

Ipsos MORI Highlights

July 2017

NHS and Brexit remain the biggest issues facing the country according to the public

Britons remain split on prioritising single market access or immigration control - but there has been a move towards single market access

Theresa May's leadership ratings fall further after the General Election as Jeremy Corbyn's continue to improve

There is growing pessimism among the public about the health of Britain's economy, and falling expectations of opportunity for young people



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WELCOME TO JULY HIGHLIGHTS

Welcome to our July highlights - Britain continues to muddle through. Consumer confidence is falling, as are Theresa May's ratings, with the Labour and the Conservatives neck and neck after the Tories' disastrous election campaign which saw a bigger swing against the government than in any previous election. The only crumb of comfort for the Conservatives is that Mrs May still leads on being the "best Prime Minister" by 6 points compared to Mr Corbyn.

On Brexit, views are shifting in favour of a softer exit that gives access to the EU single market, but remain very divided – 49% now favour keeping single market access, but 41% say control of immigration is key – it will be hard for any one to reconcile these two views, and those worried about immigration are still more firm in their views.

Overall Britons might take some cheer from our latest global survey on country reputations, with the UK still seen as a force for good by 57% globally, with the US slumping to only 40% (half what its neighbour Canada now achieves).

On the other hand, our study for the Sutton Trust has the highest ever proportion saying young people's prospects are worse than for their generation, up markedly since 2003, and a falling proportion say everyone has equal opportunities (40%, down from 53% a decade ago).

As the UK announces an end to petrol and diesel cars from 2040, we find the public want to be able to fully charge electric cars in one hour, and three quarters want to be able to charge cars at home – these are

obstacles to overcome to drive adoption, with major infrastructure implications.

In the world of brands and advertising we find similar challenges this month - 42% claim to distrust brands and 69% distrust advertising. People don't perceive their own lives to be represented in advertising, particularly life outside London.

Elsewhere we look at the most popular cities in the world – London wins in Europe, but New York is most popular globally. Older people fancy Zurich to live in, for the young it's LA!!

All this, plus the norovirus, fin tech in banking, the latest on the housing crisis, a look at Latin America and much much more. As ever, let me know what you think!



Chief Executive, Ipsos MORI

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IPSOS MORI'S JULY HIGHLIGHTS



POLITICS

- NHS and Brexit remain the biggest issues facing the country
- Britons split on single market access vs immigration control but move to single market
- Theresa May's leadership satisfaction ratings fall further after the General Election
- Britain remains a positive global influence post-Brexit



ECONOMY & BUSINESS

- Growing pessimism among the public about the health of Britain's economy
- Why financial firms must forge connections in a virtual world
- Speed and availability of charging biggest barriers to electric car adoption by 2040



SOCIETY

- Ipsos Top Cities 2017
- Opportunities for social mobility are in decline
- Over a third of consumers believe social purpose should come before profit
- Public views of policing in England and Wales in 2016/17



HEALTH

- Food handlers and norovirus transmission: social science insights



MEDIA, BRANDS & COMMUNICATIONS

- When trust falls down
- Optimise digital ads, maximise brand impact, minimise spend



