

# Ipsos MORI Highlights

## December 2017

- Our annual global Perils of Perception survey shows things are NOT as bad as they seem (and YOU think they are)
- Brexit and NHS remain key issues for the British public – as for much of 2017
- Analysis of the Issues Index reveals the five tribes of Brexit Britain
- Download our 2017 Almanac – sex, driverless cars, Virtual Reality, Jeremy Corbyn, Grenfell Tower, trust, Artificial Intelligence and booze – [here](#)



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# WELCOME TO DECEMBER HIGHLIGHTS

As we approach Christmas, here's our December round-up, including links to our annual Almanac full of facts, figures and opinion on virtually every aspect of life in Britain in 2017.

Brexit has preoccupied Britain this year, although the election showed that the country is becoming tired of austerity and is split politically. While we could summarise Britain in 2017 as divided by politics, by age, by class, rural versus urban and more, actually, we continue to share a broad set of values and aspirations – free speech, humour, home ownership, and a shared attachment to some key national institutions like the NHS, monarchy, army and BBC. Things are not changing as dramatically as headline events of the last few years might suggest.

With economic confidence under pressure, with inflation eating into real wages and rising uncertainty about the future, the British still want to feel good about themselves and the country. Brands and institutions which understand that will thrive in 2018.

All that remains is for me to wish you and yours all the best for Christmas and 2018 – and remember – as our latest Perils of Perception reminds us – things are probably better than you think!

Happy Christmas!



**Ben Page**  
**Chief Executive, Ipsos MORI**

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# IPSOS MORI'S DECEMBER HIGHLIGHTS



## POLITICS

- Brexit and NHS remain the key issues, but the emphasis varies by EU Referendum vote
- Issues Index: The five tribes of Brexit Britain



## HEALTH

- Public Health England: Public awareness and opinion survey 2017



## SOCIETY

- Perils of Perception – how we are wrong about murder, teenage pregnancy, and many aspects of society
- Almanac 2017 – our review of the trends and memes of 2017 in politics, business and society



## EVENTS

- Ipsos MORI End of Year Review 2017



## ECONOMY & BUSINESS

- Open Banking – the friction paradox
- Widespread discrimination and intolerance persists across the EU
- The Reputation Council Report – 2017
- Making Tax Digital for Business: Survey of small businesses and landlords



