

Ipsos MORI Highlights

August 2017

Brexit and the NHS remain the public's key concerns

Seven in ten Britons think the country is on the wrong track – worst rating since 2013

Fewer young people feel likely to enter higher education – concern over cost is key

Beyond Britain, global consumer confidence is on the rise



Ipsos MORI

WELCOME TO AUGUST HIGHLIGHTS

Welcome to the end of Summer! August has seen some grey weather and the public is stuck – as is the government – on Brexit and the NHS as the key issues facing the country.

Reflecting uncertainty about the impact of leaving the EU, pessimism about the future has risen, with seven out of ten now saying Britain is on the wrong track, the most negative view since 2013. Britons are notably more pessimistic than the global average, whereas global economic confidence has been rising, as we report this month. The biggest global worries are about unemployment, political corruption and poverty and inequality, but they vary dramatically around the world: 87% in China think their country is going in the right direction, but they are the most worried in the world about the environment.

At the other end of the spectrum — Mexico has now replaced South Africa as the nation which is most anxious about the direction their country is heading, with incredibly high levels of anxiety about violence and crime.

Similarly, optimism is scarce at 9% in South Africa, 12% in Brazil, 14% in Italy and 21% in Hungary.

Elsewhere in this month's round up we look at retirement, young people's attitudes to university, robo-advisers, cyber security, what worries the world — our regular study of national concerns across the planet, Canada at 150, healthcare in South East Asia, agile innovation, parents' use of smart phones when they are with their kids, and much much more.



Ben Page
Chief Executive, Ipsos MORI

ben.page@ipsos.com



IPSOS MORI'S AUGUST HIGHLIGHTS



SOCIETY

- Brexit and the NHS remain the dominant issues facing Britain
- Fewer young people feel likely to enter higher education
- Britons are getting worse at switching off from work when holidaying
- Retirement – ever?



EVENTS

- Ipsos MORI Lates with Virtual Reality, neuroscience and more...



ECONOMY & BUSINESS

- Cyber security among charities
- Robo-advisors – how much interest is there?



INTERNATIONAL

- What worries the world?
- Global consumer confidence is on the rise
- Canada's 150th birthday



MEDIA, BRANDS & COMMUNICATIONS

- The future of agile innovation
- Social media is the stand out activity of parents around children
- Passive simplicity - the future for TV & radio audience measurement
- As apps become mainstream, what behaviours do they encourage?
- Mystery shopping - seven steps to success
- When trust falls down