INTERNATIONAL

- Socio-political & economic trends in Latin America



HOUSING

- Public: housing in crisis but Government can do something



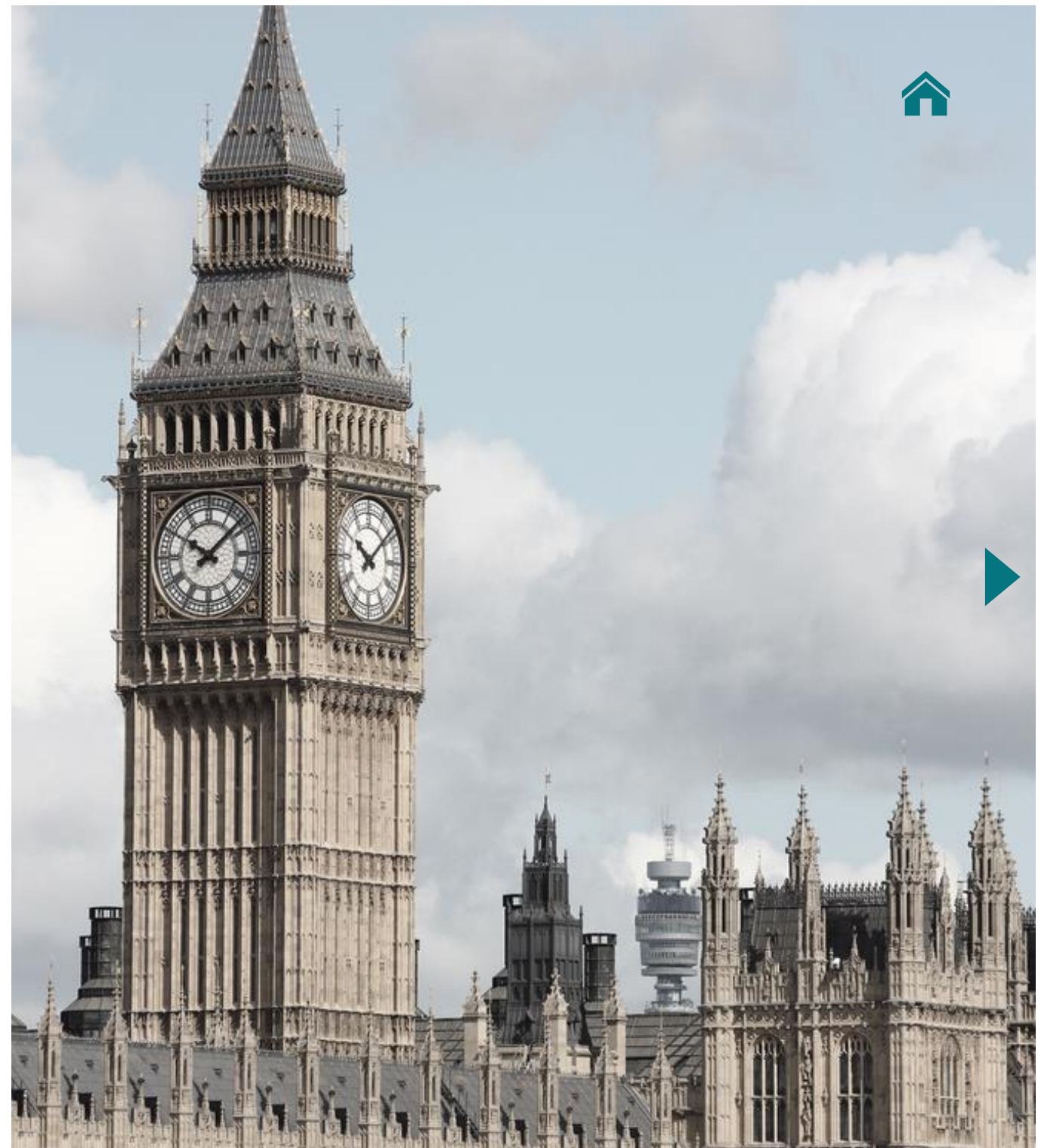
OPINION

- Will Grenfell shift public opinion about housing?
- Does Shakespeare still shock?
- Using positive psychology to build employee engagement
- We need to talk about Norm!
- Opinion polls: Why they remain the reference point

POLITICS



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NHS AND BREXIT REMAIN THE BIGGEST ISSUES FACING THE COUNTRY



Brexit and the NHS continue to head the public's list of the biggest issues facing Britain.

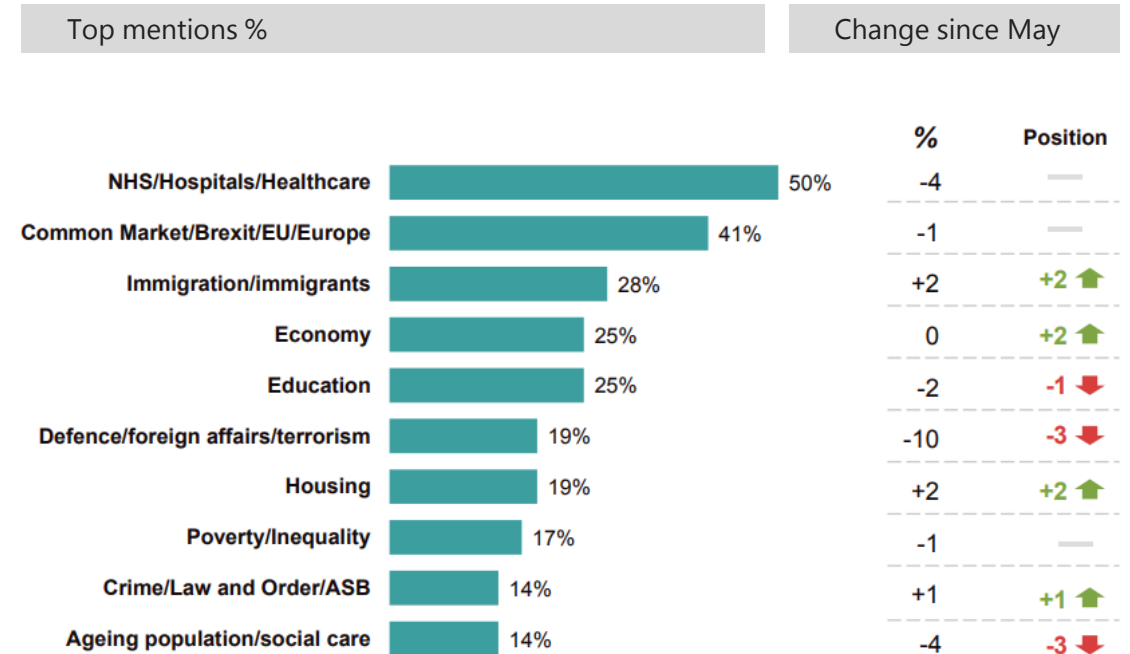
- Concern about the NHS falls this month, but still higher than any point since July 2002
- Immigration, education and the economy make up the rest of the top five

The July Ipsos MORI/Economist Issues Index finds that Brexit and the NHS continue to head the public's list of the biggest issues facing Britain, despite recent drops in the proportion naming either. Currently, half (50%) see the NHS as a concern – down eleven percentage points since May, but still the highest level for fifteen years. Similarly, 41% consider Brexit to be a big issue; ten percentage points lower than in March this year but still an historically high score.

Behind the NHS and Brexit, the British public have a similar level of concern about three other issues. Around one quarter name immigration (28%), the economy and education (both 25%) as a worry, close to the scores recorded in June for all three.

