

Ipsos MORI Highlights

January 2018

- **Labour and Conservatives remain neck and neck**
- **Two thirds of FTSE 500 not confident in Government's negotiations with the EU – concern over transition period and access to labour**
- **The majority of Britons do not think that Donald Trump should be invited to the Royal Wedding**
- **Britons most likely globally to think that a major terrorist attack in their country will happen in 2018**
- **Rising concern about inflation**



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WELCOME TO JANUARY HIGHLIGHTS

With 8% of the year already gone, British politics and society remains fixated over Brexit. Labour and the Conservatives remain neck and neck, despite the fact that both the public and FTSE 500 bosses are very sceptical about the government's ability to get a good deal in the UK's exit from the EU. Overall some 69% of Labour voters are satisfied with Jeremy Corbyn vs 76% of Conservative voters with Theresa May.

Economic confidence remains weak (52% expect the economy to deteriorate), with rising anxiety about inflation – despite more optimistic growth figures globally, and despite record employment. One thing that will cheer us up, briefly at least, is the Royal Wedding set for 19 May, which most Britons are positive about, but which 69% do not want Donald Trump to attend.

Britons are most likely of 23 countries to expect a terror attack in 2018 but we seem resigned rather than afraid: our annual survey of Londoners shows that despite the attacks in 2017, more Londoners than ever feel they live in cohesive communities. Overall despite cuts to policing in recent years, and the public feeling crime is rising, our latest work for the Inspectorate of Constabulary shows satisfaction with policing is unchanged over the last three years.



As we constantly find, perception and reality are not always the same, and as one of the judges of the Royal Statistical Society Statistic of the Year, I was fascinated by the fact that only 0.1% of Britain is densely developed – whereas our last Perils of Perception study shows the public think 47% is.

We look at the 5% of us with voice activated speakers and our worries that Alexa may be listening a little too much, as well as data mining. Elsewhere, we look at what people expect the year ahead to hold – most of us think 2018 will be a better year for us personally, 40% expect a war in North Korea, and 7% think aliens will visit earth!

One of those must be right. As ever, let me know what you think!

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

Ben Page
Chief Executive, Ipsos MORI

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IPSOS MORI'S JANUARY HIGHLIGHTS



POLITICS

- Two thirds of Ipsos MORI Captains not confident in Government's ability to negotiate with the EU
- Most don't think Donald Trump should be invited to the Royal Wedding



HOUSING

- Public hugely overestimate how much land in the UK is densely built up



SOCIETY

- Britons' predictions for 2018
- Despite growing financial pressures, Londoners continue to band together
- Public Perceptions of Policing in England and Wales 2017
- Almanac 2017



MEDIA, BRANDS & COMMUNICATIONS

- How to avoid an #epicfail
- A third of adults worry about voice activated speakers recording their conversations
- Data Massaging; The benefits of a good massage