HEALTH

- Association of Southeast Asian Nations Healthcare



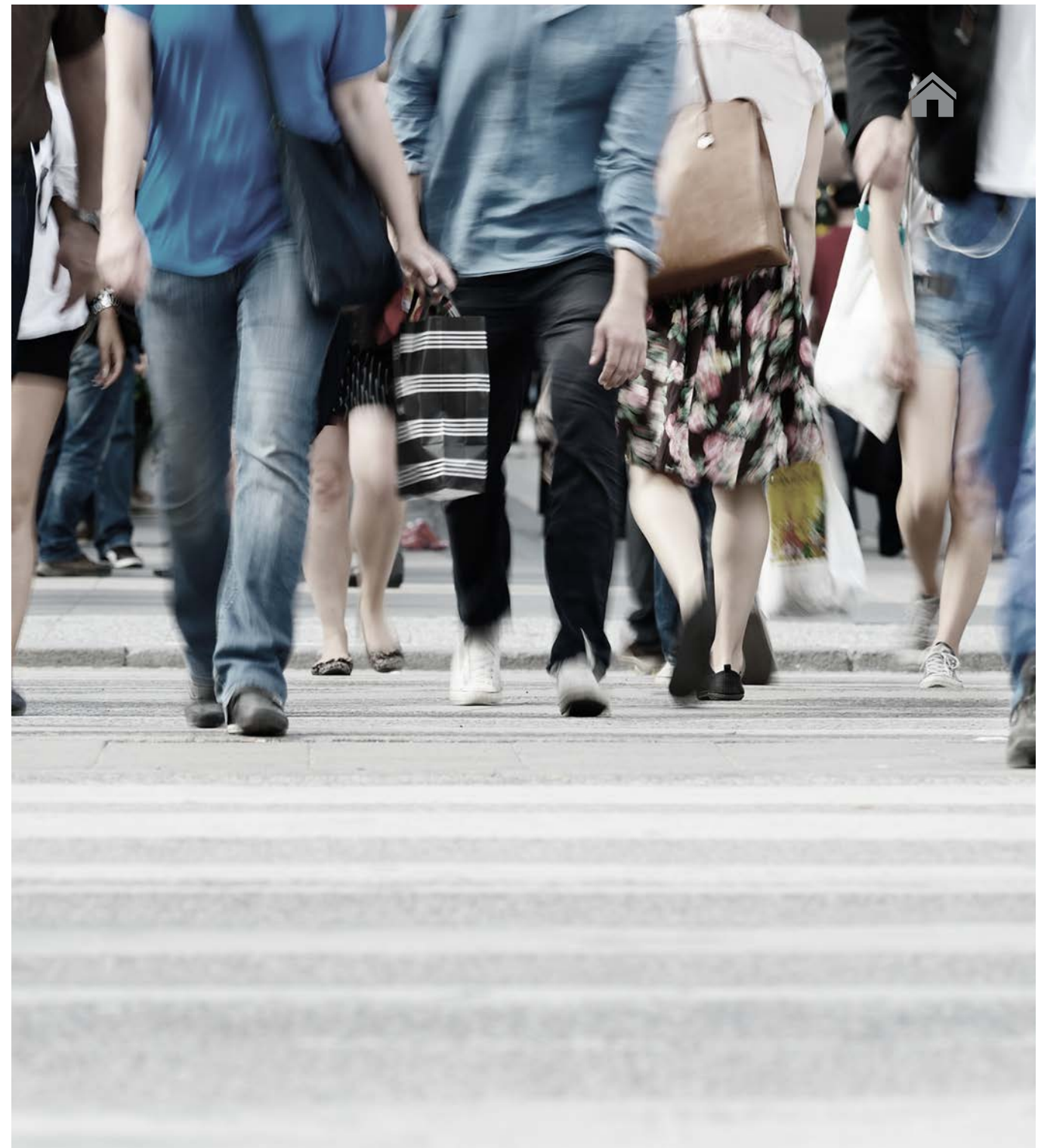
OPINION

- How to improve employee engagement in times of change



Ipsos MORI

SOCIETY



BREXIT AND THE NHS REMAIN THE DOMINANT ISSUES FACING BRITAIN



The August Issues Index continues to show Brexit and the NHS heading the public's list of the biggest issues facing Britain.

- Views on the biggest issue facing Britain vary markedly by gender and by party affiliation
- Men and Conservative supporters see Brexit as the most important issue; for women and Labour supporters it is the NHS
- Concern about the environment/pollution reaches the highest score in a decade (12%) – but it is still only tenth on the list

