

# **Ipsos MORI Highlights**

## **October 2017**

**Britons are becoming more positive about immigration – but 60% still want it reduced**

**Britain becomes tired of austerity – support for further cuts falls from 59% to 22%, and rise in support for increased spending**

**Six in ten Britons believe religion does more harm than good**

**Resistance to self-driving cars – only 24% think they are desirable**

**Is sugar really more dangerous than gunpowder? New report**



**Ipsos MORI**



# WELCOME TO OCTOBER HIGHLIGHTS

Welcome to our October highlights – this month we examine the Tribes of Brexit in the UK, and see how attitudes to issues such as gay marriage are closely related to attitudes to Brexit, and how they crossed party lines. We highlight how the public is becoming more positive about immigration – concern has been falling for 18 months – but 60% still want to see it reduced.

Immigration has been slowing the decline of religious observance in the UK, but this month we find six out of 10 Britons, despite having a state church, agree religion does more harm than good.

As the UK Chancellor prepares a new budget our “State of the State” report for Deloitte finds Britain is tiring of austerity – an increased proportion feel affected by cuts, and the number willing to see cuts in public services to help reduce Britain’s debts has more than halved since 2010 (from 59% to 22% now). This poses real challenges for a government without a majority where the ‘spend more’ opposition is narrowly ahead in the polls.

Elsewhere, we look at the lives and work of ‘the 1%’ – the people running the world’s top businesses – and how technology dominates them. Overall we find the public becoming more wary of technology they are not used to – so Artificial Intelligence worries people, and only a quarter want completely driverless cars in our review of motoring for the RAC Foundation.

We look at sugar. It is now more dangerous than gunpowder according to Yuval Harari in “Homo deus” – the public don’t know how much they consume, but are as ashamed about it as they are fiddling sick leave or their taxes. Politicians favour manufacturers doing more.

Internationally, we look at views of aid to developing countries, what Americans believe makes you a ‘real’ American (it includes guns), attitudes to women in South Africa, how the Chinese travel (air travel is forecast to double by 2034) and much, much more.

I hope you find something useful here – please let me know what you think.



**Ben Page**  
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# IPSOS MORI'S OCTOBER HIGHLIGHTS



## POLITICS & SOCIETY

- Shifting Ground: Attitudes towards immigration and Brexit
- Public services: austerity, social care and personal data
- Rail joins housing as the top infrastructure priorities for Britons
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- Six in ten Britons believe religion does more harm than good



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- Public Health England HIV Prevention Innovation Fund
- PneuVUE®: A new view into Pneumonia among adults 65 years and over



## MEDIA, BRANDS & COMMUNICATIONS

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- Linkage Analysis: Data's hidden secrets
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## INTERNATIONAL

