Rising concern about the NHS, and the economy

Age, not class, was the key factor in voting the General Election and the youth vote surged

Beyond Populism – our latest report examines what it is and is not...
Welcome to the latest monthly round up of Ipsos MORI’s research and publications. Who said election campaigns rarely change anything? The 2017 election campaign saw Theresa May’s ratings tumble, her majority disappear, a surge in Jeremy Corbyn’s ratings during the campaign, a 20 percentage point rise in the turnout of under 24s, and an electorate divided by age more sharply than ever before, as our post election analysis of voting behaviour confirms.

The Ipsos/GFK Exit poll for the BBC/Sky/ITV undertaken on election day was highly accurate and allegedly saw Theresa May start making plans for an alliance with the DUP within the hour of its release. For more on how Britain voted, and the overall accuracy of the pre-election polls, click here.

We have seen a rise in public concern about the NHS, education and care of the elderly following the election, with concern about terrorism up after recent attacks, and a post election rise in concern about the economy. Brexit remains on the electorate’s minds however, but is not the top issue.

Elsewhere in this issue we look at Populism across the world – what it is and what it isn’t, with a host of senior commentators. One election where Populism failed to succeed was France, as our colleagues report here.

We look at women in Africa, one of the world’s fastest growing markets, we examine teenage drinking and parents, what people think of their/their parent’s care home (despite record general anxiety about care for older people, ratings are positive).

All this and more as we explore how to make your brand stand out in the ever more cluttered Battle for Attention, and what worries the world as a whole (it is not terrorism).

Have a great summer, and let us know if there’s anything you’d like more on next month.

Ben Page
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- Sharp rises in concern about the NHS and education
- Globally unemployment remains the top issue - not terror

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Key findings include:

- Age was even more of a dividing factor than in 2015 (and the biggest we’ve seen since our records began in 1979).
- The middle classes swung to Labour, while working classes swung to the Conservatives – each party achieving record scores.
- Education represents another clear divide.
- The Conservatives fell further behind Labour among BME voters.
- The Conservatives and Labour both held on to around nine-tenths of their 2015 vote.
- Labour had a lead among 2016 Remain voters, the Conservatives had a lead among 2016 Leave voters.
- Not many people who didn’t vote in 2015 or 2016 voted in the 2017 election, but those who did mostly chose Labour.
SHARP RISES IN CONCERN ABOUT THE NHS AND EDUCATION

The final Ipsos MORI/Economist Issues Index prior to the General Election showed six in ten Britons consider the NHS to be one of the biggest issues facing Britain, up 13 percentage points from last month.

Key findings include:

• Six in ten (61%) Britons consider the NHS to be one of the biggest issues facing Britain. This is the highest level of concern recorded since April 2002, and sixteen percentage points higher than the proportion who say the same about Brexit this month (45%).

• Education is now seen as the third most important issue, on 27% - on a par with immigration (25%) and ahead of the economy (20%).

• Fieldwork was carried out between 5th and 15th May, so nearly all interviews were conducted before stories about NHS hacking appeared in the news. This also means fieldwork was conducted before the tragic events in Manchester on the 22nd May.

• Despite strong rises in broader concern about the NHS and education in the past month, the proportion who consider either to be the single biggest issue facing Britain is still behind Brexit, the single most important issue on 32%.

Read more •••
The three major worries for global citizens all remain consistent with the previous month:

- Unemployment is still the primary global worry, with the highest level of concern in Italy (67%). Germany is least worried, with only 10% picking unemployment as a worry.
- Financial/political corruption comes next, with South Africans most concerned (65%), and Swedes least (7%).
- Poverty/social inequality is the third most common worry, with particular concern in Hungary (57%) and the US with the least level of concern (17%).

What worries Britain

- Healthcare remains the single biggest concern for Britain at 44% for the fourth consecutive month, a two percentage point increase from the previous month.
The latest international edition of Ipsos Social Research Institute’s Understanding Society – Beyond Populism explores the major political and social shifts around the world.

For this special edition, we are delighted to bring together a wide range of influential voices and the latest ideas that are shaping the debate.

Our own major global survey on populist trends highlights the importance of “nativism” and a sense across a wide variety of countries that the ‘system is broken’. However, we conclude, as others do in this edition, that populism as it’s commonly discussed, is much more of a political strategy than a coherent ideology.

There are certainly common themes – but the key is to understand what lies beneath and beyond in citizens’ beliefs, rather than try to describe all global situations to one common phenomenon.

This edition features contributions from David Goodhart, Matthew Goodwin, Cas Mudde, Associate Professor at the University of Georgia, Le Monde’s journalist Gérard Courtois and Moisés Naim, Distinguished Fellow at the Carnegie Endowment.
Active engaged in wealth creation and cornerstones of the economy, family well-being and education, the women of Sub-Saharan Africa play a vital role in these key markets.