[Read more ...](#)

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



Base: c1,0012 British adults 18+, 30 June – 10 July 2017

BRITONS SPLIT ON SINGLE MARKET ACCESS VS IMMIGRATION CONTROL BUT MOVE TO SINGLE MARKET



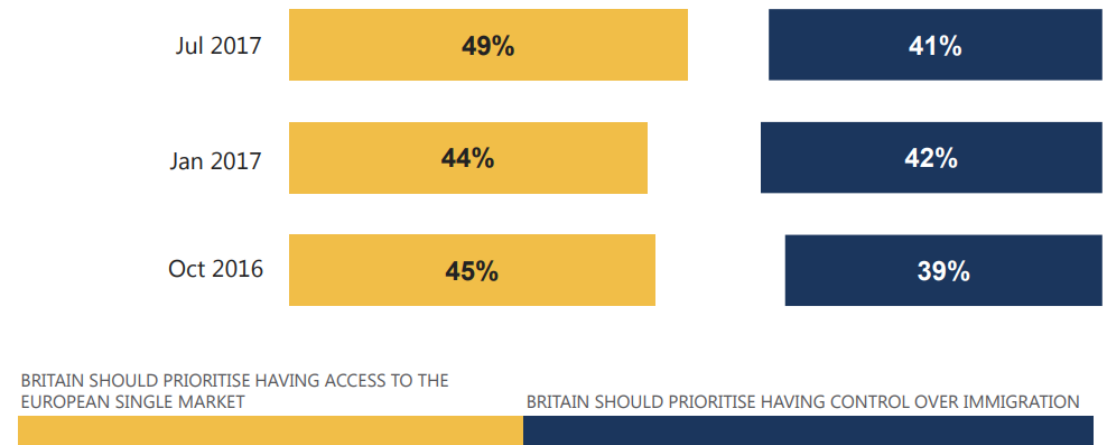
Britons remain split on prioritising single market access or immigration control – both are seen as important, but there has been a move towards single market.

Key findings include:

- There is also a fall in optimism that Mrs May will get a good deal for Britain from the Brexit negotiations. One in three (36%) say they're confident that she'll get a good deal while three in five (60%) are not confident. This is worse for the Prime Minister than in March when 44% were confident in her and half (51%) were not.
- When asked about some of the various aims that Britain should try to achieve in its negotiations on withdrawal from the European Union, full control over immigration comes out on top with the highest proportion of people (63%) saying it is essential or very important to achieve.
- Just under half (45%) say remaining in the single market is essential or very important, as do 46% for making no further contributions to the EU budget after it leaves, while two in five (39%) say a transition period after Britain has left the EU is essential or very important.

[Read more ...](#)

Should Britain prioritise single market access or control of immigration in its future relationship with the EU?



Base: c1,000 British adults each month

THERESA MAY'S LEADERSHIP SATISFACTION RATINGS FALL FURTHER AFTER THE GENERAL ELECTION



Theresa May's leadership satisfaction ratings falling further after the General Election as Jeremy Corbyn's continue to improve.

One month on from the General Election Ipsos MORI's new Political Monitor reveals the negative shift in Theresa May's personal ratings continues. Her ratings are the worst in our records for a Prime Minister one month after an election.

One in three (34%) Britons say they are satisfied with Theresa May's performance as Prime Minister. This is down 9 points from last month (one week prior to election day) and down 22 points from April when she called the election.

Three in five (59%) are dissatisfied with her (up 9 points from last month) leaving her a net satisfaction score of -25 – the worst score Ipsos MORI has ever recorded for a Prime Minister the month following a national election.

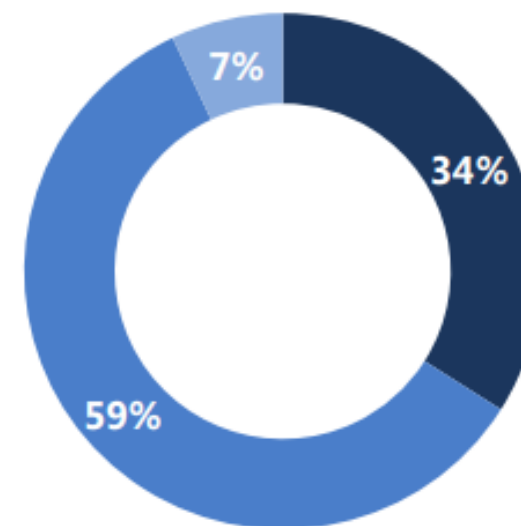
Jeremy Corbyn meanwhile has seen improvement in his ratings with 44% satisfied with him doing his job (up 5 points from June) and 45% dissatisfied (down 5 points) leaving him with a net satisfaction score of -1.

Jeremy Corbyn is now more popular amongst his own party supporters than Theresa May is with hers.

[Read more ...](#)

Are you satisfied or dissatisfied with the way Theresa May is doing her job as Prime Minister?

Top mentions %



SATISFIED	34%
DISSATISFIED	59%
DON'T KNOW	7%
Net = -25	

Base: 1,071 British adults 18+, 14th – 18th July 2017

CONCERN OVER DEFENCE/TERRORISM RISES TO THE HIGHEST LEVEL SINCE 2015



Post-election, and in the aftermath of recent terror attacks, concern about defence/terrorism is seen as the third biggest concern among Britons in the June 2017 Issues Index.