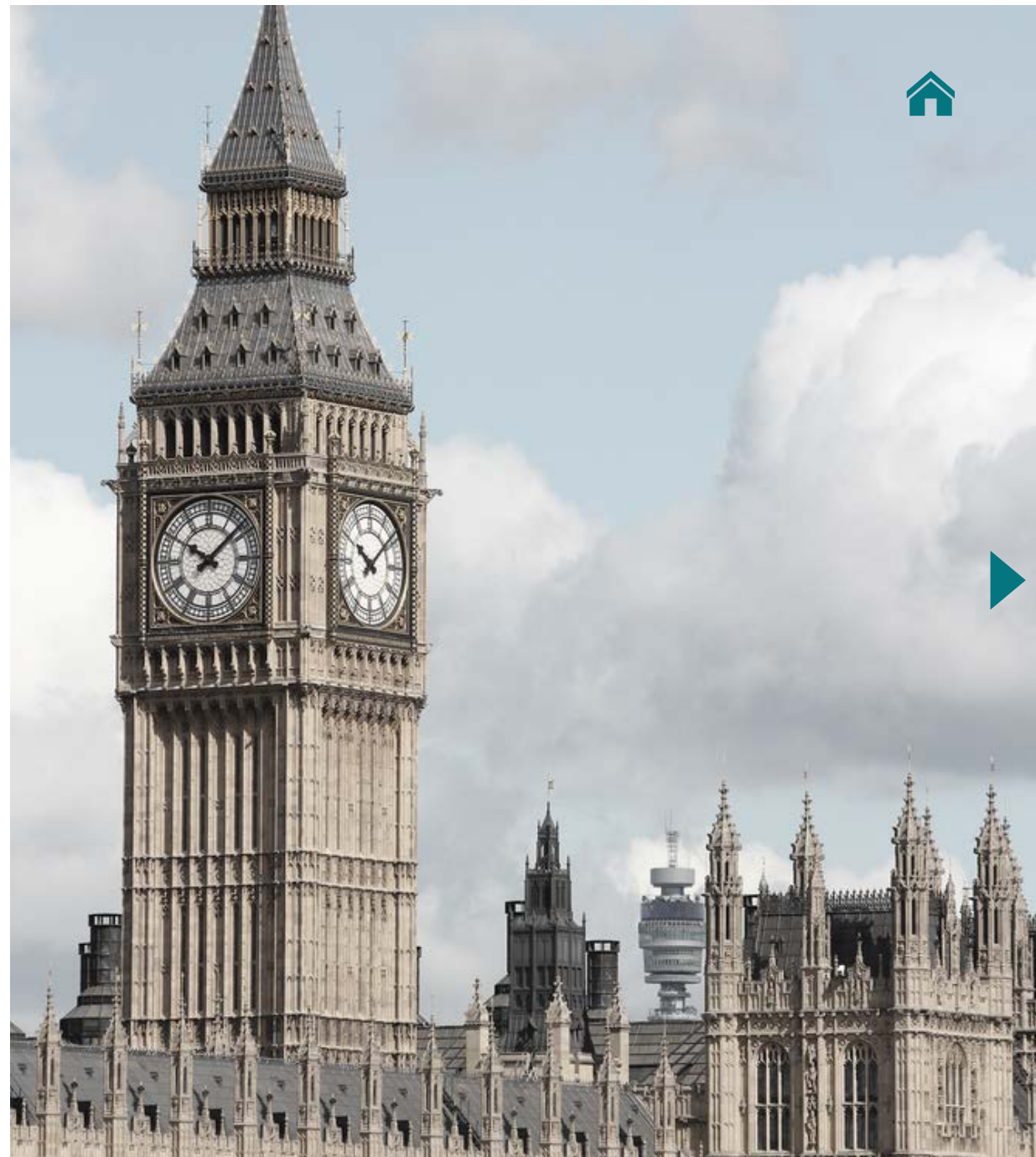
- Americans define a "Real American"
- Understanding progress on global development
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## OPINION

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# POLITICS & SOCIETY



# SHIFTING GROUND: ATTITUDES TOWARDS IMMIGRATION AND BREXIT



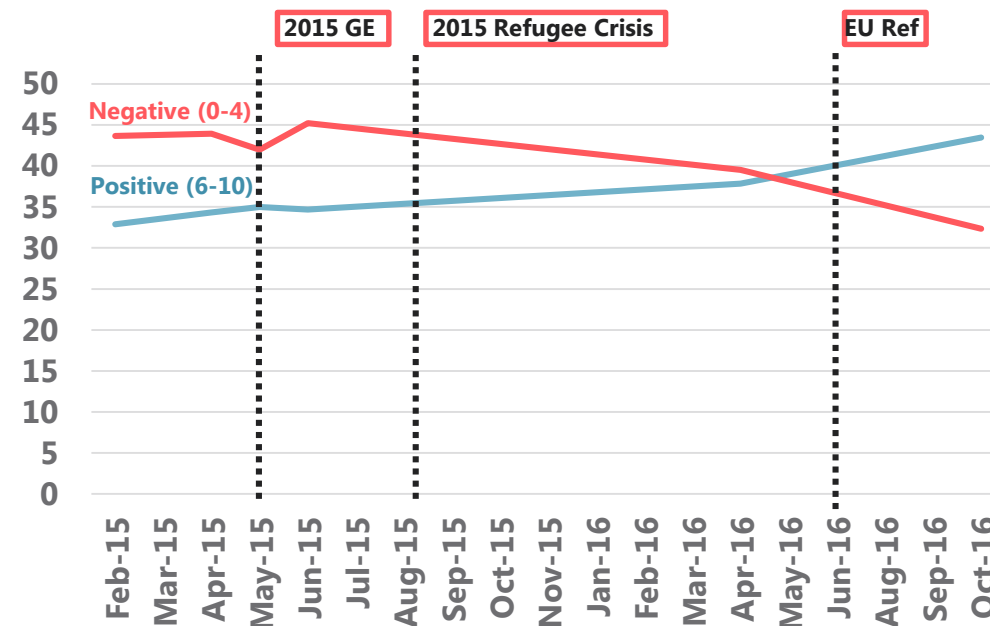
**The Shifting Ground longitudinal study finds Britons are becoming more positive about immigration, but six in ten still want it reduced.**