Key figures from this seven-country survey:

- 89% of African women are the decision-makers or co-decision-makers for household purchases.
- 42% have a regular job and 49% earn an independent living.
- 74% of the women interviewed say the status of women has improved in their country over the last five years.

‘The road to equality and female empowerment in Africa is long, but this is one of the major transformations taking place on the continent’, explains Florence de Bigault, Director of Ipsos in Francophone Africa.
As Brexit negotiations begin in Brussels, we revisit the viewpoint of business leaders in the UK according to the Ipsos MORI Captains of Industry survey.

The annual Ipsos MORI Captains of Industry study found that at the time of our 2016 interviews (Sep-December 2016), well before the general election and the start of negotiations, 84% of Captains interviewed agreed/strongly agreed that ‘how well the government actually handles Brexit negotiations is vital to my business’.

Although half of those interviewed (50%) disagreed that they were confident in the ability of the government to negotiate the best deal possible for UK businesses with the EU.

Captains expressed that the most important things for the UK to obtain during negotiations to leave the EU are: Movement/access of skilled labour (54%), securing free trade/single market (47%), passporting rights (16%), controlled/clarity on immigration (13%), continuing being a trading partner with Europe (9%), tariff agreement (9%)

We’ll be asking Captains’ views on this and many other issues again shortly so if you have any questions you’d like to ask this influential group of stakeholders do get in touch.
Advances in digital technology are giving rise to a ‘Digital Health’ revolution, making personal health management accessible to all at the click of a button, or a tap of the screen. For businesses, the challenge is in finding the sweet spot between privacy, accessibility and usefulness.

The Ipsos Global Reputation Centre recently undertook a massive online study of the reputation of more than 100 of the world’s largest companies to examine the factors that contribute to reputational success and resilience in the face of crisis.

In this new White Paper, we unpick the characteristics of the world’s most trusted companies. Being able to combine strong business performance with a social conscience is a key component of companies in the “top tier” when it comes to trust.

Trent Ross points out that we also need to be alive to differences by country: respondents in western Europe and Australia tend to be more sceptical of companies, whereas people in emerging markets, as well as the United States, are generally more trusting.

But the research shows that, by doing the right things to manage their reputation, companies can transcend poor trust scores even in these more “sceptical” markets.
Ipsos MORI and Your Care Rating have published the 2016 Your Care Rating survey results, which continue to paint a very positive picture of life in participating residential care homes across the UK.

Key findings include:

- Extremely high scores are achieved across all aspects of care rated in the Residents’ survey and in the main, family members and friends also hold very positive views of their loved ones’ care.
- Ratings of comparable measures between the two surveys are typically lower among family and friends than among residents, but the differences are small.
- Residents and their family and friends are very positive in relation to the kind, respectful and sensitive manner of staff.
- Respondents are consistently less positive about the quality and variety of food available at mealtimes, and the amount of time staff have to talk to residents (though a majority give a positive rating overall for these attributes).
- Residents’ opinions differ from those of their family and friends on specific aspects of care, a consistent pattern since the Family and Friends’ survey started.
Parents/guardians and their teenage children filled in paired questionnaires on drinking knowledge, attitude and behaviours, and parenting approaches on the issue of underage drinking.

Key findings include:

• Only 50% of young people who have had a chat with their parents about alcohol found the conversation helpful.

• 65% of children who drink alcohol, at least some of the time, do it to fit in, or to be liked, or to avoid being left out.

• 25% of parents/guardians incorrectly believe their child had their first drink at a later age than they actually did.
MEDIA
BRANDS &
COMMUNICATIONS
Today algorithms are ubiquitous. They determine what advertising we see online, whether banks will lend to us, or whether we will be picked for an interview by an employer. In the realm of audience measurement, algorithms are used to help address some of the limitations of pure survey-based research. Ultimately, they help marketers to more accurately assess the reach of their advertising messages.

All marketers want to know how best to reach their most promising prospects. But participants in surveys cannot be expected to tell us everything we want to know with perfect recall. As a result, we have developed a number of statistical techniques to help us get more value from our surveys. These range from simple survey weighting to ensure all parts of the population are properly represented, reach and frequency modelling to project audiences into the future and fusion and ascription to join disparate survey data together into an integrated view.

This paper explores some of those techniques.

The Age of the Algorithm

Andrew Green and Mario Paic

It is hard to find a major audience measurement service that does not employ statistical wizardry of one sort or another.
Globalisation has resulted in multiplying brands. And with digitisation, more content is developed for more channels. New outlets open every day through smartphones, connected screens and the Internet of Things. People are bombarded with thousands of branded messages every day, and pay less and less attention. They skip, fast forward, and multitask.

To succeed, brand communications must reinvent themselves to even get a chance to earn people’s attention. They need to rock. Literally.

Read more about the lessons Ipsos has learned from investigating successful (and not so successful) brand communications.