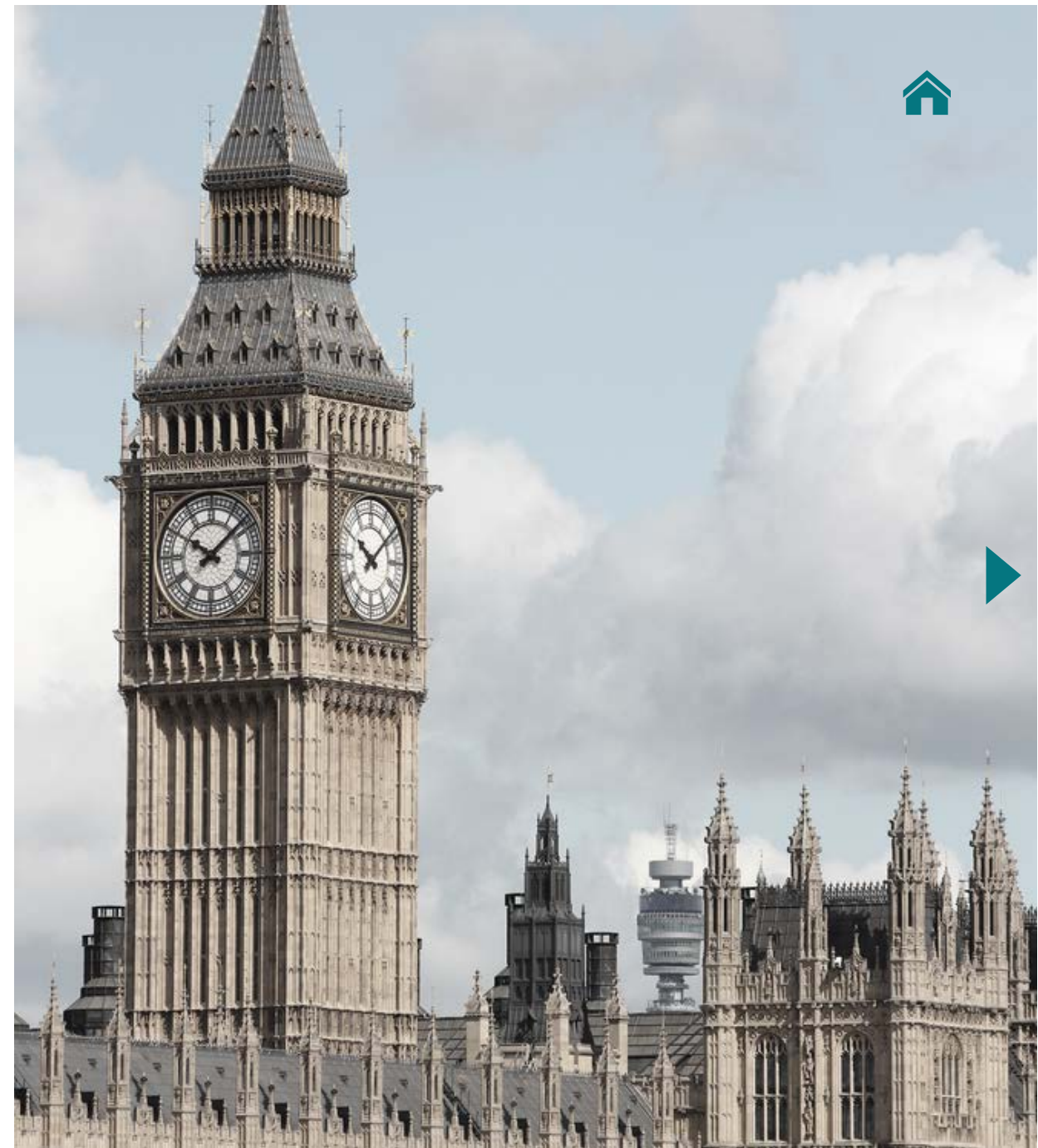
## OPINION

- The Review Culture
- New innovation finance products: qualitative research



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# POLITICS





# BREXIT AND NHS REMAIN THE KEY ISSUES, BUT THE EMPHASIS VARIES BY EU REFERENDUM VOTE



This month's Issues Index investigates differences in opinion between Remain and Leave voters and shows little movement in the order of importance assigned to the issues facing Britain.

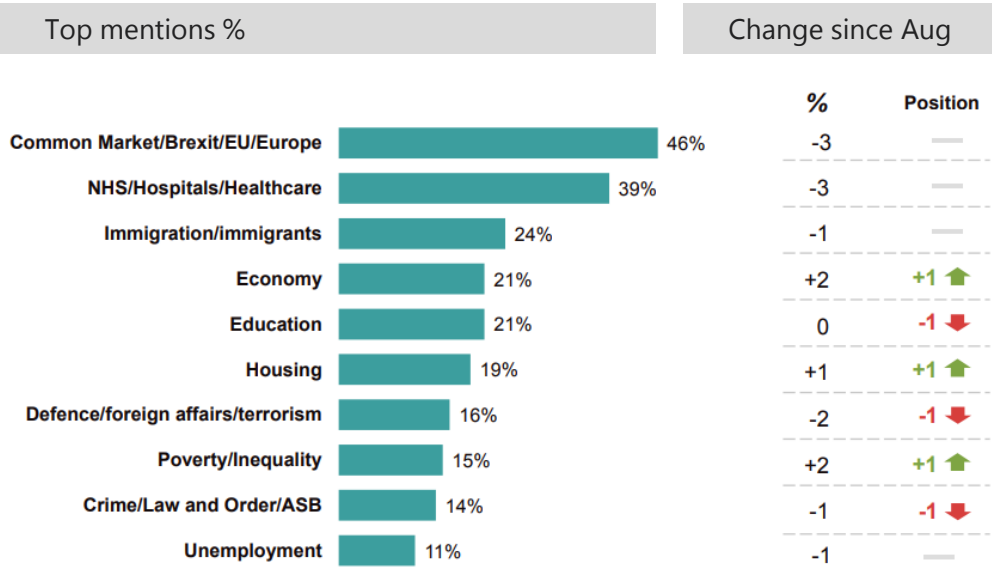
- While Brexit is the top issue facing the country for both Leave and Remain voters, those who voted Remain are significantly more likely to say they are worried about it
- Concern about the NHS is at the lowest level since October 2016 (39%), although it is still in clear second place
- Remain voters are significantly more likely to name Brexit as a big issue facing the country; leave voters feel the same about immigration

Brexit remains the biggest issue facing the country, with almost half (46%) naming it as a concern. The NHS is still in second on 39%; its importance has fallen slightly compared to earlier in the year.