The report uncovers eight key findings from the study:

1. People have become MORE positive about immigration in the last few years
2. BUT the majority of people still want immigration reduced
3. Those who are most open to immigration are most stable in their views
4. There are few demographic or attitudinal differences between those who have become more positive or negative about immigration
5. Sovereignty and anti-immigrant feeling drove the EU referendum vote, but this is closely tied to a broader sense of distrust of the system and nostalgia
6. BUT there is not one type of Leave or Remain voter, demographically or attitudinally
7. Brexit has revealed new political fault lines – but other traditional party political divides remain
8. The “system is broken” for a large majority of people, but it is when this sentiment is combined with a sense of personal threat that it affects behaviour

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On a scale of 0 to 10, has migration had a positive or negative impact on Britain? (0 is “very negative”, 10 is “very positive”)



Base: 999 British adults 18+, 1 – 13 September 2017

# PUBLIC SERVICES: AUSTERITY, SOCIAL CARE AND PERSONAL DATA



The State of the State survey spoke to UK adults on their attitudes to public service spending and austerity, social care services and personal data sharing.

## Public service expectations and austerity

Most people say they remain little-affected by the cuts, but the proportion who are has risen from 23% in 2015 to a third (33%). Overall the level of support for cutting public services to reduce the national debt has halved since 2010 and people are half as likely to be willing to accept less from public services.

## Social care

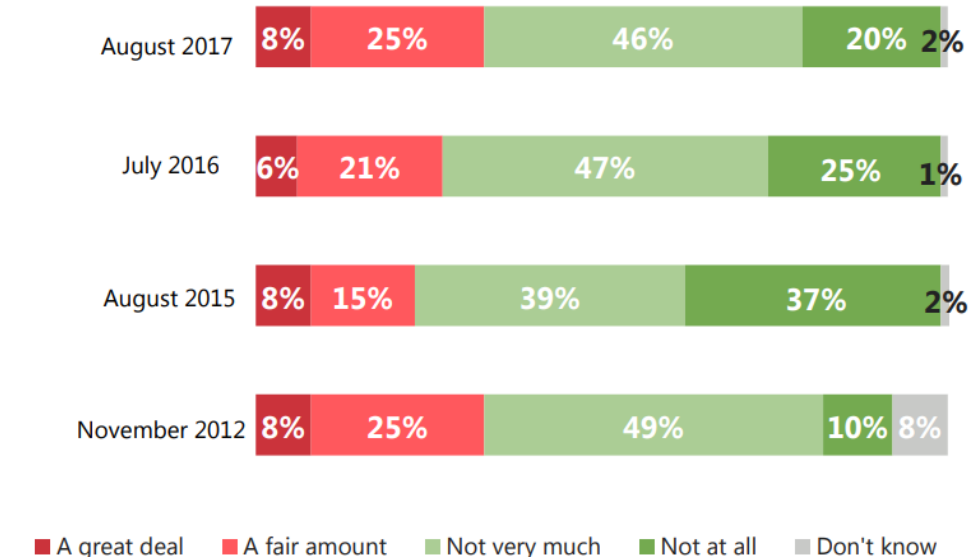
People do not generally have faith in the social care system – only a fifth (20%) think the Government has the right social care policies and two thirds (65%) lack confidence social care services will be available when they need them.

## Personal data

More people say they trust government organisations with their personal data (56%) than they do companies (31%).

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As you may know, over recent years the Government has announced a number of spending cuts to help reduce the national deficit. To what extent, if at all, have you and your family been affected by the cuts so far?



