

# Ipsos MORI Highlights

## November 2016

- Half say the government is doing a bad job at handling Britain's exit from the EU: but are positive about government's handling of the economy
- Majority across 25 countries say their country is on the wrong track





# WELCOME TO NOVEMBER HIGHLIGHTS

Virtually every month in 2016 has brought some surprise or other: in November President-elect Trump got 2 million fewer votes than Hillary Clinton – more or less as the polls predicted – but won the Electoral College vote narrowly in three states where the polls were too close to call.

The world now awaits to see what impact his leadership has on both the US and the global economy. As human beings love looking for patterns we can discern an anti-globalisation, anti-immigrant, 'left behind' pattern on both sides of the Atlantic (and as always it is more complicated than that). The next manifestation of popular revolt against the elites comes in the Italian referendum shortly – which our polls say the government will lose – forcing a new election and the abandonment of vital reforms in Italy, and possibly more instability in the eurozone. Our latest global poll has 61% in 25 major economies saying their country is going in the wrong direction.

All that is certain is more uncertainty.

At home in the UK, the complexities of Brexit are becoming clearer and 48% think the government is not handling it well. Yet they remain much more confident in the government's handling of the economy than the Labour party's.

Economic confidence has stayed subdued, and house price expectations are falling. We know 67% of consumers are worried about price rises to come.

Elsewhere in this issue we look at motherhood in China, how America has reacted to its election, women in the Middle East, police with tattoos, housing, advertising effectiveness, managing customer expectations and more!

We do hope you can make our light-hearted review of the year in London on the evening of 13 December with David Aaronovitch of The Times, Justine Roberts of Mumsnet and me, among others. It will be a chance to reflect on a year that is memorable in all sorts of ways, and have a much needed drink or two.

I look forward to seeing you there – as ever, all feedback appreciated.



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

# IPSOS MORI'S NOVEMBER HIGHLIGHTS



## POLITICS

- Half say the government is doing a bad job at handling Britain's exit from the EU
- Public positive about government's handling of the economy
- Immigration and NHS tied as the most important issues facing Britain



## SOCIETY

- Majority across 25 countries say their country is on the wrong track
- Public are largely comfortable with police officers having visible tattoos
- Work and wellbeing - exploring inequalities



## ECONOMY & BUSINESS

- State pension reforms: tracking changes in people's awareness and understanding
- Great expectations: are service expectations really rising?
- Ipsos Views - Black Friday: The story so far
- Business travel risks on the rise say decision-makers



## INTERNATIONAL

- Political views from North America
- She speaks: Ten things you need to know about women in MENA
- Young mothers in China



## HOUSING

- Post-Brexit dip in house price outlook
- Glasgow Household Survey 2016



## MEDIA, BRANDS & COMMUNICATIONS

- Diamonds are no longer forever
- Digital advertising: measure the metrics that matter
- Don't let promising breakthrough innovations die



## EVENTS

- End of Year Review 2016



## OPINION

- Does your brand tracking need a work out?
- Europe's changing view of Brexit
- Ditch the traditional family structure
- Applied thinking: Plunge

