

Ipsos MORI Highlights

November 2017

Confidence in Theresa May to get a good deal for Britain in Brexit negotiations remains low. More now say access to the single market (49%) should be her top priority, versus 37% who want to prioritise ending free movement.

Our annual Veracity Index finds trust in journalists at its highest recorded level. Politicians remain least trusted.

Majority of Britons think Trump's election has worsened America's standing in the world.

Join us for the Ipsos MORI End of Year Review 2017 on 6 December in Central London



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WELCOME TO NOVEMBER HIGHLIGHTS

Welcome to this month's roundup – in the UK Brexit remains the public's number one concern, with confidence in Theresa May getting a good deal at a low point. Confidence in both the economy and housing market are falling as uncertainty continues. More now want the Prime Minister to prioritise continued preferential access to the European Single Market (49%) over control of immigration (37%) in her negotiations.

Politics apart, trust has been a major concern this year, as our [Global Trends Report](#) highlighted in July, but actually when we look at individual professions, as we have annually since 1983, apart from declining trust in the clergy, more professions have seen rises in their credibility than falls. Journalists are now more trusted than ever (27% think they can be trusted to tell the truth), and three quarters of us trust weather forecasters!

Conversely there is still plenty to worry about – some 21% of women under 55 in Britain have been harassed online, similar to the global average of 23% in our new international survey for Amnesty International.

On technology, we look at how ready the public are for the launch of Open banking in January – at present the traditional banks, as well as known and trusted brands, appear to have a big inbuilt advantage over new entrants – but as other markets show, things can change very quickly. We also look at Virtual Reality (VR) – we have been working with the Royal Shakespeare Company to assess how live theatre, cinema and VR experiences of Shakespeare compare. The experiment involved measuring heart rate and other reactions and implies VR could revolutionise Hollywood!



We also look at our new report on sugar and how FMCG businesses should react to concerns, Black Friday, whether or not customer expectations are rising, and much more.

Finally if you're in Central London next Wednesday 6 December in the early evening, do come to our Review of the Year, where I, Bobby Duffy of the Ipsos Social Research Institute, the writer Margaret Heffernan, author of *Wilful Blindness*, former Blair speech writer Philip Collins of *The Times* and Wenda Harris Millard, Vice Chairman of MediaLink will be trying to take a glass half full look at the joys and tribulations of the year that's closing, as well as launching our 2017 Almanac and more besides.

I hope to see you there.

A handwritten signature in black ink that reads 'Ben Page'.

Ben Page
Chief Executive, Ipsos MORI

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IPSOS MORI'S NOVEMBER HIGHLIGHTS



EVENTS

- Ipsos MORI End of Year Review 2017



POLITICS

- Politicians remain the least trusted profession in Britain
- Confidence in Theresa May to get a good deal for Britain in Brexit negotiations remains low
- Majority of Britons think Trump's election has worsened America's standing in the world



SOCIETY

- Online abuse and harassment of women



ECONOMY & BUSINESS

- Great Expectations: Are service expectations really rising?
- Open Banking – are consumers ready?
- Perceptions of travel risk
- Black Friday: The Story So Far (2017)



HEALTH

- Sugar: The Reformulation Challenge



MEDIA, BRANDS & COMMUNICATIONS

- Shakespeare still has power to shock
- BBC most trusted news source
- Launching creative excellence



HOUSING

- Confidence in UK housing market slips to lowest level in five years



OPINION

- "So, it's okay to share my financial data now?"
- The Curse of Cosy
- Media Impartiality in 2017
- How SMEs are giving women more business options



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EVENTS



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IPSOS MORI END OF YEAR REVIEW 2017



Join us on December 6 in Central London for a glass of bubbly at the Ipsos MORI End of Year Review. We will look back at the events of 2017.

Ben Page, Chief Executive of Ipsos MORI will also outline findings from our global survey – Perils of Perception – where we examine people across 33 countries and look at how wrong we are about the society we live in, from predicting the levels of immigration and obesity to guessing how many people have access to the internet. It should be a fun evening of debates and drinks!

Speakers

Margaret Heffernan, Entrepreneur, Chief Executive and Author of a number of leading titles including *Wilful Blindness*, named by the FT as 'one of the best business books of the decade'.