ECONOMY & BUSINESS

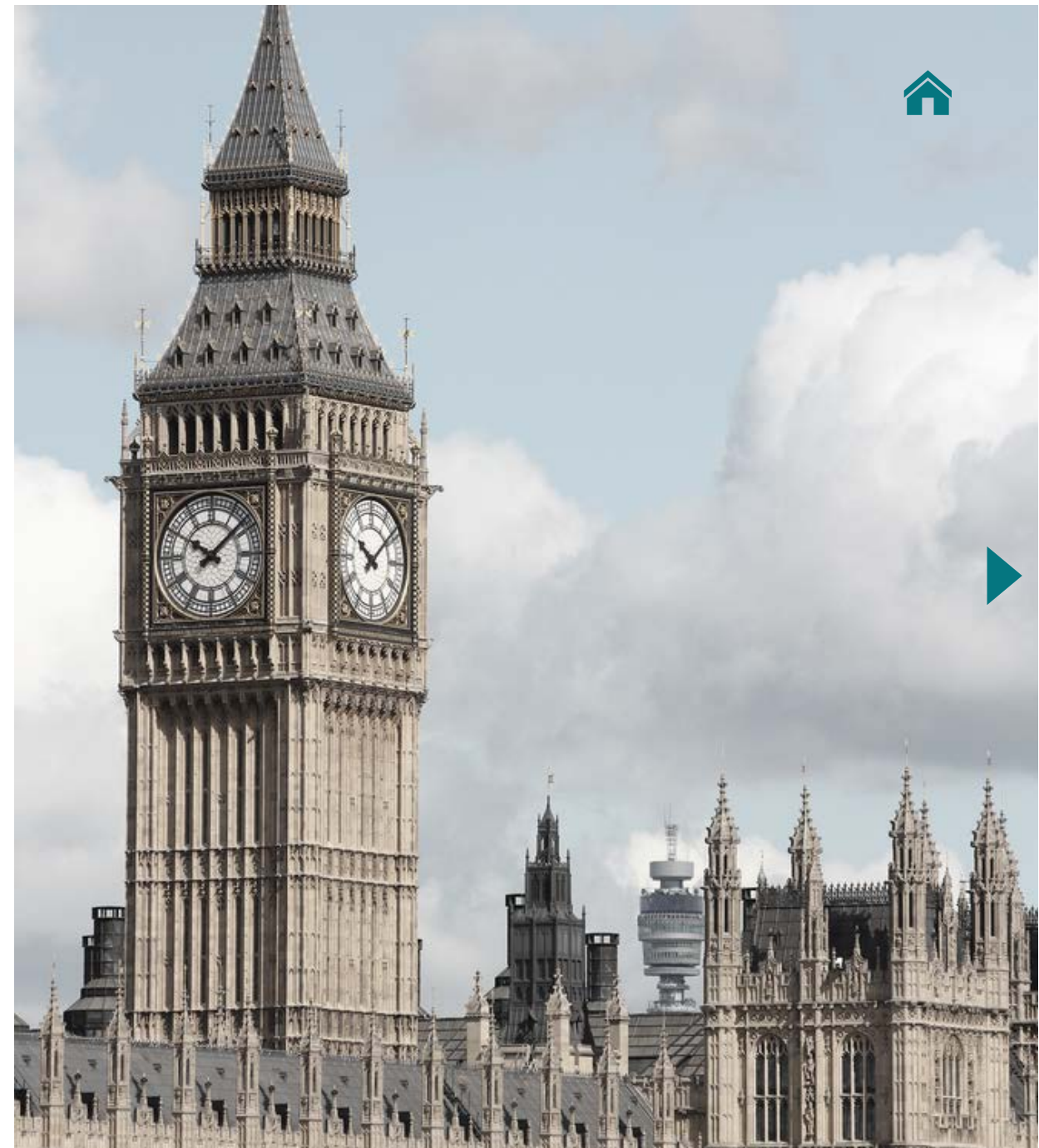
- Open Banking – the great data giveaway?



OPINION

- EU's heart might be open, but Britain's isn't
- Captains of Industry say confidence is at an all-time low
- Get Fair or Fail: Why Fairness is Key to Business Success
- Show me the money

POLITICS



TWO THIRDS OF FTSE 500 NOT CONFIDENT IN GOVERNMENT'S ABILITY TO NEGOTIATE WITH THE EU



Two thirds (69%) of Captains disagree that they are confident in the ability of the Government to negotiate the best deal possible for UK businesses with the EU.

A significantly higher proportion of London-based Captains disagree (80% compared to 60% of Captains located outside the capital). Overall, a majority of business leaders (85%) agree that how well the Government handles Brexit negotiations is vital to their business.

Unsurprisingly, 94% regard Brexit negotiations and the uncertainty surrounding them as the most important issue facing Britain today. Captains regard the free movement and access of skilled labour (53%) and securing access to free/single market (28%) as the two most important aspects for the UK to try to obtain during negotiations.

The top three aspects Captains identify as being most important for their business in order to be successful in a post-Brexit UK are a transition period after Britain has left the EU, during which some aspects of EU membership still apply to Britain (88%), reducing the level and/or complexity of regulation (83%) and keeping it easy to recruit non-EU staff (82%).