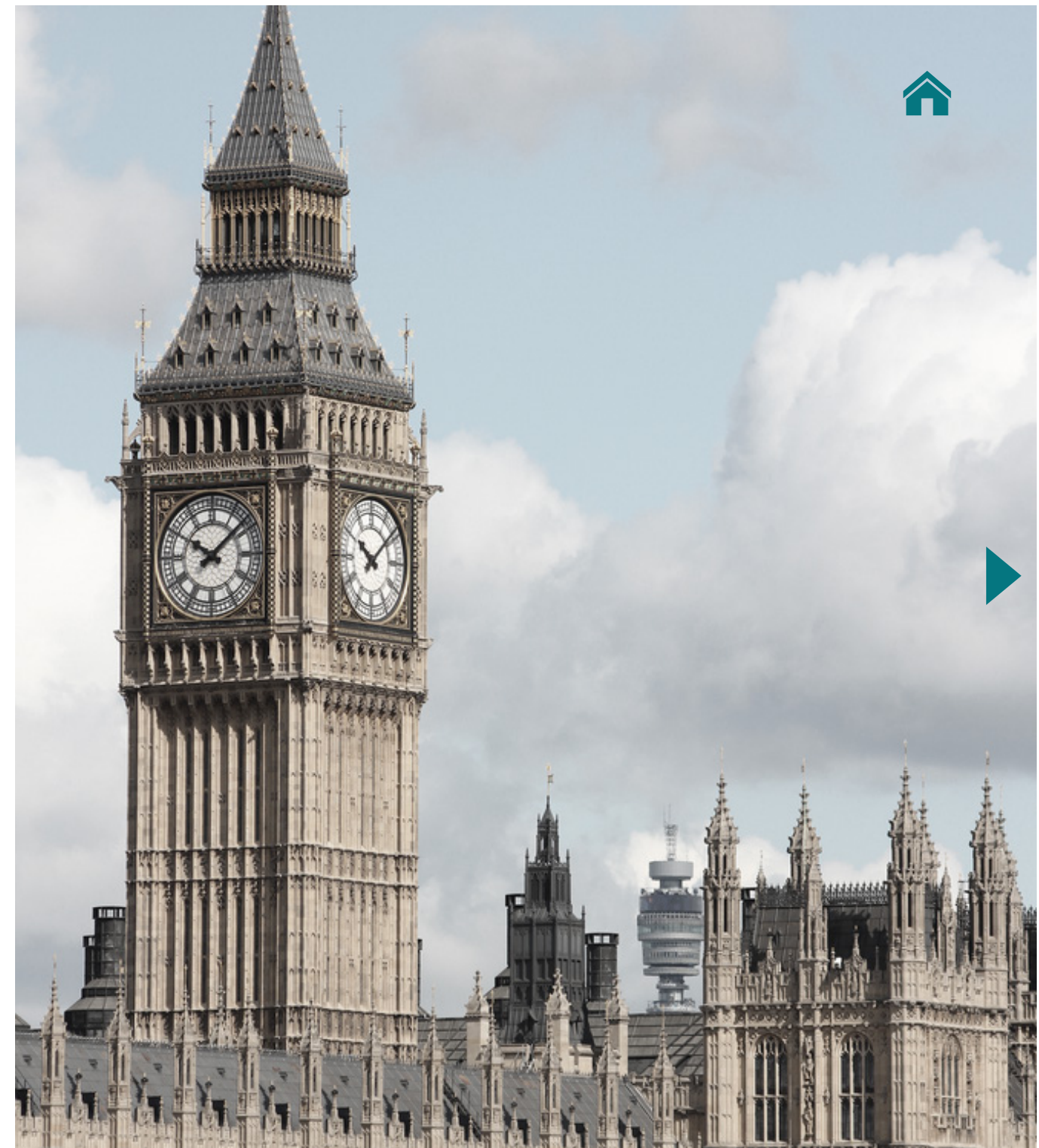


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# POLITICS



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# HALF SAY THE GOVERNMENT IS DOING A BAD JOB AT HANDLING BRITAIN'S EXIT FROM THE EU



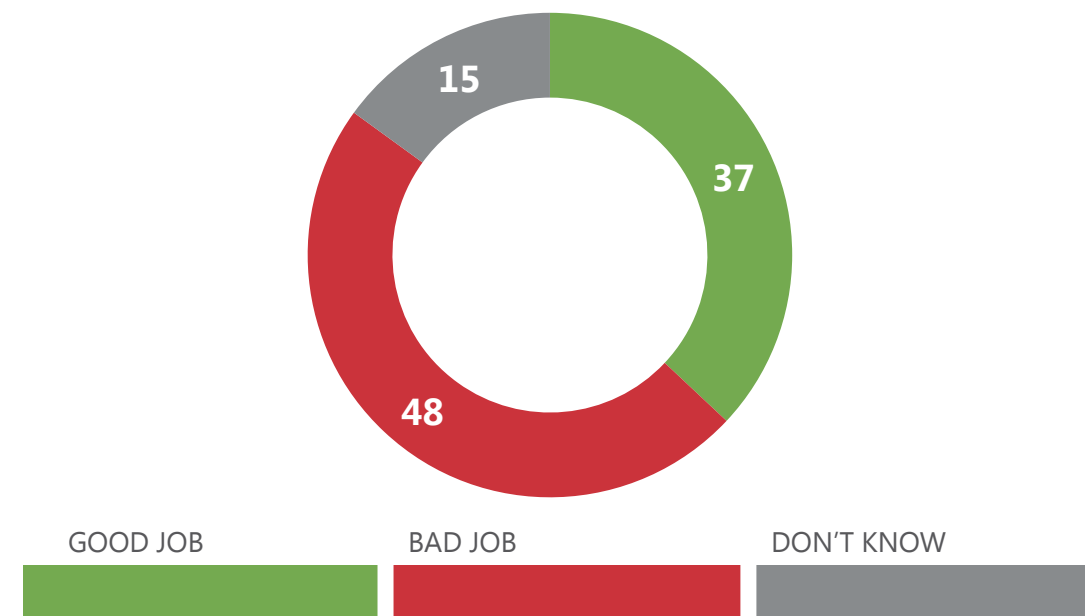
**Weeks after the High Court's decision requiring the government to receive parliamentary approval before Article 50 is triggered, the new Political Monitor reveals the public are split when it comes to what role parliament should take when initiating the start to Britain's exit from the European Union.**

