

Ipsos MORI Highlights

February 2018

- **Public concern about the NHS rises sharply after press coverage of waiting times.**
- **Global growth sees falling concern about unemployment – but worries about corruption are unchanged (Britain has one of the lowest levels of anxiety about corruption)**
- **Public, MPs and journalists all agree financial sector is a priority in Brexit negotiations**
- **William and Harry now most popular Royals**
- **Scots are as wrong about their society as many countries in new Perils of Perception report**



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WELCOME TO FEBRUARY HIGHLIGHTS

This month public anxiety about the NHS has hit the highest level since 2002. Concern about immigration continues its downward track (it's been falling since 2015 but 66% still want immigration reduced).

Globally, reflecting rising growth rates, concern about unemployment has fallen consistently since 2010, and now matches corruption as a key public concern (which is now level pegging with it) as we explore in our "What Worries the World" study across 27 countries.

In Britain Brexit drags on, like a never-ending election campaign, with both sides seeing little movement – one thing is clear however – in our latest study MPs, the media and public all favour banking and finance being protected, ahead of any other sector.

Politically the two main parties are becalmed, with Labour seemingly unable to take advantage of a government in disarray, something we explore in this issue.

We also have special reports on India and Africa, and also look at happiness, drugs adherence and more. We see how Princes William and Harry are now the most popular Royals (and the perceived importance of the monarchy is at an all time high).

Finally we have our latest Perils of Perception study, this time looking at Scotland, finding that immigration, depression and teenage pregnancy are all massively over-estimated – whereas obesity levels are of course under-estimated.

Meanwhile we are preparing four new international reports this year:

- The Truth about Trust (is it really falling?)
- Ageing and what it means for us all
- Gen Z
- Ipsos Global Trends 2018

For more on any of these – or ideas you want us to explore – please get in touch. Stay warm.



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IPSOS MORI'S FEBRUARY HIGHLIGHTS



POLITICS

- Issues Index January 2018: Public concern about the NHS rises
- Ipsos MORI Issues Index: 2017 in review
- What Scotland gets wrong - the perils of perception
- What are the reputational and regulatory risks for businesses that automate?



EVENTS

- Immigration: national concern or global problem?
- Understanding public sector communications in a post-truth world



SOCIETY

- What worries the world? January 2018
- Prince William and Prince Harry are the nation's most liked Royals
- Decline in trust sparks call to action for Scottish third sector



ECONOMY & BUSINESS

- Transport a block to business say Captains of Industry
- Is there a real threat of a finance sector "Brexodus"?
- How trust and corporate reputation will affect the roll-out of Open Banking



HEALTH

- Drug pricing controversies are here to stay – what do consumers think?
- Adhering to adherence. The no-blame approach
- The future of intelligent things



INTERNATIONAL

- Flair India 2018: Aspiration to action
- African Lions: Who are Africa's rising middle class?



MEDIA, BRANDS & COMMUNICATIONS

- Index Design: The Pursuit of (consumer) happiness
- Brand growth
- Getting brand assets right
- The impact of tech on food shopping habits