Base: 1071 UK adults 15+, 18 – 28 August 2017

# RAIL JOINS HOUSING AS THE TOP INFRASTRUCTURE PRIORITIES FOR BRITONS



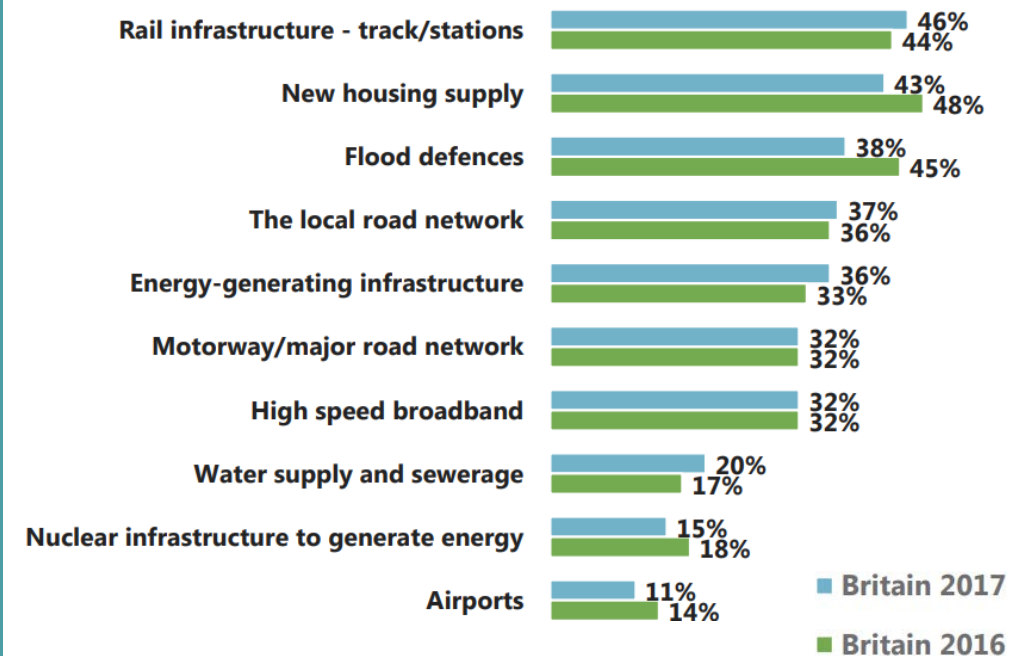
Following Chancellor Phillip Hammond's recent announcement of £300m investment in rail in the north of England, new research finds rail infrastructure to be a growing priority for the British public.

Key findings include:

- Rail infrastructure – new tracks and stations – is among the public's top priorities for investment in infrastructure in Britain, along with new housing supply and flood defences; it has moved from third to top spot in a list of ten
- Rail infrastructure is given much higher priority in Britain than in other G8 countries
- Ratings for current rail infrastructure is lower in Britain than globally, while use is higher
- While recent journeys on overground rail are rated more positively than car journeys, rail's value for money ratings compare poorly to G8 and global averages

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Which of these types of infrastructure, if any, do you think should be made a priority for investment for... [COUNTRY]?



Base: 1,004 GB adults among 21,043 adults (online), Aug-Sept 2017



# WHAT WORRIES THE WORLD?



**Unemployment remains the top issue around the world – but in Britain, healthcare and terrorism lead as the biggest worries. Seven in ten Britons think the country is on the wrong track – the worst it has been since 2013.**

**It finds that the majority of people across 26 countries think that their country is on the wrong track (59% on average)** which has remained consistent over the past four months. But there are a very wide range of different scores across the world:

China, India and Saudi Arabia remain as the top three countries most positive about their nation's direction of travel. **92% in China** think their country is going in the right direction. At the other end of the spectrum — **South Africa is the most anxious about its country's direction of travel.**

## **What worries Britain**

**Healthcare** and **Terrorism** are on a par in the British public's mind, and have a clear lead as the top issues of concern (at 42% and 41% respectively).

Following recent attacks, concern about **terrorism** has risen by 9 points from May of this year, and remains as a top issue this month. Britain is the 4<sup>th</sup> most worried about terrorism in the world.

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# SCOTTISH HOUSEHOLD SURVEY ANNUAL REPORT 2016



**The latest annual report of the Scottish Household Survey we conduct for the Scottish Government show how Scotland is changing.**

Key findings include:

- The proportion of households in the private rented sector has grown steadily from 5 per cent in 1999 to 15 per cent in 2016, an estimated increase of 250,000 households.
- A housing and wealth divide: Around two-thirds of owner-occupiers reported managing well – more than double the proportion of households in social rented properties saying the same.
- Satisfaction with local services is declining.
- More than half of see climate change as an immediate and urgent problem and more households are now disposing of their food waste in local authority-provided food caddies.
- Recreational walking (for at least 30 minutes) has consistently been the most common type of physical activity. Participation has risen from 57 per cent in 2011 to 67 per cent in 2016.

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# SIX IN TEN BRITONS BELIEVE RELIGION DOES MORE HARM THAN GOOD



**People across 23 countries are divided on religion's impact on the world, but most say they are tolerant of people with different beliefs to them. Only one in four say religion defines them as a person.**

Half (49%) in a new global study agree that religion does more harm than good in the world, and 51% disagree.