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Captains of Industry 2017

Core Question Deck for FT



Ipsos Loyalty



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MOST DON'T THINK DONALD TRUMP SHOULD BE INVITED TO THE ROYAL WEDDING



A majority of Britons do not think that the American President Donald Trump should be invited to the Royal Wedding between Prince Harry and Meghan Markle.

The new poll shows that 69% of the public believe that he should not be invited – 23% think he should. Opposition to the invitation is higher amongst younger people (79% of 18-34s compared with 59% of those aged 55+). Women are also more likely to oppose (78%) than men (58%), as are Labour voters (80%) than Conservative voters (63%).

Support for an invitation for Mr Trump is higher if former American President Barack Obama is invited. If the former President is invited two in four (39%) think Mr Trump should be invited – but a majority (54%) still think he should not be invited. (The two questions were each asked of half the sample.)

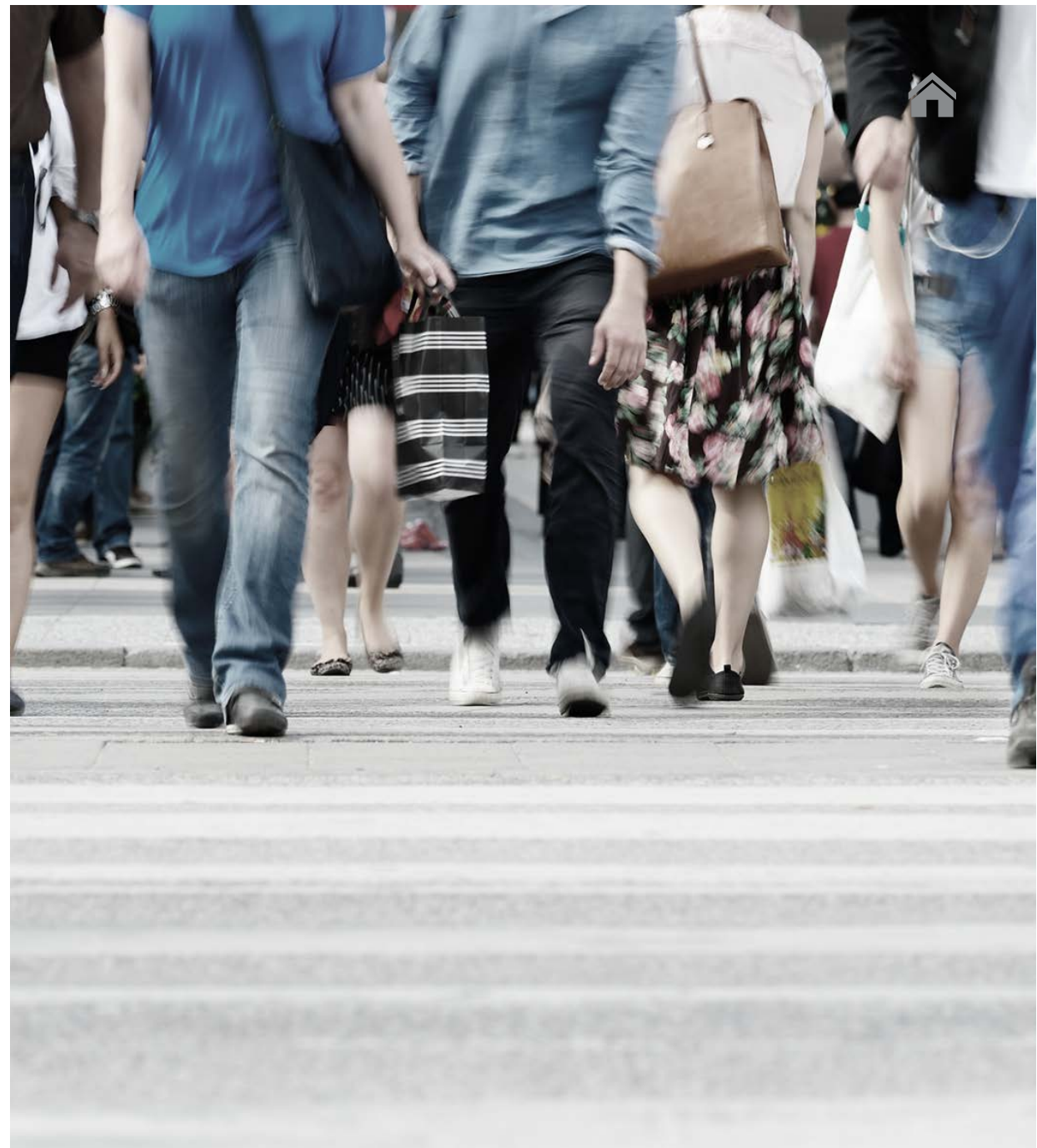
The poll also reveals Theresa May's leadership satisfaction ratings have improved slightly from November 2017. Two in five (38%) say they are satisfied (up 6 points) in her performance as PM while over half (55%) are dissatisfied (down 4) – leaving her a net satisfaction score of -17 (up 10). Jeremy Corbyn's ratings have marginally dropped since November 2017, though he still receives fewer negative ratings than Mrs May.