OPINION

- Public expectations of the NHS
- No! Jeremy Corbyn

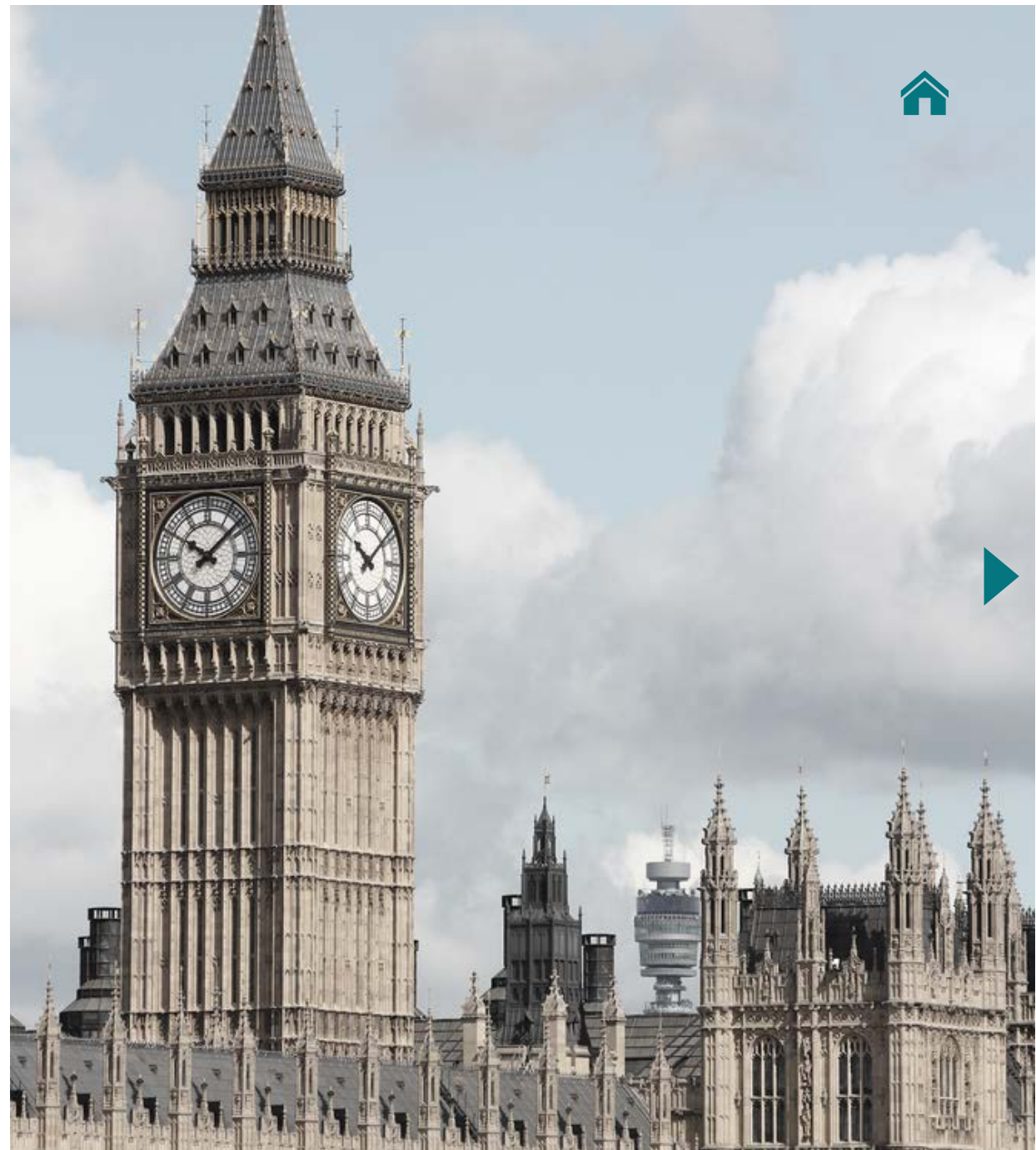


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POLITICS



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PUBLIC CONCERN ABOUT THE NHS RISES SHARPLY



The January 2018 Issues Index records a rise in concern about the NHS.

- Over half (55%) of the British public think the NHS is an important issue for the country, a sharp rise from 45% in December
- Brexit has fallen to second position, but it remains a major concern for just under half of the public (46%) – and remains the single biggest issue
- The importance of the economy has fallen to the lowest level since December 2007 (17%)

The Issues Index records a rise in concern about the NHS – since December 2017 the proportion who consider it to be a big issue facing the country has risen by ten percentage points, to 55%. Apart from a peak of 61% in May last year, this is the highest score since 2002.