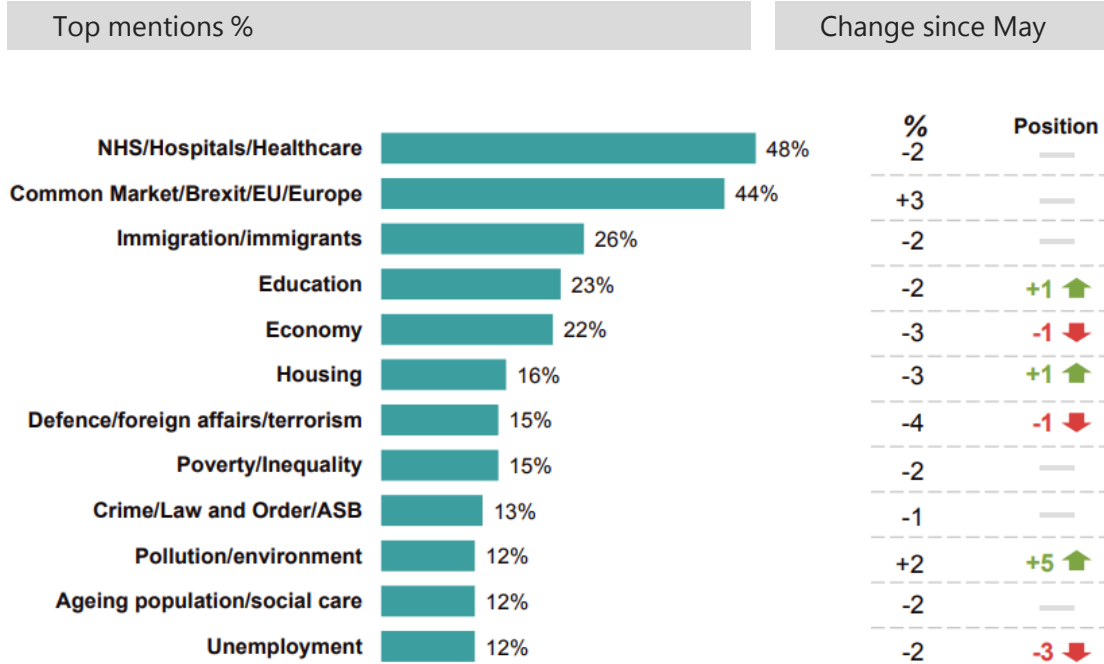
Just under half – 48% - name the NHS as a concern, while 44% say Brexit is an important issue. Brexit remains in the lead as the single biggest issue facing the country, with 30% mentioning it, compared with 15% for the NHS and 11% for immigration.

Immigration (26%), education (23%) and the economy (22%) take up the remaining positions in the top five.

Concern about Brexit is much higher among some demographic groups than others. Those from social grades AB are twice as likely than C2DEs to see it as one of the biggest issues facing the country (64% versus 30%).

[Read more ...](#)

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



Base: 1,018 British adults 18+, 4 – 10 August 2017

FEWER YOUNG PEOPLE FEEL LIKELY TO ENTER HIGHER EDUCATION



Results from our latest survey for the Sutton Trust shows an ongoing fall in the proportion of young people who feel likely to go into higher education.

Key findings include:

- Three in four (74%) feel very or fairly likely to enter higher education. This is the lowest proportion that Ipsos MORI has recorded through this survey since 2009 (when it was 73%) and represents a significant decline since the high-point recorded in 2013 (81%). The proportion who say they feel unlikely to enter higher education has also gone up (14% this year, compared with 11% in 2016 and eight per cent in 2012).
- Among those who feel unlikely to enter higher education, the most common reasons are that they prefer to do something practical rather than studying (54%), want to start earning money as soon as possible (51%), do not enjoy learning (36%) and do not feel clever enough (35%).
- Meanwhile, those who do feel likely to enter higher education are increasingly concerned about the financial undertaking involved.

[Read more ...](#)



BRITONS ARE GETTING WORSE AT SWITCHING OFF FROM WORK WHEN HOLIDAYING



A new global survey across 25 countries shows that 59% of Britons say they never check in with work while on holiday.

Key findings include:

- 59% of Britons say they never check in with work while on holiday, down from 64% in 2009. Despite this fall, we remain one of the nations that finds it easiest to log off, second only to Germany (68%).
- Less than half of the public in Spain (42%), Italy (41%) and Japan (31%) say they never check in with work while on holiday, and globally, 18 out of the 25 countries surveyed have seen a decrease in the number of people saying they switch off from work while on holiday.
- 72% of British people say they plan to spend (or have already spent) at least one full week away from their home on holiday this year, compared to a global average of 61%, and a European average of 63%.
- However, times could be changing. In 2009, Britons were the most likely to say they take all their holiday allowance off (85%), but we have now dropped down to fourth on the global list at 77%.

[Read more ...](#)



RETIREMENT – EVER?



As Prince Philip, Duke of Edinburgh, retires at 96 after 22,219 public engagements, we look at our Future of Retirement research series for HSBC and ask what people can expect of retirement today.

Many think their lives will improve once they stop working – around two in five (**39%**) think they will have a better social life and **24%** think they will have a better standard of living.

Similar proportions of those that have retired report the same.

So is life set to get even better for HRH?