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SOCIETY



BRITONS' PREDICTIONS FOR 2018



In a 28 nation study, Britons are most likely to think that a major terrorist attack in their country is likely

What the Brits predict 2018 has in store

The Ipsos MORI study finds that the British are the most concerned about a major terrorist incident on home soil - 65% think it likely one will be carried out this year. Turkey (60%), France (53%), Germany (51%) and the US (51%) are also concerned, with half or more in these countries expecting an attack on home soil.

Other findings include

- Two in three say they are optimistic that 2018 will be a better year for them personally.
- Four in ten Britons think a USA-North Korea war is likely
- Some 7% expect Aliens to arrive in 2018!

The global picture

Despite a tense relationship between the US and North Korea, people are divided over the likelihood of the two countries starting a war against each other, but South Koreans are least likely to expect war..

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I will make some personal resolutions to do some specific things for myself or others in 2018



I am optimistic that 2018 will be a better year for me than it was in 2017



The global economy will be stronger in 2018 than it was in 2017



2017 was a bad year for me and my family



Base: 21,548 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., Nov 27 – Dec 8 2017

DESPITE GROWING FINANCIAL PRESSURES, LONDONERS CONTINUE TO BAND TOGETHER



Despite 2017's terrorist attacks, as the year ended Londoner's were more likely than ever to say they live in cohesive communities

Londoners still feel they live in respectful, cohesive communities, but have growing concerns over job security and their ability to afford their rent or mortgage in the coming 12 months.

Twenty-seven per cent of Londoners are concerned about being made redundant and/or becoming unemployed during the next 12 months. One quarter of survey participants are also concerned about falling behind on their mortgage or rent payments during the next 12 months. Private renters and social renters were the most concerned about this.

The majority of Londoners agree that they live in a cohesive community, as 80% of those who responded to the survey believe people of different backgrounds live alongside each other with respect in the capital.

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PUBLIC PERCEPTIONS OF POLICING IN ENGLAND AND WALES 2017



A report for Her Majesty's Inspectorate of Constabulary and Fire & Rescue Services 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

Three in ten (30%) consider crime and anti-social behaviour to be a big problem in their local area, which represents a five percentage point increase since 2015. This shift is also reflected in the increasing proportion of individuals who think that local crime and anti-social behaviour is now more of a problem than it was a year ago (23% compared with 17% in 2016 and 15% in 2015).

Image and reputation of local policing

Despite small increases in the perception that crime and anti-social behaviour is a big problem, satisfaction with the police remains unchanged, with just over half (53%) saying that they are satisfied with the police (compared with 52% in 2016 and 2015).

Priorities and responsibilities of local policing

Around two-thirds identified 'responding in person to emergencies' (67%) and 'tackling crime of all types' (63%) as key priorities for the police's time and resources nationally.

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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](#)

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ECONOMY & BUSINESS



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OPEN BANKING – THE GREAT DATA GIVEAWAY?