Philip Collins, Columnist on The Times and Chair of the trustees of the think tank Demos. He was until 2007 chief speech writer to the Prime Minister Tony Blair in 10 Downing Street.

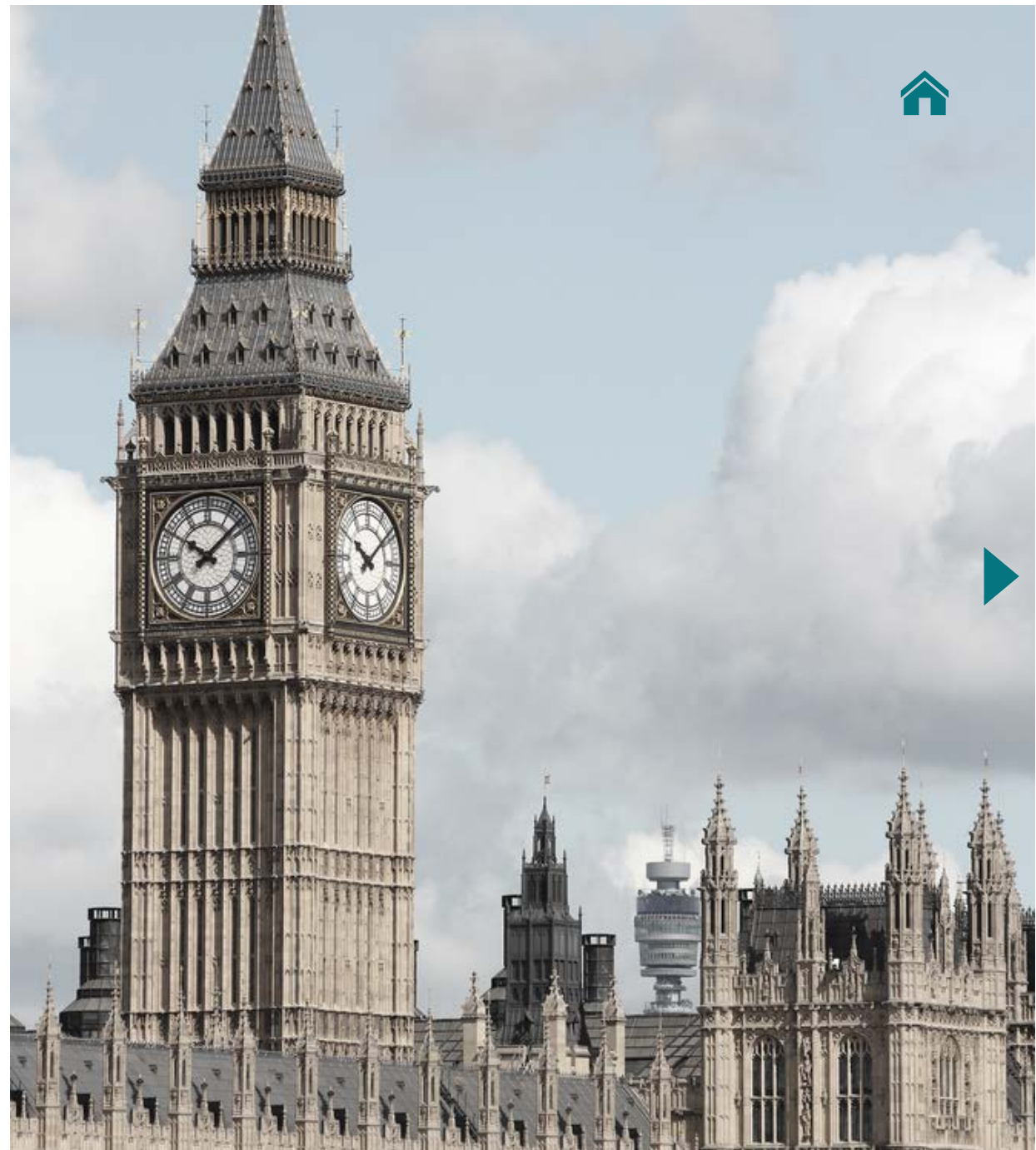
Wenda Harris Millard, Vice Chairman, MediaLink

Chair: Bobby Duffy, Managing Director, Ipsos MORI Social Research Institute

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POLITICS



POLITICIANS REMAIN THE LEAST TRUSTED PROFESSION IN BRITAIN



The 2017 edition reveals the esteem the British public holds for a variety of professions, with some fresh additions in the form of weather forecasters and professional footballers. Trust in journalists is now the highest we have ever measured (27%).