For many, retirement is an opportunity to spend more time with close family and friends. According to our work for HSBC's Future of Retirement, around a quarter (**26%**) of people think their relationship with their spouse or partner will improve in retirement and **21%** with regard to their children⁽¹⁾. However, with the Queen showing no sign of hanging up her robe just yet, Prince Philip may have to focus his attention on other ambitions.

Pre-retirees tend to have many different aspirations for retirement. Holidays and travel generally top the list.

[Read more ...](#)



EVENTS



Ipsos MORI



IPSOS MORI LATES



We are delighted to invite you to join us on the evening of 14 September in a fantastic venue in central London for 'Ipsos MORI Lates' where we will take you on a tour of the world of research now and into the future.

There will be a selection of experiences ranging from immersing yourself in the world of virtual and augmented reality, harnessing social intelligence and text analytics to build a fuller picture of people's experiences, and exploring neuroscience and passive measurement to unlock 'unspoken' insights.

Alongside these experiences there will also be a series of short TED-style talks on a variety of topics including behavioural science, neuroscience and using anthropology to reveal deeper cultural truths.

And of course, you will have the opportunity to have a drink and some canapés with friends and colleagues.

[Register here ...](#)



ECONOMY & BUSINESS



Ipsos MORI



CYBER SECURITY AMONG CHARITIES



The research to explore the awareness, attitudes and experiences of charities around cyber security highlights that they may need to do more to protect themselves from online threats, but also shows the good practice among various charities in making themselves secure.

The research found that charities are just as susceptible to cyber attacks as businesses, with staff often not well informed about the topic. Awareness and knowledge varied considerably across different charities, and those in charge of cyber security, especially in smaller charities, were not often proactively seeking information on the topic, or were relying on outsourced IT providers to deal with threats.

Where charities recognised the importance of cyber security, this was often due to holding personal data on donors or beneficiaries, or having trustees and staff with private sector experience of the issue. The charities interviewed also recognised that the staff responsible for cyber security may need new skills and that general awareness among all staff needed to rise.

[Read more ...](#)



ROBO-ADVISORS – HOW MUCH INTEREST IS THERE?



At Ipsos, we've been tracking financial technology trends on behalf of our financial services clients, keeping an eye on emerging new technology and patterns. We're particularly interested in the current state of digital advisory services that debuted on the scene over five years ago: robo-advisors.

Has digital disruption in the financial industry created a win-win-win scenario for consumers, financial service companies and upstart FinTech companies? Or can the existing market dynamics support the growth everyone is banking on?