- NHS and Brexit remain the biggest issues facing the country
- Concern about education remains at the highest level for a decade
- Worries about social care and the economy both rise following the election
- Highest recorded level of concern over social care since 2011

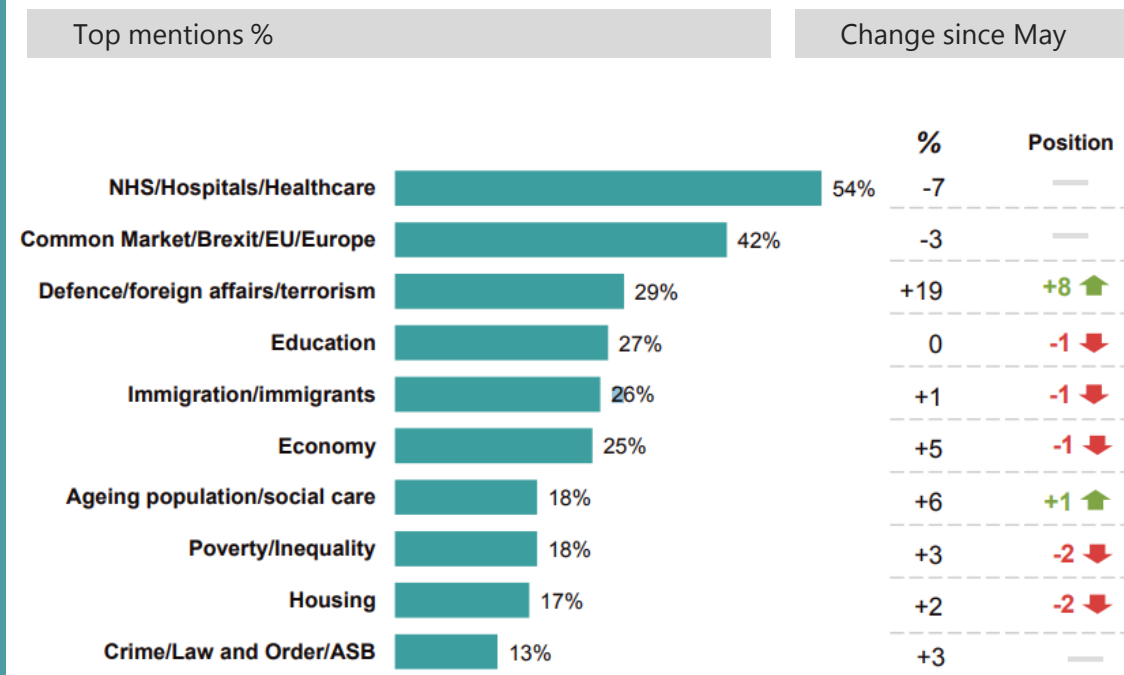
Over half (54%) of the British public see the NHS as one of the biggest issues facing Britain – this is seven percentage points lower than last month, but still the highest recorded score since June 2002. Brexit remains the second biggest issue, mentioned by 42% of the public.

At 27%, the proportion who consider education to be one of the biggest issues facing the country remains at the highest recorded level since September 2006.

The NHS is an important issue for most demographic groups; it is considered an issue by 60% of those from social grades AB, 57% of C1s, 61% of Labour party supporters and half (46%) of Conservative supporters.

[Read more ...](#)

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



Base: 965 British adults 18+, 9th – 20th June 2017

BRITAIN REMAINS A POSITIVE GLOBAL INFLUENCE POST-BREXIT



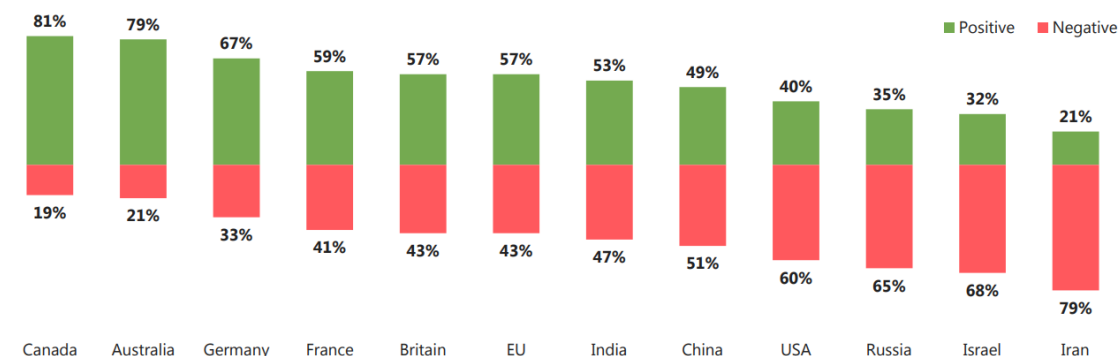
New global Ipsos MORI survey finds that more than half (57%) think Britain's influence on world affairs is positive.

Key findings include:

- 57% of the global public think Britain's influence on world affairs is positive. This is a higher score than the US (40%) and China (49%), but lower than Germany (67%), Australia (79%) and Canada (81%). The global view sees Britain's influence to be similarly positive to that of the EU (57%) and France (59%).
- However, **EU countries are less positive (48%) about Britain than the Global community (57%)**. In some EU countries (Spain, Germany and Belgium) fewer than half of citizens see Britain's influence as positive. Just 29% of Spanish citizens, and 35% of those in Germany and Belgium, say Britain's current influence on world affairs is positive.
- **Two thirds (66%) of Britons believe their own country is a positive influence on world affairs**. The British public rate only Canada (87%) and Australia (84%) above themselves. 48% believe the EU has a positive influence on world affairs, whilst 52% believe its influence is negative.