Remember: great campaigns are not only remembered for the idea or story they tell, but also by the brand they serve.

In real life, who has time for two steps when you can do it in one? It has never been tougher for brands to touch and move people. We all experience it.
The recent French elections saw the Ipsos and Sopra Steria teams announcing their very precise estimations ‘live’ via their media partners.

The central challenge for the first round (23 April) centred on four candidates each having a plausible chance of moving into round two.

The results released by Ipsos were extremely close to the official figures. The election saw Emmanuel Macron out in front on 24% of the national vote, with Marine Le Pen’s Front National recording 21.3%, a record for her party.

The second round, on 7 May, saw Macron elected as France’s youngest president (Ipsos’ final estimations were 65.8% to 34.2% compared with the result: 66.1% vs 33.9%).

The abstention rate was higher in the second round (25.4% vs 22.2% in the first). Additionally, a record number of 4.1 million blank and null votes was recorded (8.6%).
The latest views of people in the EU on their transport infrastructure in ten major European Union countries looking at transport infrastructure.

Some key figures from the survey:

- On average, Europeans spend almost two hours per day on the move, irrespective of the mode of transport.
- The car is the most common mode of transport for regular daily journeys (65% drive to their place of work or study).
- 66% of Europeans would be prepared to use their car less if “necessary investments” were made.
- 77% believe that mobility innovations in the future will have a positive impact on their day-to-day life.

As for the future, nearly half (46%) of people surveyed agree that self-driving vehicles would be driving on “almost all roads” in 15 years’ time.
Europeans, Americans and Brazilians are going for shorter holidays more often

With the holiday season now starting in many parts of the world, Ipsos has released its latest Europ Assistance holiday barometer.

A reduced holiday budget for holidaymakers is in evidence on both sides of the Atlantic.

Domestic holidays are still preferred by many. More than 50% of holidaymakers from France, Italy and Spain will stay in their own country, while 41% of Americans and 34% of Brazilians stay ‘local’.

Of the cities that Europeans would like to visit, New York comes out on top, while Americans and Brazilians favour Paris.

Although the majority of holidaymakers prefer a hotel, other options are now attracting large numbers, especially in the US. There, 48% of people have participated in ‘primitive camping’, compared to 23% of Europeans.
This month sees 45% of global citizens assessing the current economic situation in their countries as “good”. This is the highest score ever recorded in the Global Economic Pulse.

The main driver of this is Latin America where Peru now has 77% describing their country’s economic situation as “good”. Mexico and Argentina are also showing improvements.

Globally, Saudi Arabia takes the top spot, with 87% saying the economy in their country is in “good“ shape. The mood is also positive in India (83%), with China and Germany both at 81%.

At the other end of the spectrum is Brazil (where just 10% give their economy a positive rating), followed by South Korea and South Africa (both 13%).

But what of the next six months? In India, as many as 70% expect to see the economy in their local area become stronger over the next six months.

The positive trend continues, with people increasingly upbeat about the state of the economy in their part of the world.
EVENTS
The world of innovation is phenomenally challenging. Savvy, connected consumers seek the Next Big Thing and focus on personalisation and experience beyond the product/service, whilst researchers must navigate more complex markets, blurring categories, shrinking research budgets and competitors who weren’t even conceived a decade ago. Yet, smart and agile approaches to innovation can provide a route through these challenges.

We would like to invite you to our event at which you will hear from peers who have risen to the innovation challenge with great success:

Speakers:

- **Dawn Farren**, Global CMI Director, Unilever & Billie Ing, Innovation Engagement Lead, Ipsos
- **Katell Maguet**, Consumer Insights Manager from International Flavors & Fragrances (IFF)
- **Emma Dutton**, Managing Director, Applied Influence Group

Join us at this ‘Future of Research Series’ event on the 4 July, where we will explore innovation through a new, collective and consumer-centric lens.
Join Ipsos MORI and Canning House at an event on the evening of 3rd July to explore Socio-Political and Economic Trends in Latin America.

This is a joint event between Canning House and Ipsos MORI and will be hosted by Eversheds Sutherland. It will aim to highlight the socio-political and economic trends in Latin America, and discuss the risks associated with exposure to Latin American markets.

The event will begin with a presentation by Alfredo Torres, Executive President of Ipsos, Peru, followed by a panel discussion with Jonathan Glennie, Director of Sustainable Development at Ipsos MORI, Professor Julia Buxton, Comparative Politics at the School of Public Policy, Central European University, and Mark Keller, Analyst at the Economist Intelligence Unit.

We will draw on learnings from Ipsos Global Trends study, the largest study of its kind, providing a unique snapshot on Latin America today.

Monday 3rd July – 18.00
RSVP: events@canninghouse.org
Suzanne Hall looks at our General Election focus groups conducted for the BBC and identifies some trends which help unpick the shock election result.

Jonathan Gingold discusses what the gambling industry can learn from a Meerkat.
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