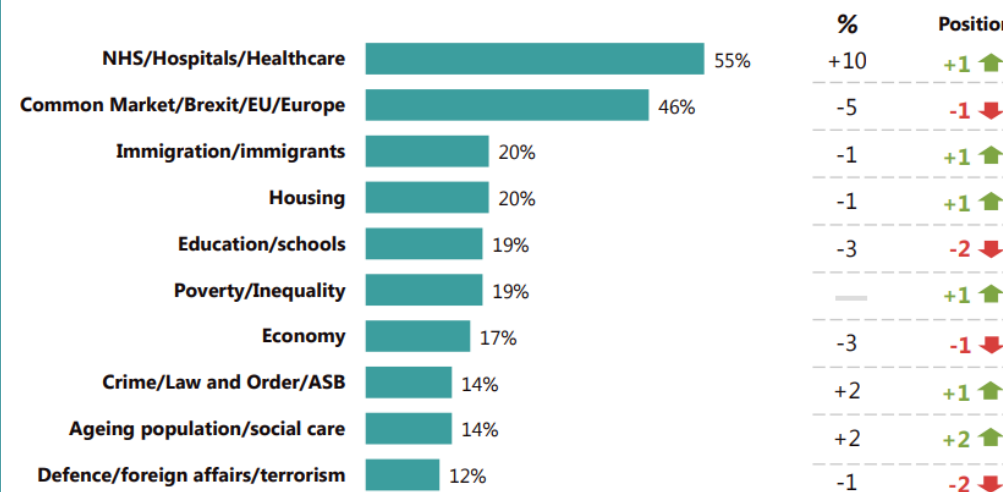
When asked about the single biggest issue facing Britain the order is reversed, with the largest proportion of the public (29%) mentioning Brexit and fewer (18%) saying it is the NHS. However, the gap has closed somewhat this month.

[Read more ...](#)

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

Top mentions %

Change since Aug



Base: 1,010 British adults 18+, 12 – 22 January 2018

IPSOS MORI ISSUES INDEX: 2017 IN REVIEW



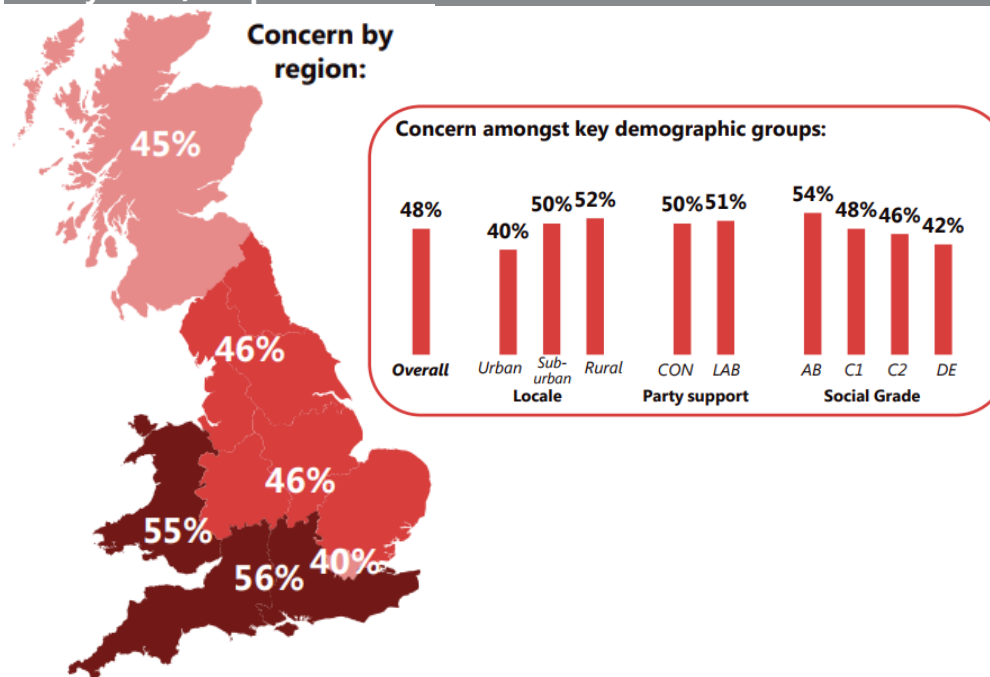
The NHS and Brexit replace immigration as the biggest issues facing Britain in 2017