Key findings include:

- Forty-four percent believe that parliament's role should be to only vote on triggering Article 50, while 37% think that parliament should have a further role telling the government what terms Britain's future relationship with the EU should be. Opinion is largely divided along those groups who either voted for Leave or Remain.
- Meanwhile, almost half of the public (48%) believe the government is doing a bad job at handling Britain's exit from the European Union, with 37% saying it is doing a good job. Again opinion is divided along familiar lines.
- It's not all gloom for the Prime Minister however as there is little sign her personal honeymoon is coming to an end. More than half (54%, up six from last month) of Britons are satisfied with her doing her job as Prime Minister while three in ten (30%) say they are dissatisfied – leaving her with a net satisfaction score of +24.

[Read more ...](#)

Since the government under Theresa May was formed in July, do you think the government has done a good job or a bad job at handling Britain's exit from the European Union?



Base: 1,013 British adults 18+, 11<sup>th</sup> – 14<sup>th</sup> November 2016

# PUBLIC POSITIVE ABOUT GOVERNMENT'S HANDLING OF THE ECONOMY



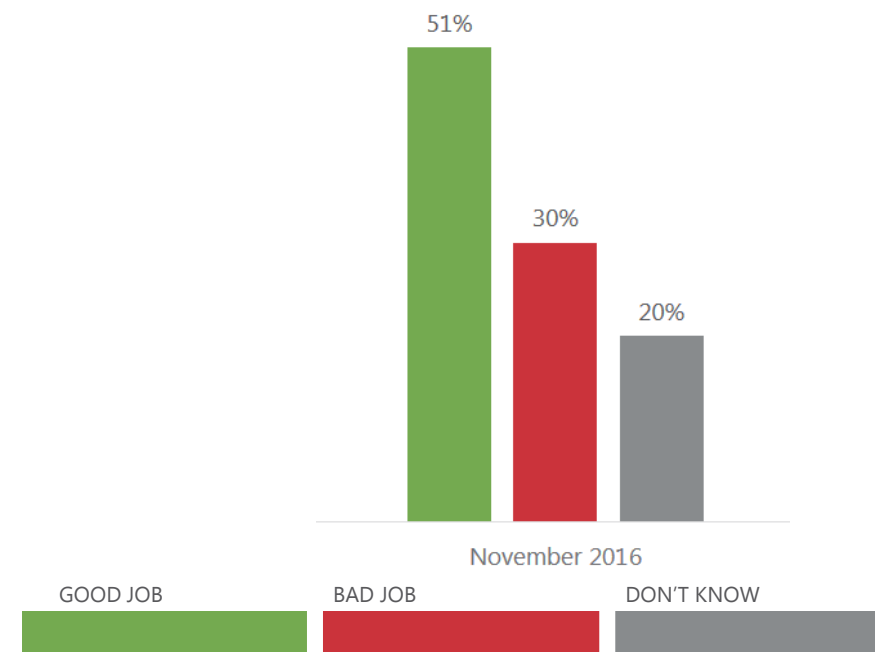
**Ipsos MORI finds the public more satisfied than dissatisfied with the Chancellor, Phillip Hammond, and the government's handling of the economy, despite many thinking the economy will worsen in the next twelve months.**

Key findings include:

- When asked about the government's overall job at handling the economy, half (51%) believe it is doing a good job while three in ten (30%) say a bad job. More believe that Theresa May's government is doing a good job handling the economy than when last asked about David Cameron's government last May, when 42% said it was doing a good job and 47% a bad job.
- This is despite many believing the economy will get worse over the next year. Just under half (47%) say the economy will get worse compared with a quarter (26%) who say it will improve – leaving a net Economic Optimism Index score of -21.
- Two in five (39%) are satisfied with the job Philip Hammond is doing as Chancellor (12 points higher than George Osborne's last satisfaction rating in March).