When considering the single biggest issue facing the country, Brexit is also first, on 31%. The proportion naming the NHS as the principal concern has slipped since last month, so it is now below Immigration as the single biggest issue (11% against 9%).

[Read more ...](#)

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



Base: 999 British adults 18+, 3 – 14 November 2017

# ISSUES INDEX: THE FIVE TRIBES OF BREXIT BRITAIN



**A new segmentation of 2017 Issues Index data reveals a five-way split in public views on the most important issues facing Britain. The result of this analysis is five “tribes”, connected by their increased likelihood of selecting particular issues.**

## **Young Urban and Unengaged (28% of the public):**

Members of this group are younger, more urban-based and more ethnically diverse than the wider population.

## **Bothered by Brexit (26% of the public):**

Slightly older than average, members of this group are more middle class, and much more male than the British public overall.

## **Traditional Misgivings (21% of the public):**

The oldest and least ethnically diverse grouping, they are more female than male and the most likely to have no formal qualifications.

## **Public Service Worriers (21% of the public):**

Two thirds female, this group are strongly middle class, and over half hold a degree.

## **The Hyper-Concerned (4% of the public):**

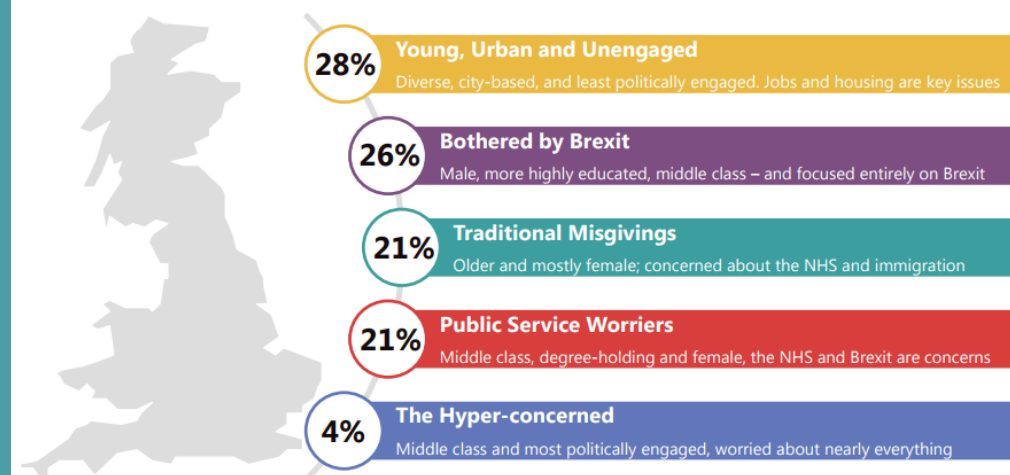
Another middle class grouping, a high proportion have a degree. This group is also the most suburban or rural-based and middle aged.

[Read more ...](#)