Countries which are most likely to believe that religion does more harm than good tend to be in western Europe – and also India and Australia.

Belgians are most likely to think that religion has done more harm than good – two in three (68%) agree. This is followed by Germany, Spain and Australia (each with 63%). Japan is least likely to think that religion has done more harm than good – one in four (26%) agree, followed by Russia and South Korea (both with 36%).

People are split down the middle when it comes to religion's importance to their country's moral life. Half (50% on average across the 23 countries) agree that religious practices are an important factor in the moral life of their country's citizens (50% also disagree). India and South Africa are most likely to agree that religion is important to moral life (78% and 76% respectively). Japan (15%) and Sweden (31%) are the least likely to agree.

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# ECONOMY & BUSINESS



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# GLOBAL BUSINESS INFLUENCERS 2017 SURVEY LAUNCH



**Global Business Influencers are the driving force behind business and investment decisions globally, leading their companies into a future where disruption is becoming the norm and technology is at the top of the agenda for many.**

The Global Business Influencers (GBI) are a very niche group, representing less than 1% of the population.

But, considering their influence, spending power, and the corporate budgets they control, they are a disproportionately important audience for B2B marketers. They represent the key to profitability for sectors such as finance, luxury goods and cars, airlines, and hotels.

We speak to them across Asia, Europe, the USA, China, and for 2017, we added Japan increasing the total number of countries covered to 17.

This year's survey has found technology to be the underlining issue effecting the GBI. In both their personal and professional lives, this is a demographic that are keen to be at the cutting edge of new developments. Technology informs every aspect of their lives from the way they run their companies to where they invest their money and take their holidays.

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# REAL INTEREST IN SELF-DRIVING CARS



**Ben Page presented findings on the future of driving at the Driver Ahead? Conference, with many expressing interest in automated and assisted features – but only if the price is right.**

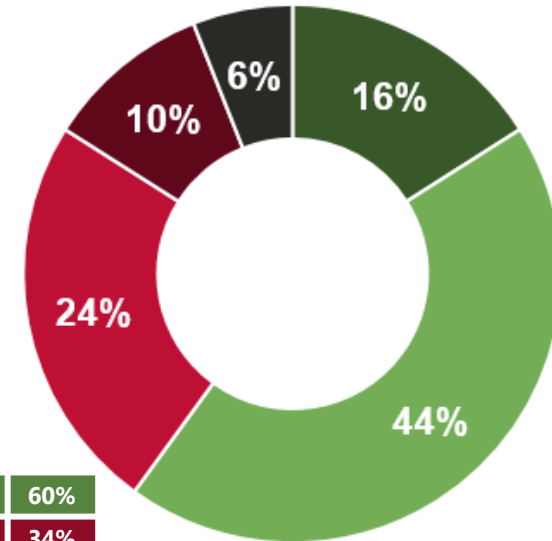
Key findings include:

- Six in ten drivers are interested in connected cars, but only a quarter want the industry to be aiming for driverless cars
- There is a real interest in driver assistance (60%) but the price has to be right with 74% of people citing price as the most important factor in helping them make their decision when buying a new or used car.
- The most important features when looking to buy are car include information about the condition of the vehicle, smart journey information, satellite navigation system and automatic emergency braking

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To what extent, if at all, would you be interested in having these 'driver assistance' technologies in your vehicle?

■ Very interested ■ Fairly interested ■ Not very interested ■ Not at all interested ■ Don't know



|                |     |
|----------------|-----|
| Interested     | 60% |
| Not interested | 34% |

Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) 14 – 18 July 2017

# MEDIA BRANDS & COMMUNIATIONS





# PASSIVE PERCEPTIONS



**Focusing on the usage of smartphones and tablets, this new thought piece from Ipsos Connect uncovers how passive measurement works and the key benefits to this technique.**

In the context of IPA's TouchPoints Daily Life Survey, Passive Perceptions explores how the combination of passively captured data, along with diary and questionnaire data, can lead to richer insights into participants' daily lives.

Key findings:

- People in the UK spend an average of 104 minutes a day using apps and websites via smartphone, compared to 61 minutes via tablet.
- App usage is nearly twice as high on smartphones as it is on tablets.
- Smartphones tend to have more apps than tablets.
- 60% of time online is spent across social, games, email and media.
- Instagram continues to grow, despite the plateau of other social media sites.
- Bespoke surveys which combine passive with additional data achieve better results.