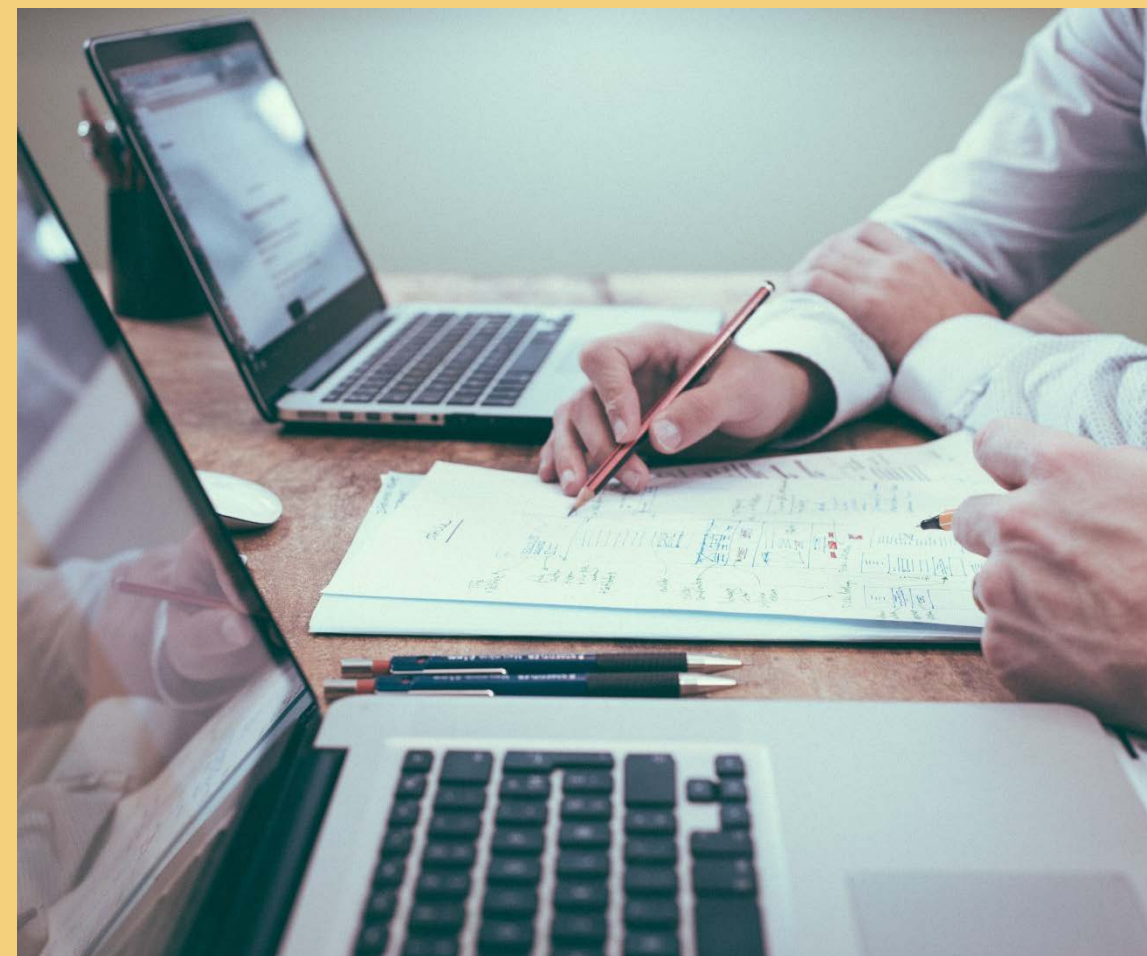
This Ipsos report uses recent research and analysis to explore the impact of robo-advisors – a new type of digital advisory service that arrived on the scene over five years ago.

Broadly defined, robo-advisors are automated portfolio management services that act with little or no direct human intervention, providing services at costs lower than those provided by financial advisors.

Both affluent investors and new millennial savers have shown significant interest, and it is likely that more corporate employees across age groups will use them in company savings plans.

The paper explores how robo-advisors are currently impacting the market and the future outlook, including the potential challenges.

[Read more ...](#)



INTERNATIONAL



Ipsos MORI



WHAT WORRIES THE WORLD?



Seven in ten Britons think the country is on the wrong track – the worst it has been since 2013, and higher than the global average of 60%.

The biggest global worries are about unemployment, political corruption and poverty and inequality, but they vary dramatically around the world -

- **87% in China** think their country is going in the right direction, but they are the most worried in the world about the environment.
- At the other end of the spectrum — Mexico has now replaced South Africa as the nation which is most anxious about the direction their country is heading, with incredibly high levels of anxiety about violence and crime.
- **Similarly optimism is scarce at 9% in South Africa, 12% in Brazil, 14% in Italy and 21% Hungary.**
- South Korea has seen the greatest move in perception with **66%** now saying that their nation is heading in the right direction— a 50 percentage point increase from May 2017 (when results were last reported), following political turmoil.
- Peru has seen the biggest deterioration with a fall of 15 percentage points in those who think the country is heading in the right direction.

[Read more ...](#)



GLOBAL CONSUMER CONFIDENCE IS ON THE RISE



July 2017's global Primary Index score of 48.7 shows a three-month gain of 1.2 point.

The Primary Index reflects attitudes of consumers in 24 countries on the current and future state of local economies, personal finance situation, savings, and confidence to make large investments, as measured monthly by Ipsos Public Affairs.

The Primary Index is up by 1.5 points or more over a three-month period in eight countries, including the United States and Canada. Largest increases are seen in South Korea (+8.1), France (+3.8), and Poland (+3.3).

Only South Africa (-3.3) records a notable drop.

Countries with the highest Primary Index scores are China (67.1), India (66.3), Sweden (62.1), and the U.S. (61.5). Those with the lowest scores are Italy (37.0), South Africa (38.1), and Brazil (38.6).