[Read more ...](#)

Since the government under Theresa May was formed in July, do you think the government has done a good job or a bad job at managing the economy?



Base: 1,013 British adults 18+, 11<sup>th</sup> – 14<sup>th</sup> November 2016 Previously asked as 'Since it was elected last year, do you think the government has done a good job or a bad job at managing the economy?'

# IMMIGRATION AND NHS TIED AS THE MOST IMPORTANT ISSUES FACING BRITAIN



The latest Ipsos MORI Issues Index reveals a tie between immigration and the NHS as the biggest issue facing Britain.

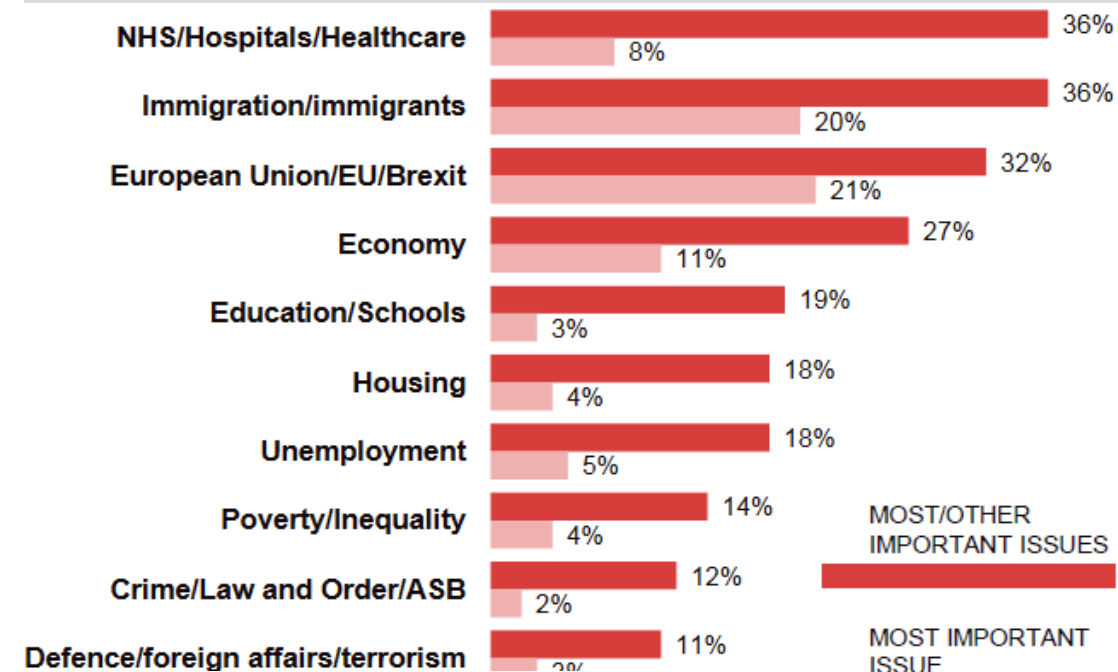
Key findings include:

- Both immigration and the NHS are seen as one of the biggest issues facing the country by 36%. However, there is a sharp difference between the two issues on the proportion of the public who see each as the single biggest concern – here 20% mention immigration, compared to just eight per cent who say it is the NHS.
- Concern about both issues has fallen slightly since September, by four percentage points for the NHS and by three percentage points for immigration. The EU and Brexit is the third biggest issue overall, mentioned by 32%, but alongside immigration tops the list of the single biggest issue facing the country, at 21%. Rural dwellers (31%) and Conservative voters (30%) were especially likely to say that the EU and Brexit is the single biggest issue facing Britain.

[Read more ...](#)

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

Top mentions %



Base: 992 British adults 18+, 30<sup>th</sup> September – 19<sup>th</sup> October 2016



# SOCIETY





# MAJORITY ACROSS 25 COUNTRIES SAY THEIR COUNTRY IS ON THE WRONG TRACK



**A majority of people in 25 countries around the world think things in their country are off on the wrong track, according to a global poll from Ipsos, 'What Worries the World'.**

## Off on the wrong track?

Overall, across the 25 countries as a whole, people are more likely to think things in their country are off on the wrong track (61%), than headed in the right direction (39%).

## What do we worry about?

In Britain, **immigration** is the number one worry, but there has been a drop of 6% points compared with last month when Britain was the country most worried about it out of all 25 included in the study.