Nurses remain the most trusted profession in Britain. Ninety-four per cent trust them to tell the truth, just ahead of doctors (91%).

Government Ministers and politicians are again the least trusted; 19% trust Ministers and 17% trust politicians more generally. In a follow-up wave conducted after numerous sexual harassment cases in Parliament came to light, trust was at 22% and 20% - not significantly different to the scores beforehand.

Three quarters trust weather forecasters to tell the truth (76%), making them the seventh-most trusted profession.

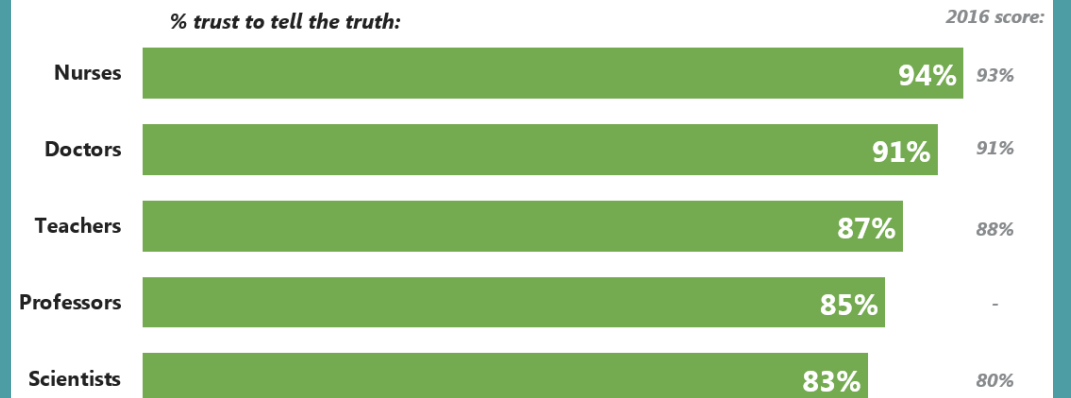
Trust in the police is at its highest recorded level. At 74%, trust has risen by 13 percentage points since 1983.

Trust in professors has risen strongly since 2011, when this profession was last included. Eighty-five per cent trust these academics to tell the truth, up from 74% six years ago.

[Read more ...](#)

The five most trusted professions, 2017

(% trust to tell the truth)



Base: 998 British adults aged 15+, fieldwork 20 - 26 October 2017

CONFIDENCE IN THERESA MAY TO GET A GOOD DEAL FOR BRITAIN IN BREXIT NEGOTIATIONS REMAINS LOW



The latest Political Monitor reveals little confidence among the public that the Prime Minister will get a good deal for Britain. More want access to the Single Market (49%) versus control of immigration (37%) to be paramount in negotiations.

- Confidence in Theresa May to get a good deal for Britain in Brexit negotiations remains low
- Half pessimistic about the economy overall - young people and graduates the most worried about impact of Brexit on their own standard of living

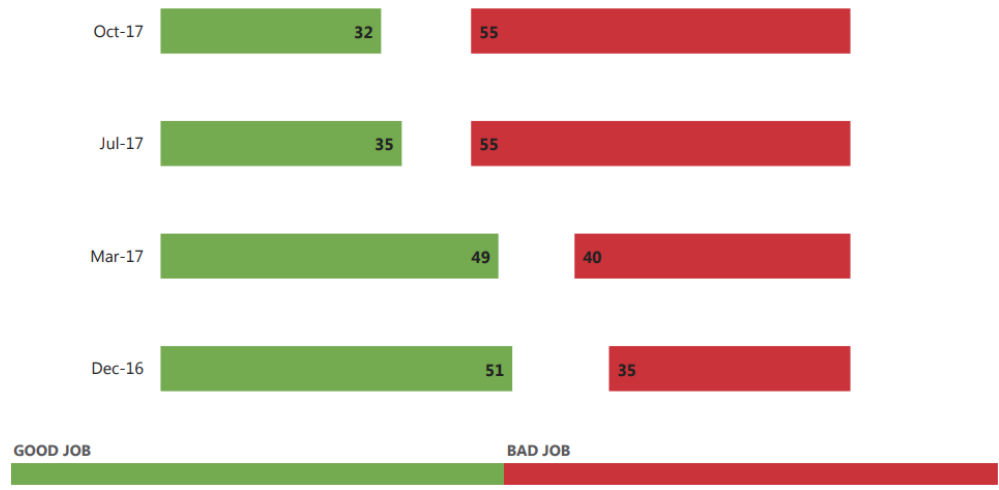
Three in five (60%) are either 'not very' or 'not at all' confident in the PM getting a good deal – just over a third (36%) are either 'very' or 'fairly' confident in her.