[Read more ...](#)



CANADA'S 150TH BIRTHDAY



This year, Canada celebrates its 150th birthday, with this report examining Canadian perceptions on progress, culture, identity, the monarchy, race and immigration

While half (51%) of Canadians feel there's no better time than now to celebrate, excitement is muted compared to how they felt about celebrating the 125th anniversary in 1992 (-21 pts).

This special report marking the occasion also explores:

- **Canadian culture:** 39% of Canadians picked nature and landscape as the best thing about their country. 23% say it's the people and diversity, while 17% say it's Canadian values.
- **Progress in 25 years:** Canadians see the greatest progress on gender equality, Canada's image in the world and environmental protection. Issues seen as having worsened include political leadership, responsiveness of government, and the quality of infrastructure.
- **Immigration:** While eight in ten believe Canada is a welcoming place to newcomers, many express concerns about immigration, including that it places a strain on public services (53%) and the job market (36%).

[Read more ...](#)



MEDIA BRANDS & COMMUNIATIONS



Ipsos MORI



THE FUTURE OF AGILE INNOVATION



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.

Meanwhile, 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.

Our paper explores two case studies to demonstrate the different innovation processes which have delivered positive impact. We then take a journey into the world of the military to understand how intelligence strategy can be applied to effect positive transformation in business.

[Read more ...](#)



SOCIAL MEDIA IS THE STAND OUT ACTIVITY OF PARENTS AROUND CHILDREN



Ipsos Connect's Tech Tracker shows smartphone usage is seen to increase when children are preoccupied, with social media as the stand out activity across all age groups.

Key findings include:

- Surprisingly, eating dinner is the situation where mobiles and tablets are used the least by both parents and children. Only 7% of children are permitted to use a smartphone or tablet at the dinner table, and 8% when out for a family meal.
- Smartphone ownership is almost universal amongst AB's under the age of 44,. As well as increased ownership of smartphones, usage continues to broaden with 73% of smartphone owners using their device to read or send emails in the past 3 months.

[Read more ...](#)



PASSIVE SIMPLICITY - THE FUTURE FOR TV & RADIO AUDIENCE MEASUREMENT



In the field of audience measurement, the greatest understanding comes from observations which have the least impact on behaviour.

At Ipsos we call this Passive Simplicity, by which we mean that the simplest and most natural research yields the most accurate findings.

The objective of TV and Radio Audience Measurement is relatively simple; it's about counting how many viewers or listeners there are, to which channels or programmes, and knowing who these people are.

We don't need to understand motivations or mood-states. Measurement with zero impact on participant behaviour should always be our goal and should be more achievable than in other areas of media and market research.

This paper explores the opportunities for evolving these systems towards better measurements for the future, to ensure that we achieve the greatest understanding of the audience, with the least intrusive approach, while maintaining the focus on high quality, representative and equitable datasets.

[Read more ...](#)



AS APPS BECOME MAINSTREAM, WHAT BEHAVIOURS DO THEY ENCOURAGE?



The report finds that different apps encourage different behaviours, with news app users snacking on content up to 3 times a day, whilst entertainment app users immerse themselves in programmes for up to 7 hours a day.

Apps breed new behaviours

Focussing on sports, news, entertainment, and games apps, this report identified distinct behaviour categories:

It's not just men that play games

Women of all ages are app users – more than 9 in 10 (93%) female smartphone users use apps that they've installed themselves.

Any time or place

Apps don't only reach users at lunch and during their commute, 20% of news app users check the headlines before they get out of bed in the morning.

[Read more ...](#)



MYSTERY SHOPPING - SEVEN STEPS TO SUCCESS



In this point-of-view, Ipsos Loyalty discusses how to design a “smarter” mystery shopping program that allows organisations to achieve an advantage over their competition.

In the current age of customer-centricity, consistently delivering a positive customer experience has never been more critical – or more challenging.

In this new white paper, we propose seven steps to success:

1. Start with strategy
2. Design with your customer in mind
3. Define shopper and shop requirements
4. Design a sound survey instrument
5. Create realistic shopper scenarios and thorough briefing materials
6. Formulate a smart and strategic sampling plan
7. Design your analytical plan

[Read more ...](#)



WHEN TRUST FALLS DOWN



The misjudgement of the public by politicians and commentators has caused the world of marketing and advertising to ask itself some searching questions.