## Do worries reflect reality?

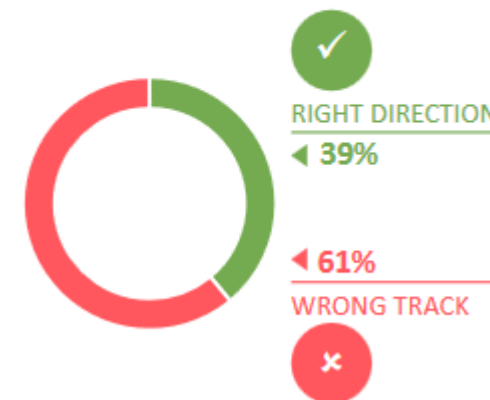
It's clear from the findings that the level of worry about key issues in different countries often bears little relationship to reality. In South Korea, for example, actual unemployment is relatively low at just 4%, but 57% of Koreans say it is a worry – around the same level as South Africa where the actual rate of employment is much higher (25%).

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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  
October 2016**



**RIGHT DIRECTION**

Oct 2016

39%

Sep 2016

38%

Aug 2016

38%

Base: Representative sample of adults ages 16-64 in 25 participating countries. c. 18,000 per month

# PUBLIC ARE LARGELY COMFORTABLE WITH POLICE OFFICERS HAVING VISIBLE TATTOOS



**New polling on behalf of the Police Federation shows that the majority of people in England and Wales say they would be comfortable in dealing with a police officer who had a visible tattoo.**

Key findings include:

- (58%) in England and Wales say they would be comfortable in dealing with a police officer who had a visible tattoo.
- And eight in ten people (81%) also say that a police officer having a visible tattoo would not affect their level of confidence in them to perform their duty.
- Six in ten (60%) think that people with visible tattoos should be allowed to join the police force (13% disagree) while one in three (34%) agree that officers with visible tattoos should have to keep them covered up when on duty (37% disagree).

[Read more ...](#)



# WORK AND WELLBEING - EXPLORING INEQUALITIES



**The Carnegie UK Trust commissioned Ipsos MORI Scotland to provide evidence on how different aspects of 'fulfilling work' are experienced by people across different demographic groups, regions and industry sectors.**

Key findings include:

Young people are more likely to be low-paid, on zero hours contracts, and dissatisfied with their sense of achievement from work.

Disabled people are both less likely to be employed, and when they are they face significant inequality. They are more likely to be low-paid, to be underemployed, to report difficulties balancing work and non-work commitments, to be dissatisfied with their sense of achievement in their work, and to score lower on measures of engagement with the organisation they work for.

While sectors that score low on one measure of 'fulfilling work' do not necessarily score low on others, those working in hotels, restaurants and related services appear disadvantaged across many of the measures considered, including income, unpredictable hours, underemployment, and work-life balance.

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# ECONOMY & BUSINESS



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# STATE PENSION REFORMS: TRACKING CHANGES IN PEOPLE'S AWARENESS AND UNDERSTANDING



**The Department for Work and Pensions commissioned Ipsos MORI to undertake survey research tracking awareness and understanding of changes to the State Pension system.**

The research explores in particular awareness of the new State Pension, understanding of the mechanics of the changes and the personal implications, and recall of DWP communications activity around these changes.

A series of tracking surveys was undertaken between July 2014 and April 2016.

The research found that awareness of changes to the State Pension had increased across all age groups, from 36% in July 2014 to 51% in April 2016.

[Read more ...](#)



# GREAT EXPECTATIONS: ARE SERVICE EXPECTATIONS REALLY RISING?



**Our latest data suggests that expectations have a role to play in understanding the link between the day-to-day of customer experience and overall brand relationships.**

In both the private and public sector, failing to properly understand customer needs leads to wasted money, time and energy. If customer satisfaction is subjective and influenced by expectations, an optimal customer experience strategy must also take expectations into account.

Some conclusions include:

- That customer service expectations are rising has become a truism. In some ways this dynamic nature of expectations is entirely intuitive.
- Technology has transformed many traditional services and facilitated entirely new services in ways that were scarcely imaginable only 20 years ago and it is likely that customer expectations have changed as a result.
- However, we should also recognise the potential for constancy in other elements of service expectations – for example in the expectation that services such as the NHS should fundamentally deliver the outcome of making us better when we are sick.