[Read more ...](#)

Thinking about right now, would you say the following countries or organisations are having an overall positive or a negative influence on world affairs?



Base: 18,055 adults aged 16-64 (18-64 in US, CA) across 25 countries. Fieldwork April-May 2017.

ECONOMY & BUSINESS



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GROWING PESSIMISM AMONG THE PUBLIC ABOUT THE HEALTH OF BRITAIN'S ECONOMY



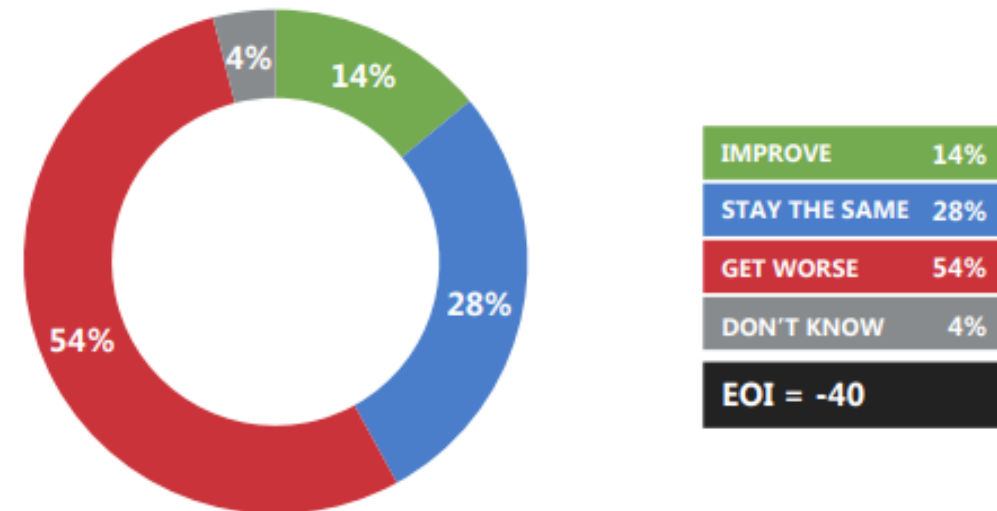
There is growing pessimism among the public about the health of Britain's economy. Ipsos MORI Economic Optimism Index falls to its lowest level since 2011.

- A majority of Britons (54%) believe that the country's economy will get worse over the next 12 months, according to the latest Ipsos MORI Political Monitor, up 11 points from when last asked in May.
- Fourteen percent think the economy will improve (down 13 points) and 28% think it will stay the same (up 5 points).
- This leaves this month's Ipsos MORI Economic Optimism Index score at -40 (down 24 points).
- Younger people are more pessimistic about the economy than older people.
- There are also notable party differences when it comes to economic optimism. Three quarters of Labour and Liberal Democrat supporters believe the economy will get worse (73% and 75% respectively) over the next 12 months, compared with three in ten (31%) Conservatives.

[Read more ...](#)

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?

July 2017



Base: 1,071 British adults 18+, 14th – 18th July 2017

WHY FINANCIAL FIRMS MUST FORGE CONNECTIONS IN A VIRTUAL WORLD



Can financial services companies build connections in a world of increasingly virtual relationships? They need to if they want to keep and gain customers, writes Tony Smith in Quirk's.

Anyone who's used a dating app will tell you that virtual dating isn't the same thing as meeting someone in person. Sure, you can build an emotional bond of some sort but if that online connection doesn't translate into the real world, the relationship is over before it begins. Anyone who's used a dating app will also tell you that apps have forever altered the experience of dating.

In the same way, the world of banking and financial services has changed dramatically in recent years. There was a time, not long ago, when interactions with a bank were largely face-to-face. The first disruption was call centers that gave us a convenient alternative, allowing us to do many things outside of branch hours. We could verify account balances, transfer money, pay bills or even discuss available home-financing options while still interacting with humans. We didn't even need to venture outside of the house. The next disruptions came in the form of online banking, price-comparison sites, mobile apps to manage our accounts, digital wallets, robo-advice and live chat – all services that offer convenience for consumers.

[Read more ...](#)



SPEED AND AVAILABILITY OF CHARGING BIGGEST BARRIERS TO ELECTRIC CAR ADOPTION BY 2040



Limited availability of rapid-charging stations is today the biggest barrier to the adoption of electric vehicles, according to a new study of 17,000 people from Ipsos MORI.

Two out of every three Britons (65%) would like the minimum acceptable length of time for a fast charge to be one hour or less, and 76% would like to be able to charge their vehicles at home.

While the government on Wednesday announced a plan to abandon sales of petrol and diesel-engined vehicles by 2040, today electric vehicles are still a novelty for most people.

When presented with possible reasons for purchasing an electric vehicle, by far the most important reason was low cost: 35% chose lower fuel costs as the most important reason for owning an electric vehicle, compared with 13% who chose lower emissions and other environmental benefits.

The Ipsos Automotive Navigator study also reveals that range anxiety is a real issue for many Britons: 42% are concerned that “public charging stations are not easy to find” and 39% believe electric vehicles “have a driving range that is not suitable for long distance travelling”.