- Across 2017 the biggest issue facing Britain was the NHS, mentioned by nearly half of the public (48%)
- Concern about Brexit was in very close second place (46%), and was the biggest single issue of the year
- Worry with immigration fell notably; one quarter (26%) of the public mentioned it as an issue in 2017, compared with 40% in 2016

Data shows that the NHS was considered the biggest issue facing Britain across the year. In total close to half (48%) of the British public cited the health service as a worry, an increase of twelve percentage points since 2016. Brexit was in a very close second place on 46%, a rise of sixteen percentage points from the 2016 average. However, Brexit wins out as the single biggest issue of the year, seen as the number one concern by 31% of the public; the figure for the NHS was 14%.

[Read more ...](#)

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



Base: 11,890 British adults 18+, January – December 2017

WHAT SCOTLAND GETS WRONG - THE PERILS OF PERCEPTION



Ipsos MORI Scotland's new Perils of Perception survey highlights how large the gap is between people's perceptions of some key issues and features of Scotland's population and the reality.

We get some things very wrong in Scotland:

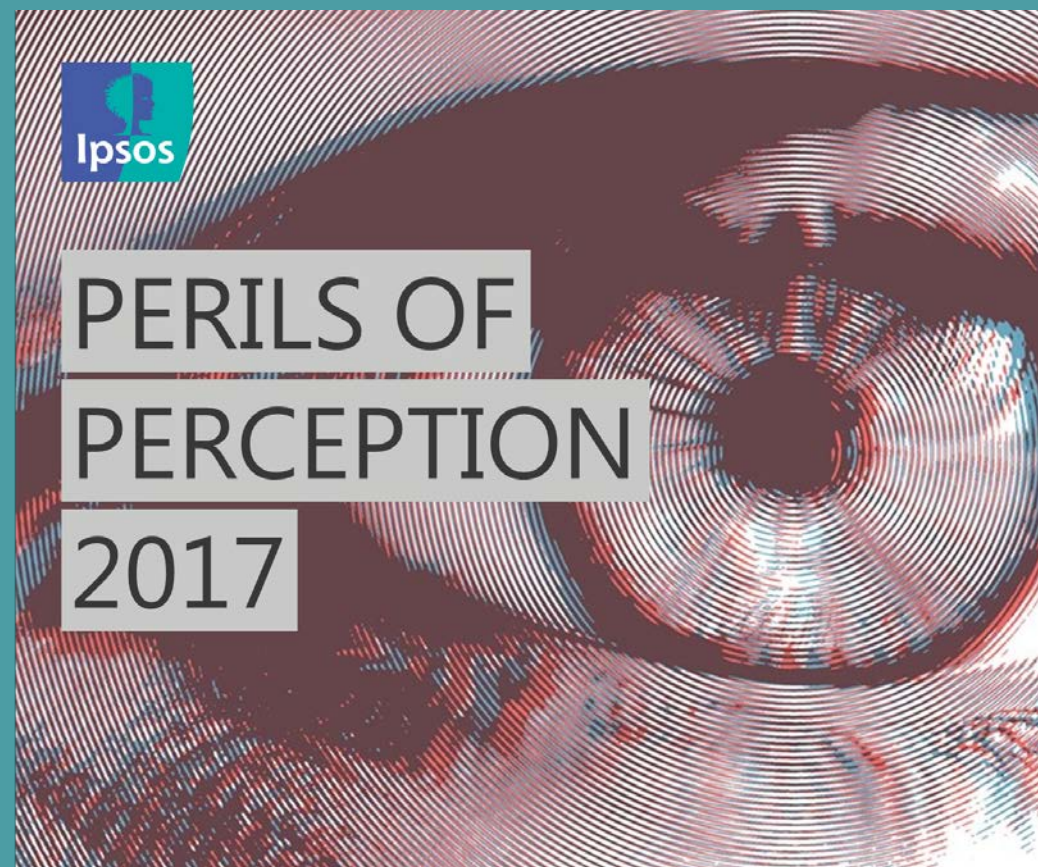
Teenage pregnancy - we think eight times as many women and girls aged 19 or under get pregnant each year as actually do. The Scottish public's average estimate is 24% (almost a quarter) when the actual figure is only 3.2%.