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

Top mentions %

Change since Aug



Base: 999 British adults 18+, 3 – 14 November 2017

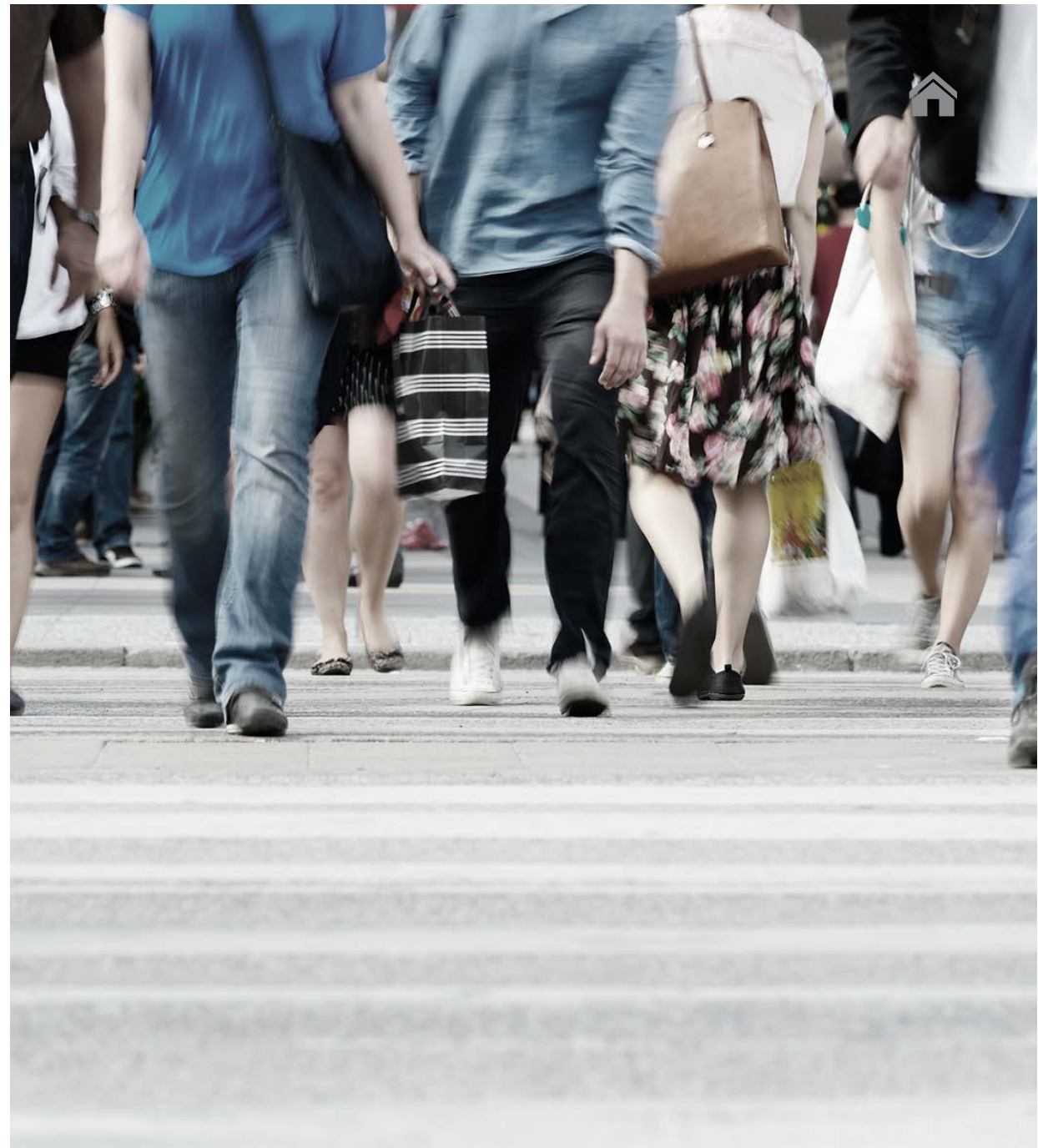


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# SOCIETY



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# PERILS OF PERCEPTION



**The latest Perils of Perception survey highlights how wrong the online public across 38 countries are about key global issues and features of the population in their country.**

On many subjects – murder rates, terrorist deaths, teenage pregnancy, diabetes and how healthy people feel – things are NOT as bad as they seem!

Some of the key patterns are:

Only 7% of people think the murder rate is lower in their country than it was in 2000 – but it is significantly down in most countries, and, across the countries overall, it's down 29%.

Only 19% think deaths from terrorist attacks are lower in the last 15 years than they were in the 15 years before that – when they are significantly down across most of these countries, and overall they are around half the level they were.

We get some things very wrong in Great Britain...

Murder rate: the large majority of people in Britain think the murder rate is higher now than in 2000, when it is actually around 29% lower. A third (36%) think it's higher, 39% think it's about the same, and only 19% correctly guess that it is lower.

[Read more ...](#)





# ALMANAC 2017



**The Ipsos MORI 2017 Almanac is our review of the year - insight and analysis of a memorable year as seen through our researchers' lens.**

Welcome to our round up of 2017. This year Britain has been portrayed as divided, split between the 'haves' and the 'have nots', Millennials and Baby Boomers, Brexiteers and Remainers, 'Somewheres' and 'Anywheres', or the experts and the rest.

We in the UK are not alone in experiencing uncertainty about the future, as the pace and reach of change accelerates. Our Global Trends Study found one of the starkest themes is the underlying sense of fragmentation across many spheres of life and an increasing disillusionment with how the world is. This is epitomised by a wave of populism and a feeling of 'being left behind' experienced by huge numbers across every continent. This is a genuine global crisis of elites. In every country we study, the majority view is that the economy is rigged to the advantage of the rich and powerful.