When it comes to the negotiations half (49%) think Britain should prioritise having access to the single market while 37% think it should be controlling immigration. There is a clear difference of opinion between younger and older people on where the priority should lie.

When asked if their own standard of living will get better or worse as a result of Brexit, a third (36%) say it will get worse compared to one in five (20%) who think it will get better – two in five (41%) however think Brexit will make no difference.

[Read more ...](#)

Do you think that Theresa May has done a good job or a bad job at handling Britain's exit from the European Union?



Base: c.1,000 British adults each month

MAJORITY OF BRITONS THINK TRUMP'S ELECTION HAS WORSENEDED AMERICA'S STANDING IN THE WORLD



It has been one year since Donald Trump was elected President of the United States and Ipsos MORI's new poll shows that his election has done little to help America's image in the eyes of the British public.

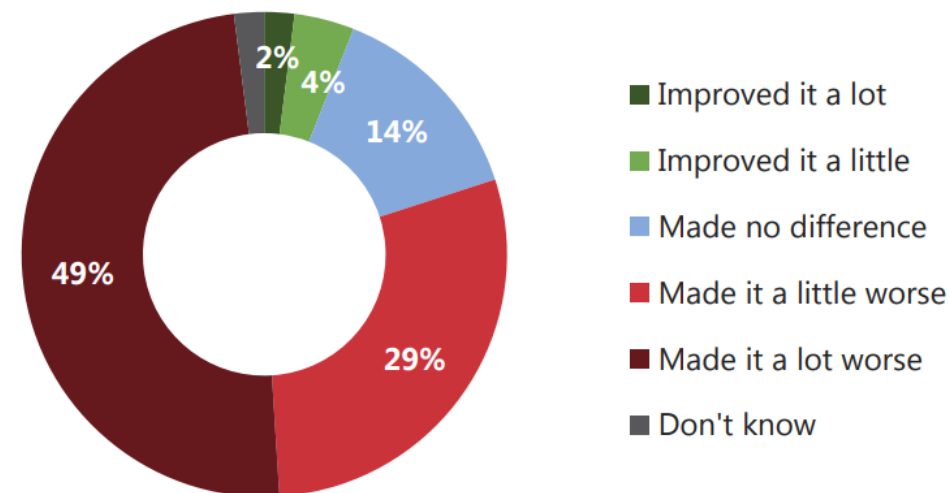
When asked what effect Mr Trump's election has had on America's standing in the world, four in five (78%) say it has made it worse (49% say a lot worse), while just 6% say it has improved.

This view is shared across demographics, but there are some differences in intensity by gender and educational attainment. Eighty-two percent of women say Trump has made America's global standing worse compared with three-quarters (73%) of men. Nine in ten (89%) of those with a degree say things have gotten worse compared with seven in ten (71%) without a qualification.

There is also some difference between political party support. Liberal Democrats are most likely to believe Mr Trump's election has tainted America's global standing with 93% saying it has got worse, as do 86% of Labour supporters and three-quarters (74%) of Conservative supporters.

[Read more ...](#)

As you may know, Donald Trump was elected President of the United States in November last year. In your opinion, what effect, if any, has Donald Trump's election had on America's standing in the world? Has it?