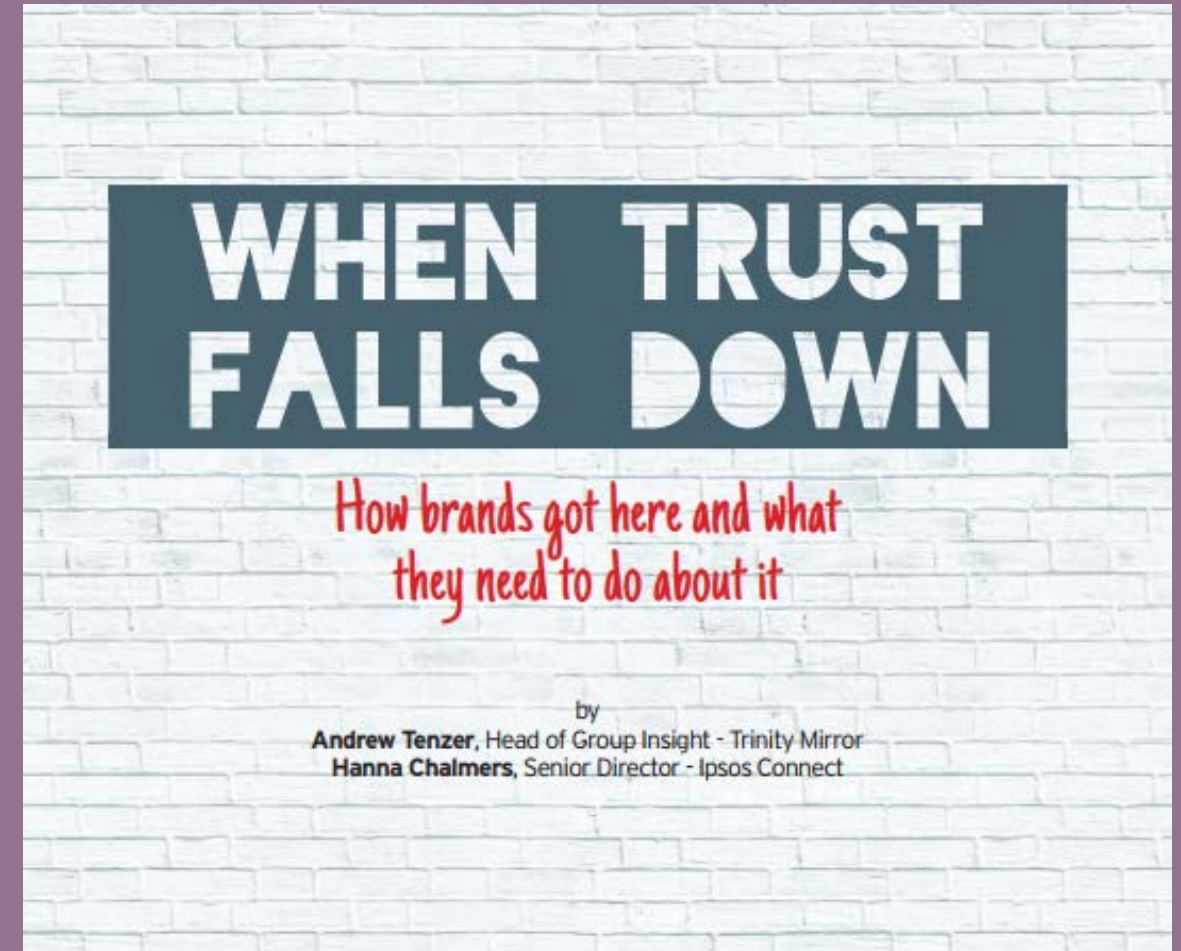
If the current political landscape points towards a rejection of the 'Establishment' by those who feel left behind by the London metropolitan elite, then what does this mean for trust in brands and advertising?

In this white paper, we look at how the attitudes in Britain that led to Brexit and the General Election result have impacted society more widely.