[Read more ...](#)





# IPSOS VIEWS - BLACK FRIDAY: THE STORY SO FAR



**Tim Denison of Ipsos Retail Performance takes us on a tour of the history of Black Friday, identifies some successes (and failures) along the way, and offers some thoughts as to what the next few years might bring.**

From humble beginnings in Philadelphia some 50 years ago, "Black Friday" has become a global retail phenomenon thanks largely to the internet and the media. Today's sales extravaganza was originally conceived as a one-day bargain bonanza in shops, to be held on the day after Thanksgiving Day in America, designed to kick-start the Christmas shopping season.

Every year there are new lessons to be learnt from Black Friday. Getting it wrong can have serious consequences for a retailer, given its size and its profile with the media. We've included our top five steps to a successful campaign.

Black Friday has become a global retail phenomenon in less than 10 years. In most markets sales continue to grow year-on-year on the day as its reputation with consumers and its participation among retailers both become stronger.

Yet, the story is very different in its country of origin, the United States. We suggest a number of good reasons as to why Black Friday is losing its relevance in its original home.

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# BUSINESS TRAVEL RISKS ON THE RISE SAY DECISION-MAKERS



**In October 2016 Ipsos MORI surveyed people who organise, influence, or are responsible for, their organisation's travel and risk mitigation policies, on behalf of International SOS.**

Key findings include:

- The findings suggest business travellers are nervous about international travel risks. Almost three quarters (72%) of participants surveyed towards the end of 2016 feel that risks to business travellers have increased, with over half (57%) expecting further increases in risk over the next year.
- Against this backdrop, 48% say that their organisation's investment in risk management has increased over the past year, with 47% expecting further increases over the coming year.
- Perhaps unsurprisingly, the vast majority of organisations (80%) say their business has modified travel itineraries due to health or travel security concerns over the past year. The most common reasons for modifying travel itineraries were: terrorism (51%), country risk ratings (36%), and civil unrest (31%).

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# INTERNATIONAL



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# POLITICAL VIEWS FROM NORTH AMERICA



**The latest Reuters/Ipsos Core Political has been released following the presidential election of Donald Trump.**

**Direction Trends:** Since the election, Democrats and Republicans are equally cynical about the direction of the country, with nearly two-thirds saying that the country is headed in the wrong direction (61% for Democrats and 68% for Republicans). This represents a shift from pre-election numbers, which saw 43% of Democrats and 86% of Republicans believing the country was headed in the wrong direction.

The economy moves back into the top slot as the most serious problem facing the United States, with just over one-fifth of Americans citing each as a top threat. Terrorism is only cited by 13% as the most serious problem.

**Approval:** Both Mike Pence and Donald Trump are enjoying higher favourability since the election with over half (56%) favourable towards the Vice President-Elect and almost half (48%) currently favourable towards President-Elect Donald Trump.

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# SHE SPEAKS: TEN THINGS YOU NEED TO KNOW ABOUT WOMEN IN MENA



**This multi-country survey seeks to understand the attitudes, aspirations, lifestyles and interests of women in the Middle East and North Africa (MENA).**

Women are the main influencers when it comes to purchase decisions relating to the household, and that influence extends across categories.

Here are five findings from the report:

1. Women rely on “traditional” media rather than the internet for most news on products or brands
2. Only 14% have bought products online
3. Social media is very popular, with 86% of internet users using one platform or another, with the most used being YouTube
4. 40% of women always buy things they didn’t originally plan on buying
5. Exactly half of the women surveyed say they show loyalty by sticking to the brands they know

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# YOUNG MOTHERS IN CHINA



**Marketing to the new generation of mothers in China: a key target for many FMCG and maternal-child brands.**

There is a new generation of mothers in China, mainly comprising those born after 1985, who have grown up in the era of the internet.

How do these groups use the media? What are their considerations when making purchase decisions? And how should a brand respond to these habits?

Among the findings of this report from Ipsos in China:

- 38% of young parents plan to exchange their house or buy a new one
- 47% want to replace their car
- 22% of new mothers used their smartphone to access the internet more *since birth* than before being pregnant

[Read more ...](#)





# HOUSING



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# POST-BREXIT DIP IN HOUSE PRICE OUTLOOK



**The latest Halifax Market Confidence Tracker research by Ipsos MORI shows a 14 point fall in the Halifax House Price Outlook, down from +56 in March to +42.**

This is the lowest the measure has been since June 2013, continuing a declining trend following a high point in Spring 2015.

This figure is driven by a 6 point increase in expectations of a fall in the average UK house price in 12 months' time (up from 9% in April) and a 8 point decrease in expectations of a higher average (down from 65% in April). At the same time, the proportion saying they 'don't know' has almost halved; now at 7% from 13% in the Spring.