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# LINKAGE ANALYSIS: DATA'S HIDDEN SECRETS



**In the age of big data there is no shortage of stats. Linkage analysis combines survey data with a client's in-house statistics to create richer insights.**

Linkage analysis combines data sets to extract more tangible and actionable insights. Using the example of fast food restaurants this thought piece investigates how the process works and what the key benefits of the technique are. By translating data into stories, linkage modelling can help interpret complex data sets and allow clients to make the most of their data.

## **Key Benefits:**

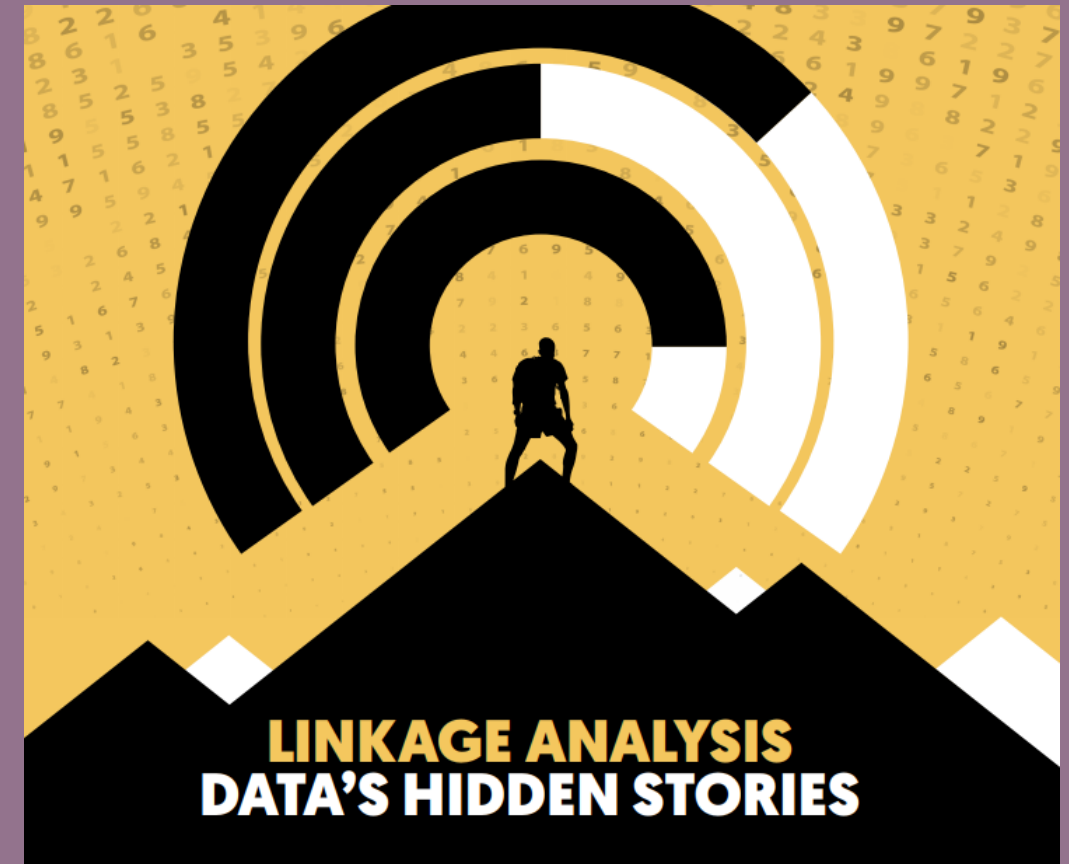
Every data set has a hidden story, and rather than delivering raw data that provides few tangible insights, linkage analysis allows us to create a narrative from the data.

We interpret the data to deliver tailored and actionable insights to our clients.

Predictive modelling allows us to find the optimum moment between factors.

These statistical processes let our clients focus on the areas that have the greatest impact on business performance, and ultimately offer the best return on investment.

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# MONTHLY TECH TRACKER



**Almost four-fifths of the population now own a smartphone (78%), and two in three people visit social media sites regularly. Facebook is hugely dominant.**

Smartphones continue to be the preferred device for accessing social media, with Facebook remaining the most visited social network (61%).

However, despite being relatively new platforms, Instagram and Snapchat have attracted more visitors than Twitter in the last three months.

Music consumption via CD has declined, which has contributed to the largest gap between CD and digital consumption since our tracking began (18% points).

However, when it comes to gaming, buying games on a disc still remains more popular than paying for a direct download.