Findings include:

- **Brands and advertising face challenging times** ahead as 42% of people claim to distrust brands and 69% say they distrust advertising.
- **Brands are out of touch** as people don't perceive their own lives to be represented in advertising, particularly life outside of London.
- **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 ...](#)



HEALTH



ASSOCIATION OF SOUTHEAST ASIAN NATIONS HEALTHCARE



The strong growth potential of emerging economies, such as those within the Association of Southeast Asian Nations (ASEAN), continues to attract attention from global businesses.

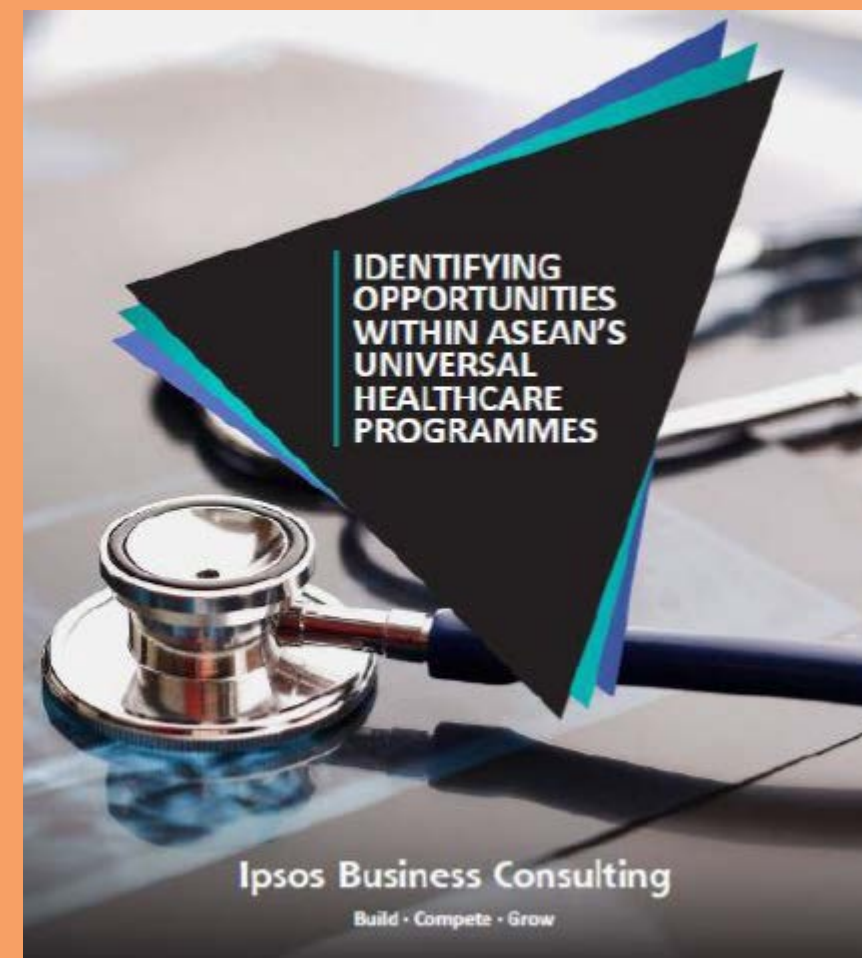
Combined, the 10 member states – Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam – account for almost 9% of the global population.

This Ipsos Business Consulting paper examines the improving economic development across ASEAN that is driving the healthcare industry's development. For example, Singapore, Thailand and Malaysia have all benefited from the rise of global medical tourism which supports quality healthcare facilities, medical professionals, hospitality and related services.

Key takeaways:

- Clear market segmentation is crucial
- Regional disparity affects patient outcomes
- Partnership with industry stakeholders is critical for understanding the evolving market landscape
- Expanding healthcare market will increase competition

[Read more ...](#)



OPINION





How to improve employee engagement in times of change

In our latest blog, Antonis Kazouris, Research Executive at Ipsos LEAD, discusses the importance of employee engagement in times of change.

[Read more ...](#)



Ipsos MORI

CONTACT US



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

Caroline Walker

Head of Clients

Caroline.Walker@Ipsos.com

All methodological details are available via the website links



Ipsos MORI

www.ipsos-mori.com/