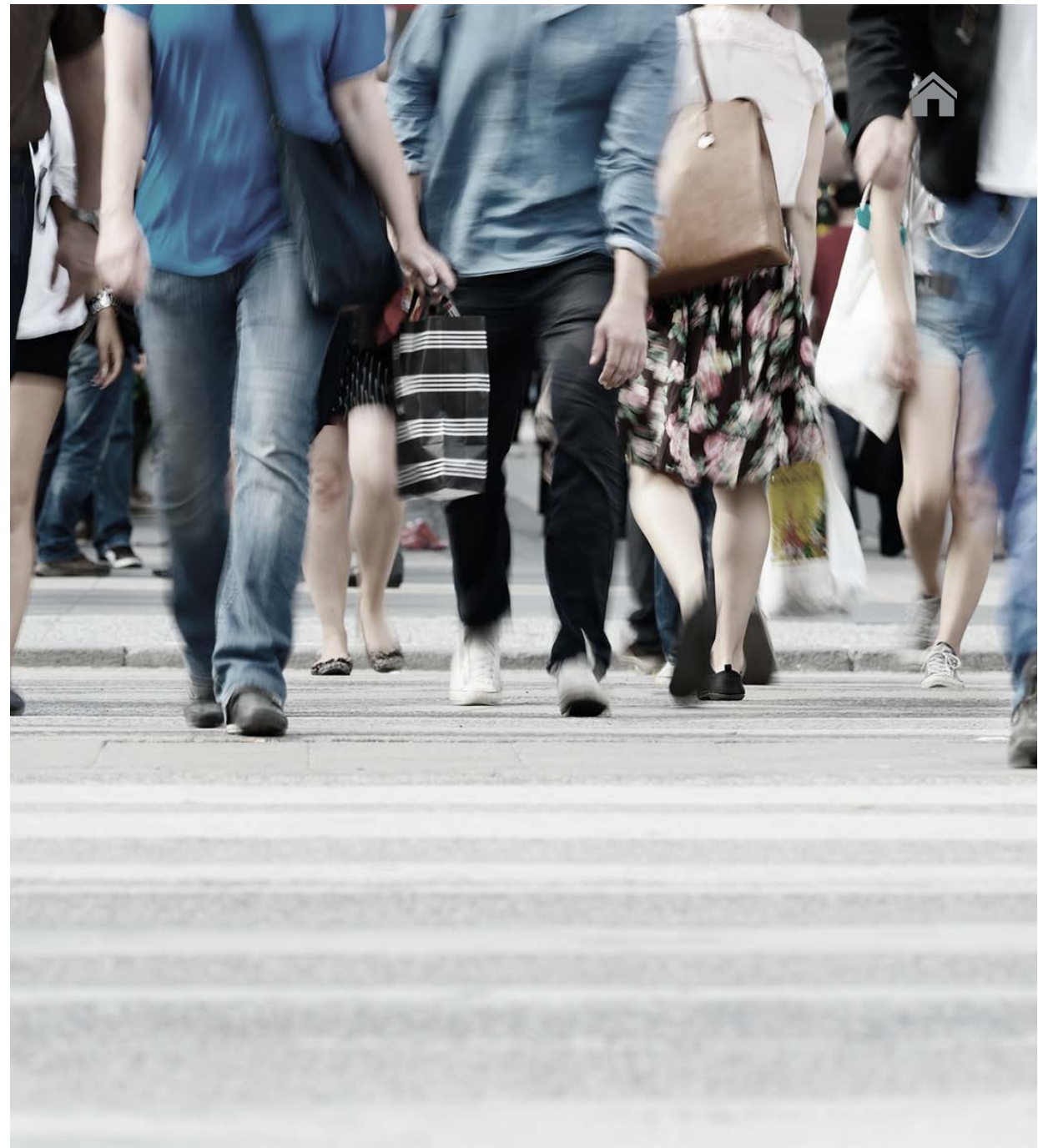


Base: 1,052 British adults 18+, 27th October – 1st November 2017

SOCIETY



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ONLINE ABUSE AND HARASSMENT



A survey for Amnesty International on online abuse and harassment which looked at the experiences of women between the ages of 18 and 55 in Denmark, Italy, New Zealand, Poland, Spain, Sweden, the UK and USA.