Immigration – we think that immigrants make up a much greater proportion of the population than they actually do. The Scottish public's average estimate is that 25% of people living in Scotland were born outside the UK, but the actual figure is 7%.

Obesity – we significantly underestimate how many of us are overweight or obese. We think it's 46 people out of every 100 (less than half), when the actual figure is 65 people out of every 100 (two thirds).

Mental health – we think that twice as many adults in Scotland have one or more symptoms of depression than actually do. On average we estimate that 41 in every 100 people aged 16 or over in Scotland have one or more symptoms of depression, but the actual figure is 19.

[Read more ...](#)



WHAT ARE THE REPUTATIONAL AND REGULATORY RISKS FOR BUSINESSES THAT AUTOMATE?



Evidence from our Key Influencer and General Public surveys shows that MPs and their constituents are at odds over automation — with diverging views on the desirability of 'minimum human quotas' or an 'automation tax'.

The Fourth Industrial Revolution is well underway. Automating work – replacing human workers with robots, machine learning algorithms, and artificial intelligence – is a phenomenon currently sweeping through every industry in the world, and is transforming the global economy and labour market.

Debate rages over the impact of automation, with various studies suggesting that the proportion of jobs that could be lost in the OECD ranges from 9% to 57%. In the UK, PwC estimate that three-in-ten (30%) jobs are at high risk of being automated out of existence by the early 2030s. The Bank of England has put that figure at 35%. A landmark MIT study found that automation in the US between 1993 and 2007 had no positive impact on employment, leading only to job losses, and although The IPPR Commission on Economic Justice argues that automation will not lead to job losses, it also believes that automation will transform work and – without careful management – will have an outsized negative impact on the poorest.

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EVENTS



IMMIGRATION: NATIONAL CONCERN OR GLOBAL PROBLEM?



Immigration is one of the defining issues of our time. It is frequently cited as one of the most important concerns in many countries around the world but that does not mean that public opinion is the same across the world. Join us on 15 March

In this event, Ipsos country experts from around the globe will be joined by specialists in the field to discuss the similarities and differences in public perceptions towards immigration and how policy makers are responding to public concerns. The evening will close with a Q&A with the audience.

Panel:

- Bobby Duffy, Chair
- Kully Kaur-Ballagan, Ipsos MORI Research Director, author of *Shifting Ground: Views on Immigration*
- Sarah Cutler, Programme Director for Migration at Global Dialogue
- Darrell Bricker, Canada's leading pollster and author of bestseller *The Big Shift: The Seismic Change in Canadian Politics, Business and Culture*
- David Ahlin, Public opinion expert for Ipsos Sweden
- Mari Harris, Director Public Affairs, Ipsos South Africa

[Register here ...](#)



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UNDERSTANDING PUBLIC SECTOR COMMUNICATIONS IN A POST-TRUTH WORLD



Join us on 14 March in Central London to discuss whether political events and technology have changed the way we communicate and receive messages.

Join us for a major debate on the future of public sector communications in a post-truth world. **Alex Aiken**, Director of UK Government communications, will be joined by Ipsos experts from around the globe who will draw on findings from our latest global study on trust, campaign performance and 'fake news'. Experts on the panel will also examine how the UK compares to other countries in changing attitudes and behaviours across a range of policy issues, including public health, pensions, security and the environment.