[Visit the microsite](#)

[Read more ...](#)



# ECONOMY & BUSINESS



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# OPEN BANKING – THE FRICTION PARADOX



**Friction can help ensure that people don't stumble into making unwise financial choices. With Open Banking on the horizon, how much friction is enough, and when might it not be as useful?**

There have been scores of articles reflecting on the exciting opportunities Open Banking offers for consumers and providers, the dramatic impact on the competitive environment, the potential security risks of sharing data and a myriad of other perspectives. The big unknown is still how consumers will actually react when faced with the reality of new services, new providers and new ways of doing things.

In principle, they should recognise and embrace the opportunities. Most of us are time-poor and keen to have greater control; for instance, our recent Global Trends Survey shows that 55% of UK adults wish their lives were more simple. Allowing third-party providers access to our data could provide clear benefits, making it easier to manage our personal finances and giving us access to faster, more efficient processes. However, the reality is that not everyone who could benefit will act. There is a good deal of friction that will need to be overcome.

[Read more ...](#)





# WIDESPREAD DISCRIMINATION AND INTOLERANCE PERSISTS ACROSS THE EU



**The main results of the Second European Union Minorities and Discrimination Survey highlight the need for specific and stronger measures to provide legal protection against discrimination, coupled with effective sanctions**

The survey asked about experiences of discrimination, harassment, police stops, and rights awareness, as well as markers of integration, such as the sense of belonging and trust in public institutions, and openness towards other groups.

Some of the key findings include:

- 38% of respondents were discriminated against over the last five years with North Africans (45%), Roma (41%) and Sub-Saharan Africans (39%) particularly affected. Discrimination was greatest when it came to looking for work (29%).
- 31% of second-generation immigrant respondents experienced hate-motivated harassment in the last year. 50% of these victims were harassed at least six times in that year;
- Fewer minority members (61%) completed at least upper secondary education compared to the general population (74%). This reduces their employment chances.

[Read more ...](#)





# THE REPUTATION COUNCIL REPORT - 2017



**This year's report examines issues ranging from the impact of Brexit, and tweets from @realDonaldTrump, to the rise of corporate activism, and the implications of Amazon's Alexa giving Jeff Bezos a microphone into millions of living rooms.**

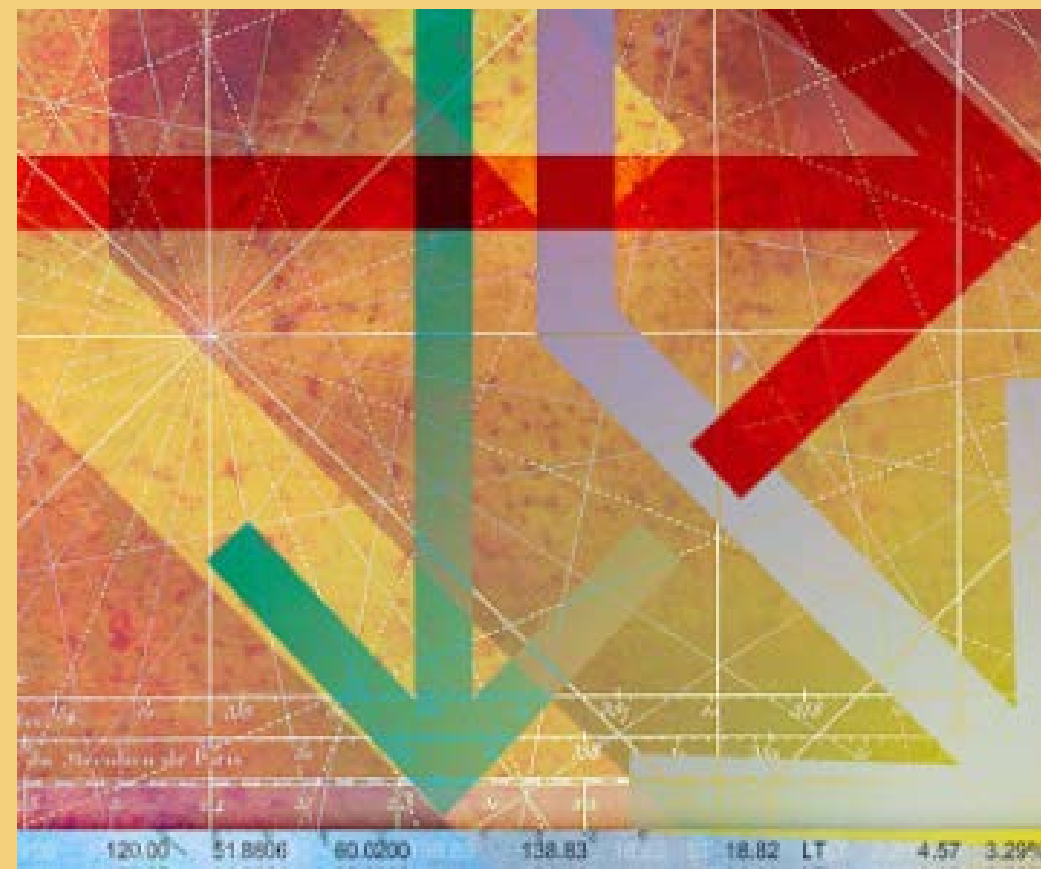
With the pace of change quickening, many companies are feeling challenged just to keep up. The established order is breaking down and agents for progressive change are no longer drawn solely from the public sector – companies are redefining their role within the context of the wider world and for many this can feel like strange and uncharted waters.