New research by Amnesty International has revealed the alarming impact that abuse and harassment on social media are having on women, with women around the world reporting stress, anxiety, or panic attacks as a result of these harmful online experiences.

Key findings include:

21% of women aged 18-55 in the UK reported that they had experienced abuse or harassment online, with 18% of these women saying that they had received abuse or harassment from a current or former partner, and 59% saying they had received abuse from someone that they did not know personally at all.

Across all 8 countries, 23% of women aged 18-55 who were interviewed said that they had ever experienced abuse or harassment online.

[Read more ...](#)



ECONOMY & BUSINESS



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GREAT EXPECTATIONS: ARE SERVICE EXPECTATIONS REALLY RISING?



We have combined the findings from existing and new research to explore the link between customer satisfaction at a particular service interaction and the customer's relationship with that brand.

Nearly every review of service perceptions, satisfaction or loyalty starts with the assumption that providers, both in the private and public sectors, face a world where expectations are inexorably rising. But is this true?

In both the private and public sectors, failure 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 take expectations into account.

The 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. This report uncovers the subtle but critical impact of customer expectations, and reveals five decisive factors about how service encounters can exceed or fall short of consumers' expectations in the public and private sectors.

[Read more ...](#)



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OPEN BANKING – ARE CONSUMERS READY?



With the forthcoming PSD2 directive, a new survey has built a global picture on the future 'Open Banking' landscape and discovers that, while the UK is interested in new financial technology, it remains precious about its data.

Key findings include:

- **63% of UK respondents see the forthcoming developments as 'unique'** – or in other words new and promising – to them. However, it also indicated that while **one in five (21%) people in the UK would be motivated to sign up to such platforms**, just 13% would be happy to share data with third parties at this time.
- Many people reported using products spread across multiple banks, while 41% of global respondents hold more than one financial product with their main bank. These factors possibly contributed to the all-in-one platform being considered the most popular scenario.
- In total, **57% of all respondents to the survey found the idea appealing**. However, UK respondents were more uneasy than average about the idea of having everything accessible from a single point, with more than half (55%) finding the idea unappealing.

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PERCEPTIONS OF TRAVEL RISK



Ipsos MORI's Global Business Resilience Trends Watch survey for International SOS on the perception of travel risk around the world.

The findings suggest business travellers remain nervous about international travel risks. Over six out of ten (63%) participants surveyed feel that risks to business travellers have increased, with half (52%) expecting further increases in risk over the next year.

Security threats are the most commonly reported reason for modified travel itineraries (58%). However, natural disasters (43%) and country risk ratings (42%) also account for a significant proportion of changed travel plans.

In response to travel health and security concerns, four in ten report their organisations (39%) have introduced pre-trip and during trip advisory emails.

Communicating – and making sure information has been internalised – represent the top challenges in ensuring the health and safety of travellers. Educating employees about travel risks (53%) is the top barrier, followed by confirming that employees have read pre-travel information (44%) and communicating during a crisis (also 44%).

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BLACK FRIDAY: THE STORY SO FAR (2017)



In this Ipsos Views white paper, updated and expanded for 2017, Tim Denison, Director of Retail Performance, takes us on a tour of the history of this prominent date in the retail calendar, identifies some successes (and failures) along the way, and offers some thoughts as to what the next few years might bring.

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.

Our top five steps to a successful campaign are as follows:

1. When it comes to Black Friday, there is no such thing as over-planning.
2. Agility is key.
3. Manage shopper numbers entering stores.
4. Stress-test logistics' capacity and end-to-end execution.
5. Prepare to put crisis management into practice.

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HEALTH



SUGAR: THE REFORMULATION CHALLENGE



The reduction of sugar in food and drink is one of the most effective strategies in managing the obesity crisis. Here, we discuss the reformulation challenges faced by manufacturers, and explain how our product testing expertise can help.

The rise of the sugar debate and the impending sugar tax has reignited the need for strategic product reformulation. The reduction of sugar in food and drink products is by no means the only way to achieving a healthier dietary intake, but evidence would suggest that it has the potential to be one of the most effective interventions.

One of the key challenges around reformulation is the contribution to the structure and texture that sugar affords most food and drink products. However, with the advancement of ingredients and production techniques there are workable solutions if the approach is underpinned by a solid understanding of the complex interactions that occur and their impact on consumer liking.