[Read more ...](#)



SOCIETY



IPSOS TOP CITIES 2017



The 2017 edition of the Ipsos Top Cities Index finds that New York is the most popular city worldwide, retaining the title it claimed when the survey was first run in 2013.

- Ipsos Top Cities 2017: New York remains the best city for work, rest and play
- EU publics see London as the top city in Europe

Looking at each of the three dimensions, different cities come out on top:

New York is the most popular city to do business in, with 23% of the global sample selecting it from the list. Abu Dhabi is second with 21%, followed by London and Hong Kong (both on 16%) and Tokyo (15%).

Paris is seen as the best city to visit; 21% say it is one of the best destinations for tourism. Rome comes second on this measure on 20%, overtaking New York which scored 16% this year.

Zurich is the top destination to live in. Selected by 18% of our sample it is narrowly ahead of Sydney – the city that also came second on this measure in 2013 – on 17%. Abu Dhabi has moved from seventh to third on this measure over the same period.

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OPPORTUNITIES FOR SOCIAL MOBILITY ARE IN DECLINE



Among members of the British public, there is considerable scepticism about the scope for social mobility and only a minority believe young people have bright prospects ahead of them says findings from The Sutton Trust.

Key findings include

- Members of the general public are equally split on the chances for social mobility, being as likely to disagree (42%) as to agree (40%) that there are equal opportunities for people to get ahead.
- Only three in ten (29%) believe that today's youth will have a better life than their parents' generation; in contrast, almost half (46%) say they will have a worse life.
- These findings are considerably more negative than those recorded in previous years. For example, the proportion who agree that there are equal opportunities for people to get ahead is considerably lower than in 2008 (40%, compared with 53%).
- When asked what is most important for getting ahead in life, members of the public are most likely to say 'ambition' is either essential or very important (76%).

[Read more ...](#)



OVER A THIRD OF CONSUMERS BELIEVE SOCIAL PURPOSE SHOULD COME BEFORE PROFIT



The public have a strong belief that the current way of doing business isn't working and their desire to see business to do more to make a positive difference.

Research released in partnership with Neil Gault & Associates and Forster Communications highlights a number of key findings.

- Just **18% of consumers agree the current economic system is working well for them** and less than a third believe it is working well for businesses
- Almost half of consumers (47%) believe that ethically run businesses are better for the economy and almost exactly the same proportion (48%) prefer to use or purchase from businesses that act ethically
- 37% believe businesses should put social purpose ahead of making profits
- 70% more likely to purchase products or services from businesses paying employees a fair wage and 47% more likely to do the same for businesses which have a positive stance on social issues
- 49% would not take a job with a business they believe to behave unethically

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PUBLIC VIEWS OF POLICING IN ENGLAND AND WALES IN 2016/17



A research report for Her Majesty's Inspectorate of Constabulary (HMIC) provides insights into current perceptions of crime, safety and local police, along with public interactions with the police.

Safety and security in the local area

- Around one in four respondents feel crime/ASB is a big problem locally and feel unsafe to walk alone at night.
- Most people have not perceived any variation in levels of local crime and anti-social behaviour in the previous year (70%).

Image and reputation of local policing

- Just over half are satisfied overall with local policing, three times more than are dissatisfied (unchanged from 2015).

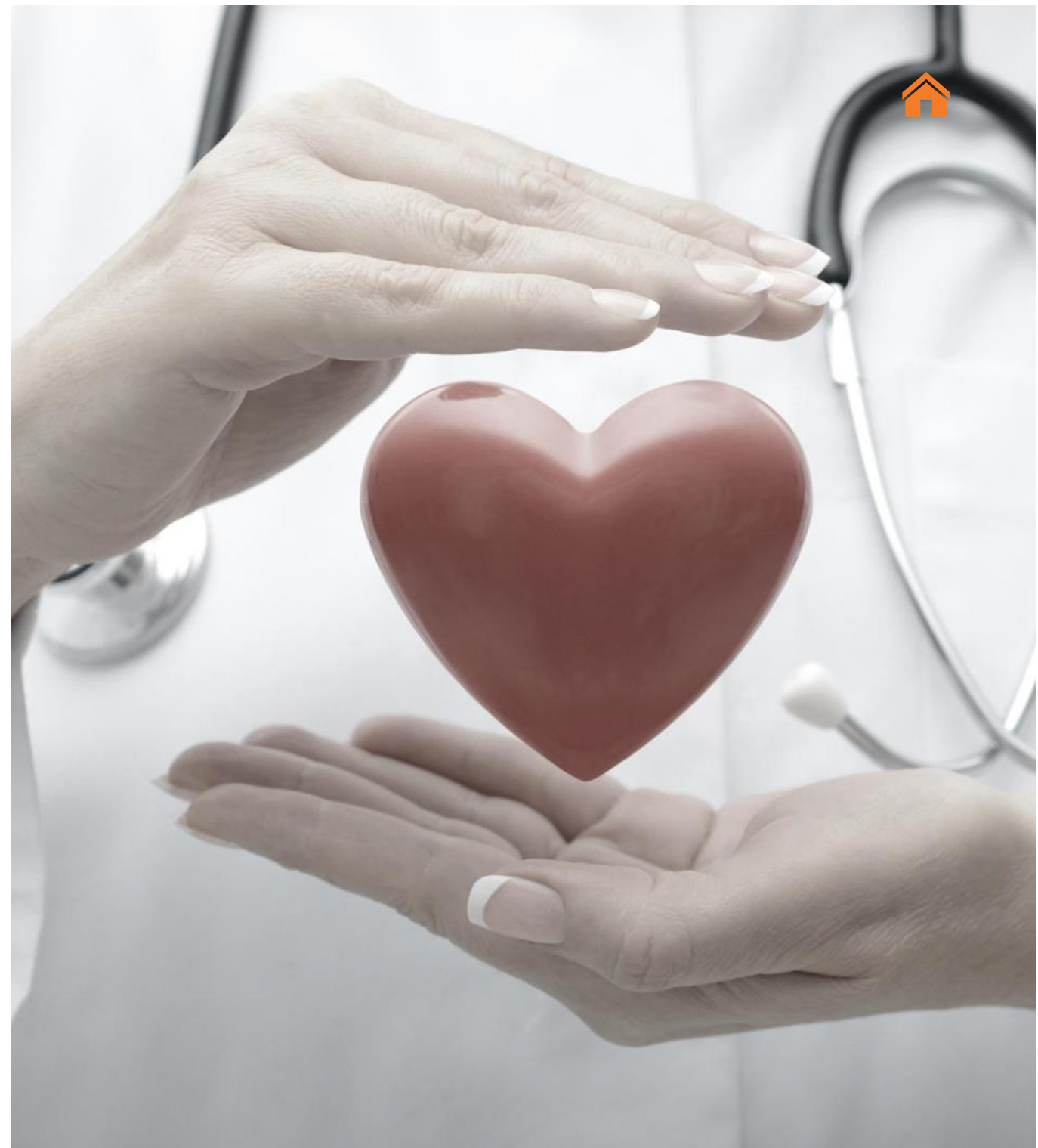
Priorities and responsibilities of local policing