Buying sentiment has dropped slightly by 1 point from +18 in April while selling sentiment is now at its lowest since September 2013 with a fall from +31 to +9.

The EU referendum has had little impact on the behaviour of buyers and sellers; 15% of those who were buying or selling a house before the referendum say that it has changed their minds leading them to cancel or postpone plans.

[Read more ...](#)





# GLASGOW HOUSEHOLD SURVEY 2016



## Results of the 2016 wave of the Glasgow Household Survey, conducted for Glasgow City Council

Key findings include:

- The majority of respondents (96%) were satisfied with Glasgow as a place to live, including 48% who were very satisfied
- Seven in ten were satisfied with services provided by the Council Family Group, stable on previous years of the survey
- Around two in five (42%) respondents said they were living comfortably on their present income and a similar proportion (43%) said they were coping. Thirteen per cent said they were finding it difficult to cope
- Approaching two thirds (64%) of respondents believed that Glasgow should do everything it could to get rid of all kinds of prejudice, while 20% believed that sometimes there was good reason for people being prejudiced against certain groups

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# MEDIA BRANDS & COMMUNIATIONS



# DIAMONDS ARE NO LONGER FOREVER

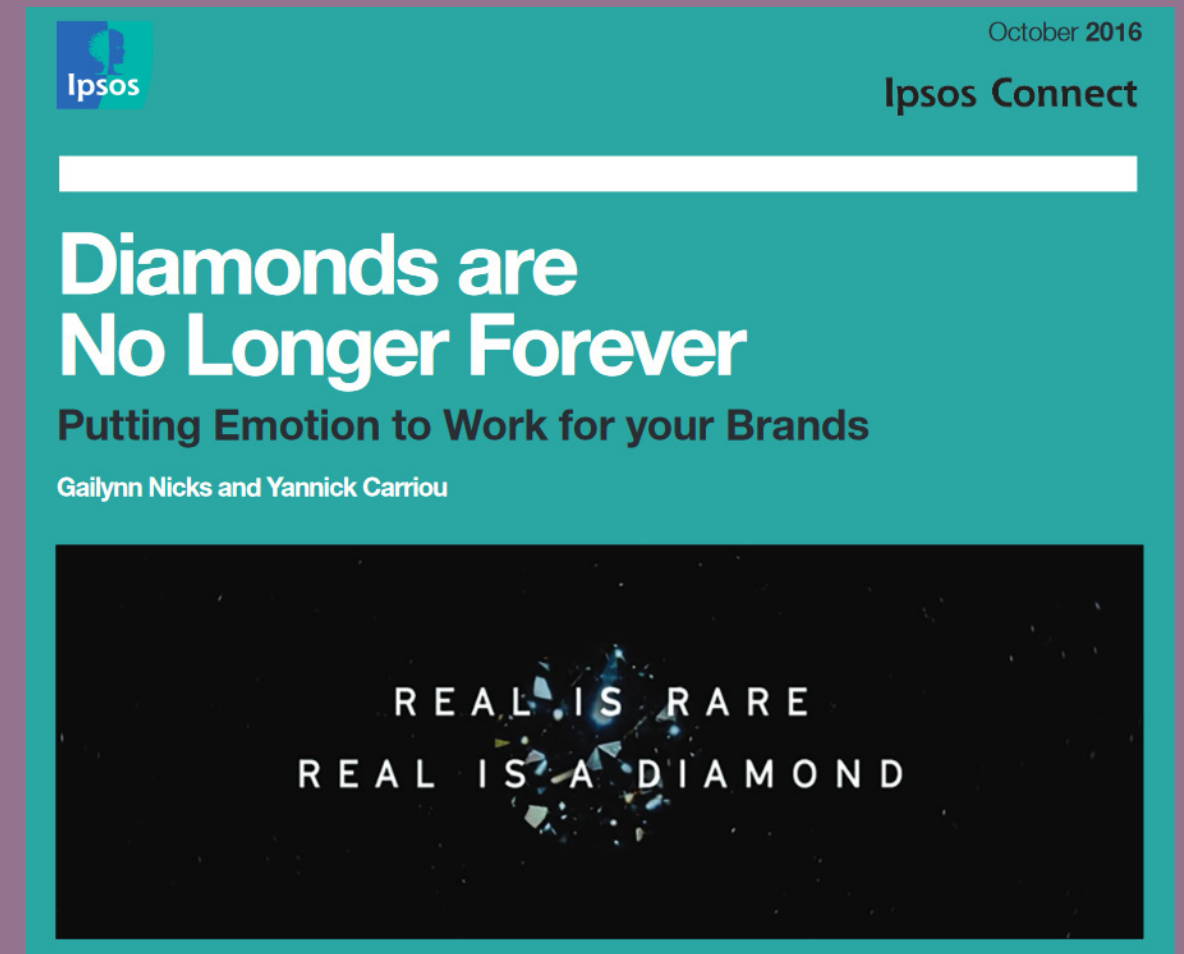


**Yannick Carriou and Gailynn Nicks look at how The Diamond Producers Association harness the power of emotions for their newest advertising campaign targeting millennials.**