Open Banking may deliver the envisaged sea change in the financial services sector, but trust will be a big factor in determining who will take advantage of the opportunities. Here, Paul Stamper explains why traditional banks might be best placed, and what the new players can do to compete with them.

Giving consumers more control over their own data can only be a good thing, right? Allowing them to choose who they share it with, what for and for how long seems an obviously positive thing to do. However, when it comes to Open Banking and the possibility of sharing financial data with many different third-party providers, we need to bear in mind that this is about people's money and some of their most sensitive personal data.

The potential risks are high and there are many consumers who may be ill-equipped to understand the full implications of sharing their data. Regulation will do much to ensure that only reputable providers are operating in the Open Banking space, but that doesn't fully address the potential repercussions of giving the consumer more control of their financial data.

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HOUSING



PUBLIC HUGELY OVERESTIMATE HOW MUCH LAND IN THE UK IS DENSELY BUILT UP



Our research shows the public are very wrong about the 'UK Statistic of the Year'.

In December 2017 the Royal Statistical Society (RSS) released their UK Statistic of the Year'.

The statistic was 0.1%, the proportion of land area in the UK which is densely built up.

Following on from this, we asked the British public what percentage of land in the UK they think is densely built up. The findings show the public hugely overestimate the figure with a mean guess of 47%.

Bobby Duffy, Managing Director, Ipsos MORI Social Research Institute, said: People are way out in their estimate of how much of the country is densely built up, thinking around half the country is when actually only 0.1% is. This will partly reflect the way we live – the majority of people live and spend their time in built-up areas and this will make up most of their mental image of the country.

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MEDIA BRANDS & COMMUNIATIONS



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HOW TO AVOID AN #EPICFAIL



For brands to better leverage the increasingly connected world of social media, we've created a safe environment to test out ideas, concepts and campaigns. Welcome to Ipsos Digital Communities.

In the world as we currently know it, the consumer voice is louder and more influential than ever before. Social media allows consumers to connect instantly and frequently, sharing anything and everything with each other by just a few simple taps on a screen. Whether it's reviewing products or sharing experiences, the online consumer voice can make or break a brand in an instant.

Ipsos Digital Communities are collaborative online environments which allow you to interact with people in real-time. This enables you to really understand how people may react, what they think, do and feel and offers participants an engaging experience, meaning that brand stimulus can be quickly evaluated and optimised without the fear of an #epicfail if the communication or idea doesn't have the desired effect.

A personalised design with bespoke activities to address your research needs, online communities allow brands to learn how to adapt innovation and communications to fit with a culture, explore new ideas in a safe environment and tap into natural digital consumer behaviour.

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A THIRD OF ADULTS WORRY ABOUT VOICE ACTIVATED SPEAKERS RECORDING THEIR CONVERSATIONS



