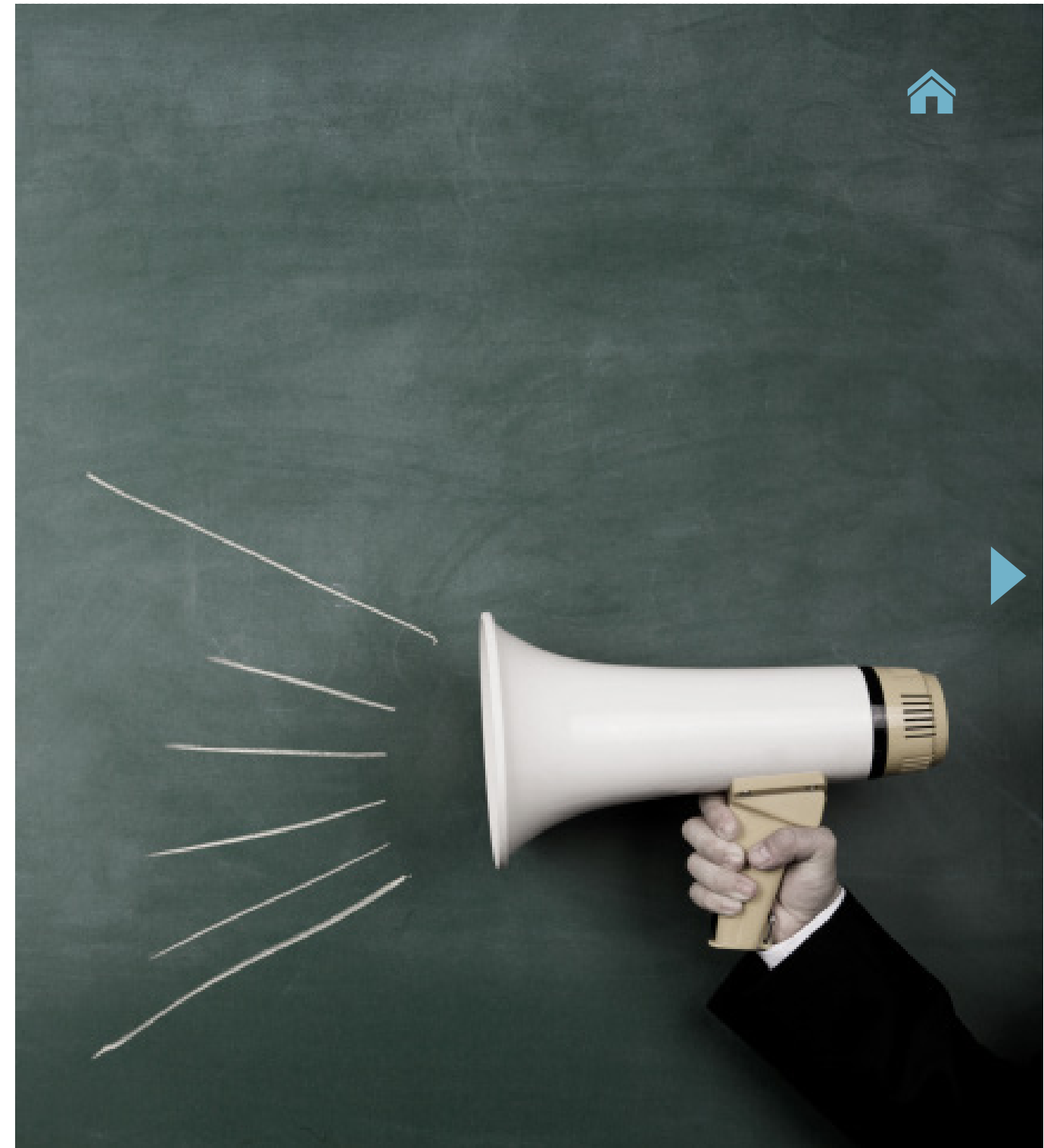
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OPINION



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Making an experience real

As more Virtual Reality (VR) content is produced, Neil Stevenson has been pondering a simple question: What makes 'good' VR content good, exactly?

[Read more ...](#)

Carers and GP Services – What does the GP Patient Survey say?

Leanora Volpe blogs on what insights the GP Patient Survey provides into the experiences of people who care or provide support for someone due to physical or mental disability or ill health, in relation to general practice.

[Read more ...](#)

Hooray. The client 'worm' is finally turning

We are now deploying a new generation of multi-sensor tracking devices for our Out-of-Home Audience Measurement contract with Route.

[Read more ...](#)

CONTACT US



For more details on any of the studies featured here, please contact your usual account representative or alternatively get in touch with

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All methodological details are available via the website links



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