Given this complex and dynamic environment, we decided to ask Council members about the challenges they face in their day to day activities. We wanted to know how the modern day corporate communicator coped with this changing landscape.

We also felt members may have some interesting thoughts about corporate activism – specifically when it's right to take a stand and the risks and rewards of doing so. Building on this theme, we explored the importance of the 'employer brand' and asked the Reputation Council about its role in fostering reputation improvement from the inside and out.

[Visit the microsite](#)

[Read more ...](#)



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# MAKING TAX DIGITAL FOR BUSINESS: SURVEY OF SMALL BUSINESSES AND LANDLORDS



**The government has recently announced that Making Tax Digital for Business will be rolled out from April 2019 instead of 2018. This research - conducted before this change - looked at small businesses' and landlords' capacity to comply with Making Tax Digital and the support they are likely to require.**

Making Tax Digital (MTD) is a key part of the government's plans to make it easier for businesses to get their taxes right and keep on top of their tax affairs.

## **Awareness of Making Tax Digital**

The research found very low awareness of the MTD requirements among small businesses and landlords. Despite this, seven in ten expressed willingness to comply.

## **Capacity to comply?**

The vast majority of small businesses and landlords had access to digital devices that would enable them to use software under MTD.

## **Advice and support**

One in three small businesses and landlords expect that it will be difficult for them to meet the MTD requirements because of their limited ICT skills, the time it will take to prepare and provide the information and their lack of knowledge on which software to use.

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# HEALTH



# PUBLIC HEALTH ENGLAND: PUBLIC AWARENESS AND OPINION SURVEY 2017



**This is the fourth wave of Public Health England's public opinion research, conducted by Ipsos MORI, following previous waves in 2016, 2015, and a baseline wave in 2014.**

Public Health England (PHE) commissioned Ipsos MORI to conduct interviews with the public to collect quantitative data regarding levels of awareness, knowledge and opinions towards PHE, and to gain an insight into the public's main health concerns. This presentation outlines the findings of the fourth wave of the research, and also introduces findings regarding the public's attitude towards health responsibilities and interventions, generated from new questions added in this year's wave.

This year's research shows that the public's awareness of PHE is at its very highest, with familiarity of PHE linked to increased trust and confidence in its advice. Mental health is an increasingly growing concern among the public, particularly among younger age groups. In addition, it was found that, generally, the public expect government intervention around healthy living, although ultimately the individual is viewed as primarily responsible.

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# EVENTS



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# IPSOS MORI END OF YEAR REVIEW 2017



**If you missed our Ipsos MORI End of Year Review where we looked back at the events of 2017, the slides are now available for you to view.**

Ben Page, Chief Executive of Ipsos MORI, outlined findings from our global survey – Perils of Perception – where we examined people across 38 countries and looked 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.

Our speakers from the evening were:

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

[View event slides here ...](#)



# OPINION



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# IPSOS MORI OPINION



## The Review Culture

We are increasingly encouraged to rate our everyday experiences, from eating a meal, to taking a cab. With service providers now rating us, too, what does this mean for customer interaction and experience? Here, Lauren Kayser examines our 'review culture'.

[Read more ...](#)

## New innovation finance products: qualitative research

New qualitative research commissioned by BEIS to understand the appetite for different features of publicly financed debt products.

[Read more ...](#)



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