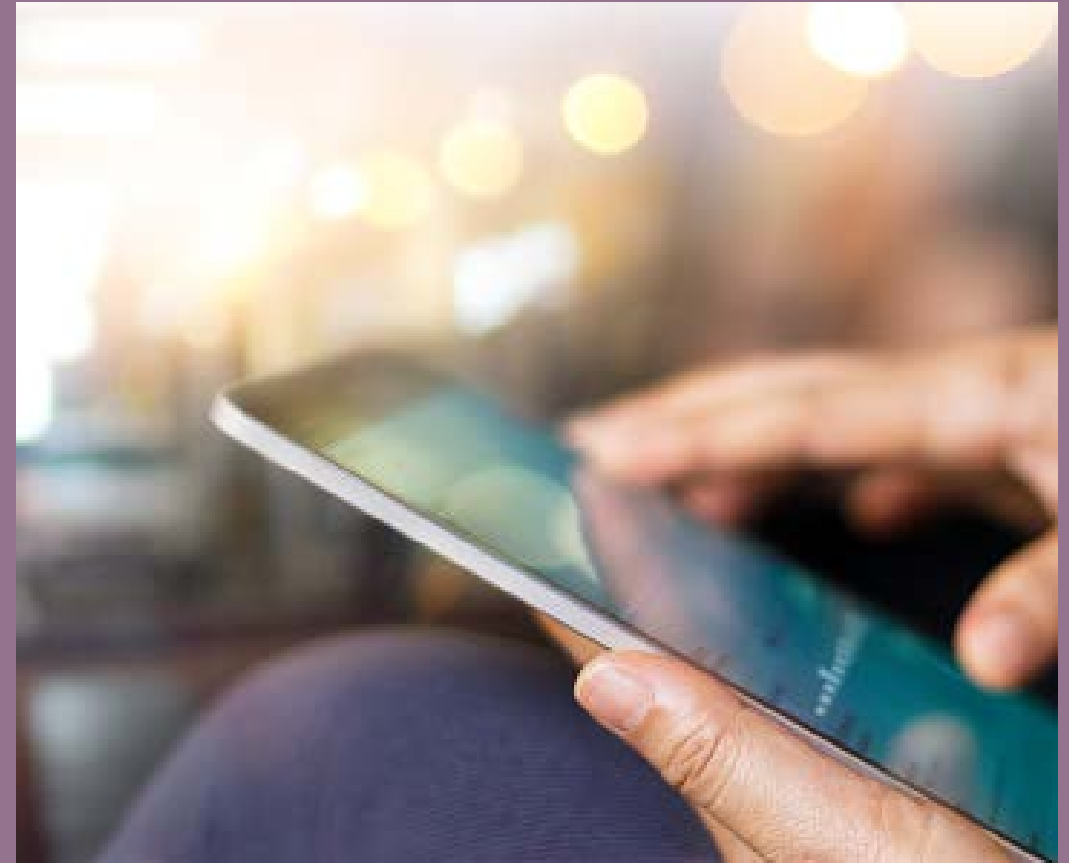
In the latest quarterly update of the Tech Tracker we investigate voice activated speakers revealing that awareness of voice-activated speakers is increasing.

Over half of GB adults claim to know a little bit about them. However, ownership is still low; 5% currently own a voice activated speaker and just 10% of non-owners are likely to buy in the next 12 months. Streaming music, listening to the radio and checking the weather are likely to be the most common activities undertaken on voice-activated speakers among non-owners. This potentially provides a huge opportunity for radio and streaming services.

Facebook remains the social media platform used by the most people in the past 3 months, with Instagram coming in second (but, still achieving less than half the number of Facebook users).

Smartphone ownership continues to rise year-on-year, with 8 in 10 GB adults owning one. However, the fight for majority ownership continues between iPhone (42%) and Android (40%). Additionally, tablet ownership is steady versus this time last year, with half of GB adults owning one.

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DATA MASSAGING; THE BENEFITS OF A GOOD MESSAGE



2018 has arrived and with it a mine of data waiting for some attention!

So, we have a database and we need to come up with a data visualisation of what it contains. Sound familiar? This may be a straightforward task, but what if the database is not formatted in the way you expect? Or the data is completely unstructured? Sounds like you may need to massage the data.

The term data massaging, also referred to as “data cleansing” or “data scrubbing”, is commonly used to describe the process of extracting data to remove - unnecessary information, cleaning up a dataset to make it useable. Databases come in different shapes and sizes and each must be treated as unique. A few data massaging techniques are required to adapt the data to the algorithms we are working with. Common tasks include stripping unwanted characters and whitespace, converting number and date values into desired formats, and organising data into a meaningful structure. Simply put, massaging the data is usually the “transform” step.

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OPINION



IPSOS MORI OPINION



EU's heart might be open, but Britain's isn't

The UK isn't changing its mind about Brexit says Ben Page in Politico.

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Captains of Industry say confidence is at an all-time low

Ben Page writes for the Times Red Box on the findings of our latest Captains of Industry study.

[Read more ...](#)

Get Fair or Fail: Why Fairness is Key to Business Success

Acknowledgement of customer experience (CX) as a driver of business performance is at an all-time high, with most companies making significant investments to meet their customers' needs. But for many the question remains, how do you choose which customers or situations to prioritise?

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Show me the money

There are many complexities to financial services, including our own individual personal financial management. Lucy Neiland shares some of her experiences on how we can embrace complexity in financial research.

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