We will debate the current challenges facing public communication campaigns, covering issues of trust and authenticity, and how best to generate impact. The evening will close with a Q&A with the panel and audience.

- **Ben Page**, Chair
- **Alex Aiken**, Executive Director of Communications, UK Government
- **Julia Clark**, Senior Vice President, Ipsos US
- **Kirsty McNeill**, Policy, Advocacy & Campaigns Director, Save the Children
- **Ashley Ames**, Head of Public Sector Communications, Ipsos MORI

[Register here ...](#)

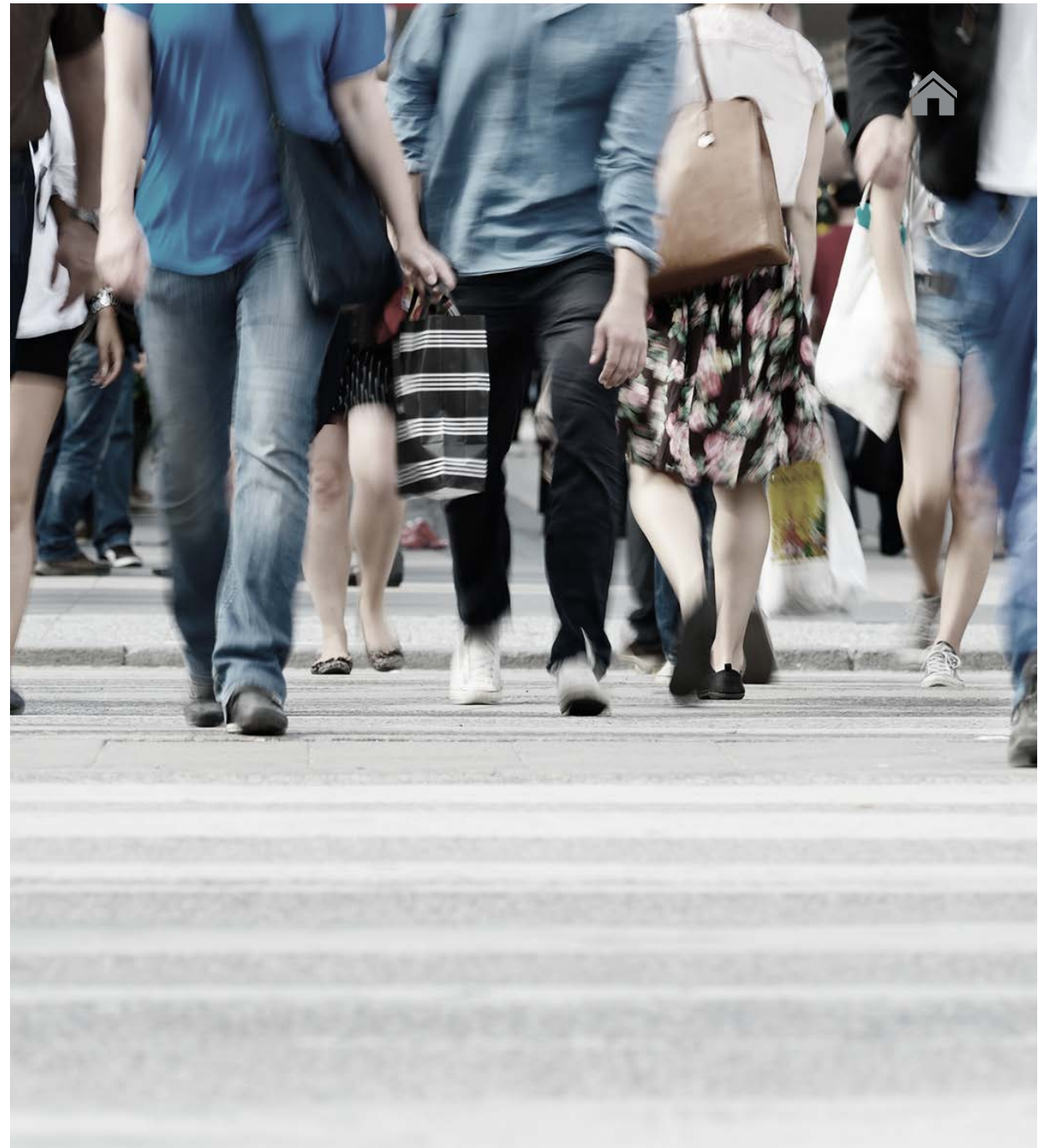


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SOCIETY



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WHAT WORRIES THE WORLD? JANUARY 2018