This paper discusses the reformulation challenges faced by manufacturers, and how these challenges have the potential to be turned to opportunity.

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MEDIA BRANDS & COMMUNIATIONS



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SHAKESPEARE STILL HAS POWER TO SHOCK



The Royal Shakespeare Company, in collaboration with Ipsos MORI, ran an innovative project to monitor the emotional engagement of a theatre and cinema audience.

As part of the RSC's continued exploration into new ways of experiencing theatre, a group of participants viewed a 360 filmed VR experience of the production Titus Andronicus. The results reveal how Shakespeare can still shock today's audience and can provoke strong emotional reactions:

- Shakespeare still shocks – as much in Cinema and in 360° as in the Theatre
- Watching Titus Andronicus raised heart rate to a level equivalent of a 5-minute cardio workout
- 360° filmed VR experience has the power to transport you into the theatre
- Theatre wins out over cinema in overall positive engagement and empathy, but the findings show Virtual Reality could revolutionise cinema.

[Read more ...](#)



BBC MOST TRUSTED NEWS SOURCE



A new survey for the BBC looks specifically at levels of public trust in news provision and people's perceptions of the impartiality of news.

The survey was designed to understand the range of scores the public gives to news providers in terms of trust and impartiality, and how the BBC performs in comparison with the wider market.

Of those adults that follow the news, 57% are most likely to turn to the BBC for news they can trust the most, whereas only 1 in 10 adults (11%) would turn to ITV and only 0.3% would turn to the Sun.

[Read more ...](#)



LAUNCHING CREATIVE EXCELLENCE



A space agency would never launch a flight without the correct readiness review. So, should you launch your creative without carrying out those critical checks?

Launching Creative Excellence is our guide to great Brand & Comms qualitative research, designed as a simple overview of all that qualitative research can offer and how to choose the approach that matches your needs.

Qualitative research can be incredibly valuable in understanding how people perceive creative content and why.

Key Qualitative Services:

Overnight Qual - Provides a quick qualitative steer to optimise creative while gaining some feedback on the 'why' behind reactions.

Creative Groups - In depth exploration of creative across all stages of development, allowing creative agency and stakeholders to view in the moment.

Communities - Communities foster comfortable environments where members speak candidly and openly, leading to in-depth consumer understanding of creative stimuli.

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HOUSING



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CONFIDENCE IN UK HOUSING MARKET SLIPS TO LOWEST LEVEL IN FIVE YEARS



Confidence in UK housing market slips in the latest Halifax Housing Market Confidence Tracker for October 2017.

The latest Halifax Housing Market Confidence Tracker (HMCT) shows a steep decrease in the House Price Outlook (HPO), down from +44 in March 2016 to +30 in October 2017. This means the HPO figure has more than halved since its peak in May 2015 when it was +68.

This figure is driven by an eight-point decrease in expectations that average UK property prices will be higher in twelve months' time (down from 58% in October 2016) and a corresponding six-point increase in expectations that average UK prices will be lower in a year's time (up from 14%).

Buying sentiment has increased by one point since March 2017, when it was at +14. The buying sentiment is thus still on a very low level, with the highest seen in February 2015 (35%). The selling sentiment is showing a 11-point decrease since March 2017, now being at its lowest levels since September 2013 when it was at -6.

[Read more ...](#)



OPINION



IPSOS MORI OPINION



"So, it's okay to share my financial data now?"

Open Banking has the potential to revolutionise the financial services industry. Here, Research Director Celine Ledbury examines how banks will need to communicate its worth to their customers – and to trust in its security.

[Read more ...](#)



The Curse of Cosy

The seemingly harmless Danish 'hygge' trend is now damaging our health, such is the way in which the British have interpreted it. It has been mistranslated as the 'easy life' and is often used as a justification for being a bit lazy.

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Media Impartiality in 2017

Independent analyst David Cowling looks at audience perceptions of bias in the media.

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How SMEs are giving women more business options

A study of SMEs across Europe found that they offer women founders new employment choices in a world where the nature of work is changing. We explore some case studies, asking women what it is exactly they find so attractive.

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CONTACT US



For more details on any of the studies featured here,
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All methodological details are available via the
website links



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