Key findings include:

- Brands need to have a range of distinctive iconography or assets that are consistent, engaging and understood so that they reinforce the stories and emotional stimuli in advertising.
- Ensure that emotion-based advertising links the brand through association with the cues – needs, functions, situations, sounds, sights or smells – that are most relevant in the key moments.
- Effective use of emotion means having stories that are relevant to people's motivations and goals, so that they associate the brand with the things that matter most to them.

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# DIGITAL ADVERTISING: MEASURE THE METRICS THAT MATTER



**Finding the right metrics in a world with an almost infinite supply of data can be tricky. In this thought piece Ipsos Connect helps you move beyond meaningless metrics – to figure out the true long term effectiveness of your campaign.**

Many studies have shown no link between sales and click through rate, yet according to eMarketer it is one of the top 5 ways in which advertisers and publishers evaluate native mobile ad campaigns. Marketers need to be clear on their desired brand impact and the role of communications to help achieve this. Which means determining:

- What attitudes or behaviours do you wish to influence?
- Over what timeframe?
- Which metrics demonstrate their success?

Once the goal has been set it then becomes important to choose the right tactics. The biggest challenge brands face is getting noticed. With a limitless amount of content to consume, how can you maximise the chances that your communications will gain attention?

[Read more ...](#)





# DON'T LET PROMISING BREAKTHROUGH INNOVATIONS DIE



**Breakthrough innovations are critical to the future success of your organisation. Not least as they can yield more than double the returns of other innovations.**

To introduce a breakthrough innovation effectively, marketers must recognise that the research and marketing behind the innovation will be different from a traditional product. Lee Markowitz reminds us that, before moving forward, marketers must first confirm with consumers that they really do have a breakthrough product.

Second, they need to understand the potentially wide competitive set.

Third, they need to modify their research approaches to ensure that they use the right stimulus and ask the right questions.

Finally, they have to rethink how they forecast the success of these products (taking into account the newness of the innovation along with the role played by influencers) and build their marketing plans accordingly.

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# EVENTS



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# END OF YEAR REVIEW 2016



Join us for a glass of bubbly at the Ipsos MORI End of Year Review. Our expert panel will look back on an extremely eventful year and examine the political, social and demographic trends that lie ahead.

We will also launching our latest round of Perils of Perception – Ipsos MORI’s major international study that looks at the perceptions of the public across 40 countries on key issues from levels of immigration to social attitudes and economic outlook.

## Speakers:

David Aaronovitch, Columnist at *The Times*

Justine Roberts, Founder and Chief Executive of *Mumsnet and Gransnet*

Ben Page, Chief Executive of *Ipsos MORI*

Bobby Duffy, Managing Director of *Ipsos MORI Social Research Institute*

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# OPINION



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# IPSOS MORI OPINION



## Does your brand tracking need a work out?

To measure effectiveness, you need to go beyond econometrics and focus on people, writes Caroline Walker, Managing Director, Ipsos Connect for the IPA.

[Read more ...](#)



## Europe's changing view of Brexit

The response from European leaders to the shock EU referendum result has been a mix of sadness, regret, and a desire to demonstrate that leaving the EU is no easy matter.

[Read more ...](#)



## Ditch the family structure

Marketers need to urgently reassess their views of the family unit, which has become more complex and diverse as marriage declines, divorce rates rise, people become parents later and have fewer children, writes Hanna Chalmers, Senior Qual Director, Ipsos Connect for WARC.

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## **Applied Thinking: Plunge**

At what point is it right to take the bold move and plunge into the unknown, futuristic world of virtual reality? Liz Landy, CEO - Ipsos Connect UK, writes for Campaign.

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## CONTACT US



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

### **Claire Emes**

Chief Innovation Officer

[Claire.Emes@Ipsos.com](mailto:Claire.Emes@Ipsos.com)

All methodological details are available via the website links



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