- Two thirds identified 'responding in person to emergencies' and 'tackling crime of all types' as key priorities for the police's time and resources nationally

[Read more ...](#)



HEALTH



FOOD HANDLERS AND NOROVIRUS TRANSMISSION



Norovirus affects three million people a year, with a significant proportion of these cases due to the consumption of contaminated food. This research was commissioned to understand and change food handler behaviour.

Key findings include:

- Participants often reported recognition or awareness of the term norovirus but knowledge about norovirus was typically very low. There was often either a lack of knowledge or confusion about what norovirus is, and how it is contracted and transmitted.
- Lack of knowledge of norovirus, and awareness of the relevance and implications of norovirus to food handling might have been anticipated. What was more surprising was the Knowledge and Skills gap in terms of the awareness, and application of, recommended behaviours comprising more generic hygiene practice such as what constitutes effective hand-washing.
- Environmental barriers were often identified both in terms of: characteristics of the setting (time scarcity, busyness, workload, and in the case of returning to work, money and pay); and the physical design and infrastructure of food handling environments.

[Read more ...](#)



MEDIA BRANDS & COMMUNIATIONS



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WHEN TRUST FALLS DOWN

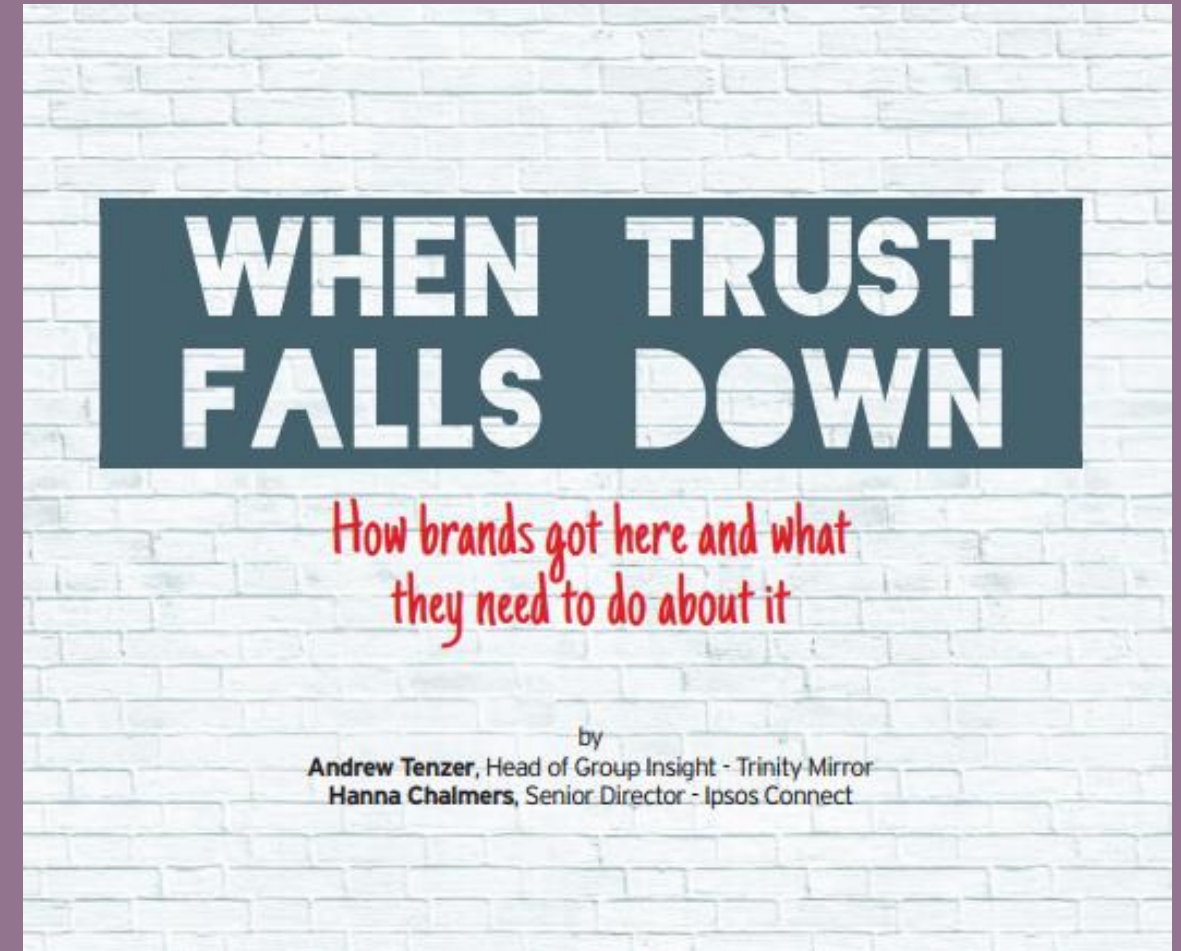


Trust in brands and advertising in the wake of Brexit and the General Election.

The key findings from the study were as follows:

- Brands and advertising face challenging times ahead as 42% of people claim to distrust brands and 69% distrust advertising.
- Brands are seen to be part of the establishment, with 38% of people give brands a score of 7+ on a scale of 0-10 where 10 is 'completely establishment'.
- Brands are out of touch as people don't perceive their own lives to be represented in advertising, particularly life outside of London.
- Brands are undermining their own credibility - 58% of adults don't trust a brand until they have seen 'real world proof' that they have kept their promises. 40% associate brands with being 'pushy' and 57% agree that brands should be more careful where they place their advertising.
- Advertising is not as connected to popular culture as it was with 48% of adults agreeing that they don't talk about adverts as much as they used to.

[Read more ...](#)



Optimise your digital ads, maximise your brand impact, minimise your spend.

Connect:Digital is a live website (available on desktop and mobile web browsers) where we serve your digital ads and then follow-up with a survey to test the impact the ad has on your brand. We also offer diagnosis on the creative.

Partnering with MOAT, we collect viewing behaviour of the ads within the context of a live web browsing experience. This enables ads to be evaluated in a completely realistic way, i.e. on a website where people can skip, scroll away, freely roam to another page.

It's here where we see the benefits of combining view (behavioural) and brand (survey) metrics to allow advertisers to select the best digital ads and formats before launch as well as the ability to measure view time thresholds needed to deliver against brand goals.

[Read more ...](#)

INTERNATIONAL