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# ARTIFICIAL INTELLIGENCE IN AUSTRALIA



**This new report explores how much consumers understand about Artificial Intelligence (AI) and its potential role in the future.**

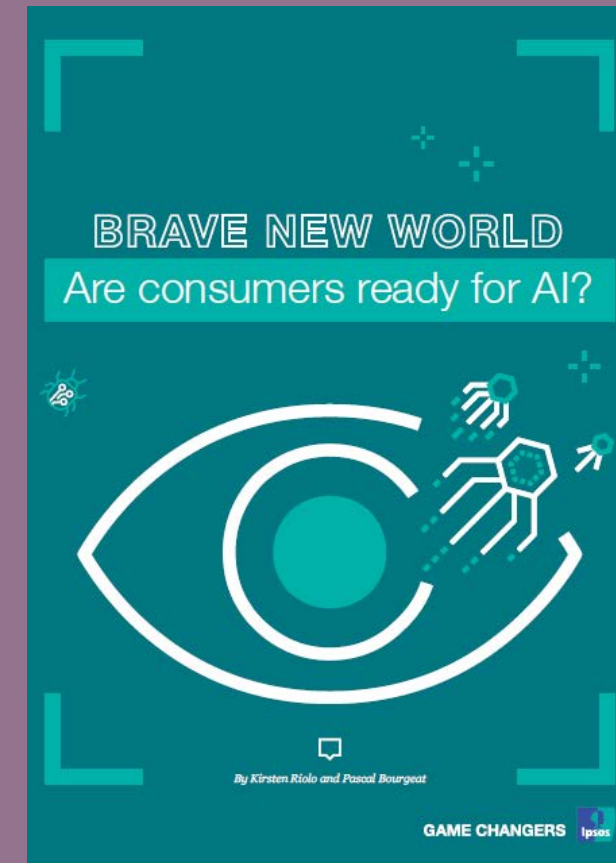
Barely a week goes by, it seems, without a provocative and usually fear-inducing media headline about AI and its potential to reshape the world as we know it.

To explore perceptions, this survey of more than 1,000 Australians reveals that most people understand little about the range of technologies that fall under the AI banner and are unsure whether to be afraid or hopeful.

On the one hand, just under half (48%) feel optimistic about the future of technology and the same proportion (48%) are looking to technology to help solve some of the world's biggest problems in the future. However, at the same time, 46% are afraid of technology taking over in the future and just over half (54%) believe that we already rely too much on technology.

In addition to the research findings, the report outlines the thoughts of Ipsos's APAC Director, Dr Pascal Bourgeat. In his piece, 'Hello to the Age of Cognition', AI is explored through the lens of Behavioural Science and sets the scene for what AI really can do.

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# HEALTH



# SUGAR: WHAT NEXT - AN IN-DEPTH REPORT



**After a review of the public and legislators' attitudes towards sugar and its future control, MPs think that manufacturers changing their recipes would be the most effective way to reduce sugar consumption.**

The top thing MPs say will reduce sugar consumption is manufacturers changing the sugar content of products. 66% of MPs say this would be most effective, around twice as many as pick out other options, such as introducing further taxes (34%), nutritional labelling (31%) and supermarkets placing low-sugar products more prominently (26%).

This support for reformulation cuts across party lines – both Conservative and Labour MPs are equally in favour.

However, when asked what they personally would *support*, there is a drop in MPs picking out changing the ingredients of products. It is still the top answer, but it is down to 46% of MPs, with most of the drop being among Conservative MPs (only 33% say they would support this, compared with 62% of Labour MPs). This may reflect concerns among legislators that reformulating products is not always as easy as it seems, or that they don't wish to interfere in product decisions in private companies.

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# PUBLIC HEALTH ENGLAND HIV PREVENTION INNOVATION FUND



## How is HIV prevention working in the UK?

The report can be used to gain insight into:

- the types of projects that were funded and how these interventions were implemented;
- achievements of the individual projects and the Fund overall;
- understanding what works in terms of HIV prevention in specific contexts;
- lessons for implementing these types of interventions, including enablers and barriers;
- the lasting legacy for the projects; and
- implications for the Fund as a whole.

The report also has value as a resource for VCS organisations in developing innovative HIV prevention approaches.

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# PNEUVUE®: A NEW VIEW INTO PNEUMONIA AMONG ADULTS 65 YEARS AND OVER



**As we age, our immune system generally declines resulting in an increased susceptibility to infectious diseases[1]. The 65-years-and-over age group is at increased risk for pneumococcal disease[2].**

The report looks at the respondents' awareness of and attitudes towards pneumonia and pneumonia vaccination within the context of our globally ageing population, as well as the changing face of this age group, relative to attitudes and behaviour around health, lifestyle and work.

Key findings include:

- Whilst the majority (85%) of adults aged 65 years and over claim to know what pneumonia is, only a-third (35%) know that there is a pneumonia vaccination
- Only 18% of the 65-years-and-over age group reported having received a pneumonia vaccination compared to 48% reporting regularly (defined as at least 4 times in the past 5 years) having had a flu vaccination
- 42% of the 65 years and over who had not received a pneumonia vaccination believe there are better ways to protect against it.

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# INTERNATIONAL



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# AMERICANS DEFINE A "REAL AMERICAN"



## What makes a “real American”?

People who believe in free speech top the list of characteristics of a “real American”, according to a comprehensive study from the US team.

Americans ranked items on whether or not they represented a “real American”, with the most popular answers being: believing in free speech (91%), caring about the welfare of all Americans equally (88%) and George Washington (88%).

At the opposite end of the spectrum, burning the flag came last on the list (13%), followed by sympathising with the Alt-Right movement (21%) and having extreme political views (32%).

Political affiliation has an impact on attitudes, with 92% of Republicans considering themselves a “real American”, compared to only 82% of Democrats.

A separate poll revealed the majority of Americans don’t understand the presidential procedure for a nuclear strike.

Republicans are more likely than Democrats to associate being a “real American” with believing in the right to bear arms (27-point margin)

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# UNDERSTANDING PROGRESS ON GLOBAL DEVELOPMENT



**Most people in developed nations know little and are far too pessimistic about the level of progress towards international development goals, according to a new 28-country study.**

Ipsos partnered with the Gates Foundation to explore public awareness of, and perceptions towards, the global progress made on battling poverty, immunisations, infant mortality and other public health issues.

Key findings include:

- Most citizens in donor countries believe that living conditions in the developing world are worsening. In fact, wrongly the majority of data actually shows marked progress towards meeting development goals.
- Few people in donor countries expect the quality of economic opportunities, health, or education in the world's poorest countries to improve over the next 15 years. Those living in those countries are far more optimistic.
- Those in developed countries (significantly) overestimate the amount of money their governments spend on development aid.

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# CHINESE INTERNATIONAL TRAVEL MONITOR



**The Travel Monitor takes a comprehensive look at the impact on global travel by mainland Chinese travellers – a large and rapidly growing market.**

Along with the growing affluence of Chinese citizens, the relaxing of visa restrictions around the world has helped encourage more Chinese international travel.

This report is based on research involving both Chinese international travellers and hoteliers around the world and includes detailed information about spending patterns, travel preferences, accommodation choices and future plans.

Key findings include:

- Over 10 million Chinese travellers visited Europe in 2016.
- Spending on travel increased across all age groups last year, but particularly for those born after the 1970s, who spent 7% more on average.
- Overall, Chinese travellers spent 28% of their income on international travel in 2016, with '90s millennials' the biggest spenders across the age groups.

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# SOME IMPROVEMENTS IN SOUTH AFRICAN PERCEPTIONS OF WOMEN



**In a positive step for gender equality, findings from a new poll have uncovered recent improvements in the overall perceptions of women in South Africa.**

Tracking the views of both men and women, the poll also explores the efficiency of government efforts in the fight for gender equality. Looking at the results over the past two years, we can see a small but significant progression in people's attitudes.

Key findings include:

- 22% of adult South Africans think that men make better political leaders than women do – in contrast to over a third (36%) in 2015.
- One in five (21%) people believe that when jobs are scarce, men should have more rights to jobs than women – compared with 28% in 2015.
- 20% think that a woman's place is in the home – a change from 24% in 2015.
- 18% believe that a boy has more of a right to education than a girl – in comparison to 21% who felt that way in 2015.

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# OPINION



# IPSOS MORI OPINION



## Has the political centre of gravity moved?

As party conferences come to a close for another year, Ben Page surveys the political opinions of the nation and explains what it all means for local government.

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## Employee Engagement Action Planning: Beyond 'thinking locally and acting globally'

In our latest blog, Simon Davies, Senior Research Executive at Ipsos LEAD, discusses why an effective action plan must support managers.

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## Smartificial Intelligence

In the age of Artificial Intelligence, who comes out on top in the fight for optimisation: man, or machines?

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