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SOCIO-POLITICAL & ECONOMIC TRENDS IN LATIN AMERICA



Latin America is a highly unequal region, but the middle class have been growing steadily during the last two decades. This presentation takes a closer look at our Ipsos Global Trends data in Latin America.

Economy & political

Latinos are not satisfied with their standard of living and they are very critical about their governments; due to crime, corruption and the poor quality of public services.

World and society

Support for globalisation is greater in Latin America and other emerging countries than the developed world and they have a modern view regarding the role of women and the rights of the LGBT community.

Work

Latinos are very hardworking. They are willing to change their lifestyle or sacrifice their work-life balance to succeed.

Trust

Latinos distrust their governments and public services.

[Read more ...](#)

HOUSING



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HOUSING IN CRISIS BUT GOVERNMENT CAN DO SOMETHING



Three-quarters of Britons think that there is a national housing crisis according to new research for the Chartered Institute of Housing's annual conference.

Undertaken before the Grenfell tragedy, the survey found 82% agree that "everyone should have a right to be able to live in a decent quality home whether or not they own it". Only 5% disagree.

Key findings include:

- The public largely reject the notion that there is "isn't much that British Governments can do to solve country's housing problems"; more disagree than agree by a margin of 5:1.
- They are equally clear that that buying/renting is harder than it was for their parents' generation, and that it will be harder for today's children; these sentiments have hardened since the previous Ipsos MORI/CIH survey in 2014.
- A majority, 52%, agree that there is not enough affordable housing to buy/rent locally, higher than the 41% who agree that there is a local housing crisis.

[Read more ...](#)



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OPINION



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IPSOS MORI OPINION



Will Grenfell shift public opinion about housing?

Ben Marshall looks at whether housing is now set to move up the agenda.

[Read more ...](#)

Does Shakespeare still shock?

Royal Shakespeare Company launches audience research project with Ipsos MORI to monitor emotional response to Titus Andronicus on stage and on screen.

[Read more ...](#)

Using Positive Psychology to Build Employee Engagement

Simon Davies of Ipsos LEAD looks at how organisations can use applied psychology to boost employee engagement.

[Read more ...](#)

IPSOS MORI OPINION



We need to talk about Norm!

In our latest blog, Sean Mills, Executive Director of Ipsos LEAD, explains why, when it comes to norms, you should always start with your own organisation first.

[Read more ...](#)

Opinion Polls: Why they remain the reference

The last year has seen opinion and election polling subjected to both criticism and praise. Here we review the evidence, looking particularly at recent experiences in the US, UK, France and the Netherlands.

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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

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All methodological details are available via the website links



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