Our global poll finds unemployment remains the main concern around the world — but in Britain, healthcare leads as the biggest worry. Two-thirds of Britons (65%) think the direction of the country is on the wrong track.

Most people across the participating 27 nations believe their country is on the wrong track — Brazil (83%), Mexico (82%), Italy (82%) and Hungary (76%) being the most anxious of nations. South Africa 27% (up 17 points) and Canada 57% (up 7 percentage points) have seen the biggest increases in optimism.

In Britain, slightly more than average think the country is on the wrong track (65%) but this is a reduction of five points since December.

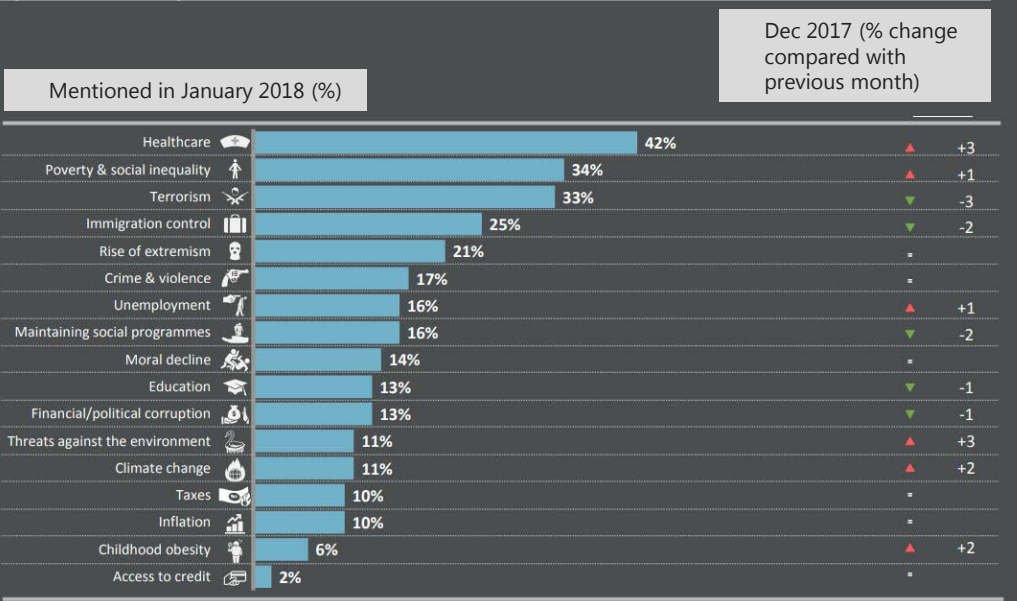
Once again, China and India remain as the countries most positive about their nation’s direction — 92% of Chinese people surveyed believe their country is going in the right direction as do 72% in India.

At the other end of the spectrum Brazilians, Mexicans and Italians are the most concerned about the direction taken by their country.

The three major worries for global citizens are: Unemployment (35%), financial/political corruption (34%) and poverty/social inequality (34%).

[Read more ...](#)

Which three of the following topics do you find the most worrying in your country?



Base: Representative sample of adults aged 16-64. January 2018: 20,202; December 2017: 19,463

PRINCE WILLIAM AND PRINCE HARRY ARE THE NATION'S MOST LIKED ROYALS



Prince William and Prince Harry are named by most Britons as the Royals they like the most, according to the latest Political Monitor.

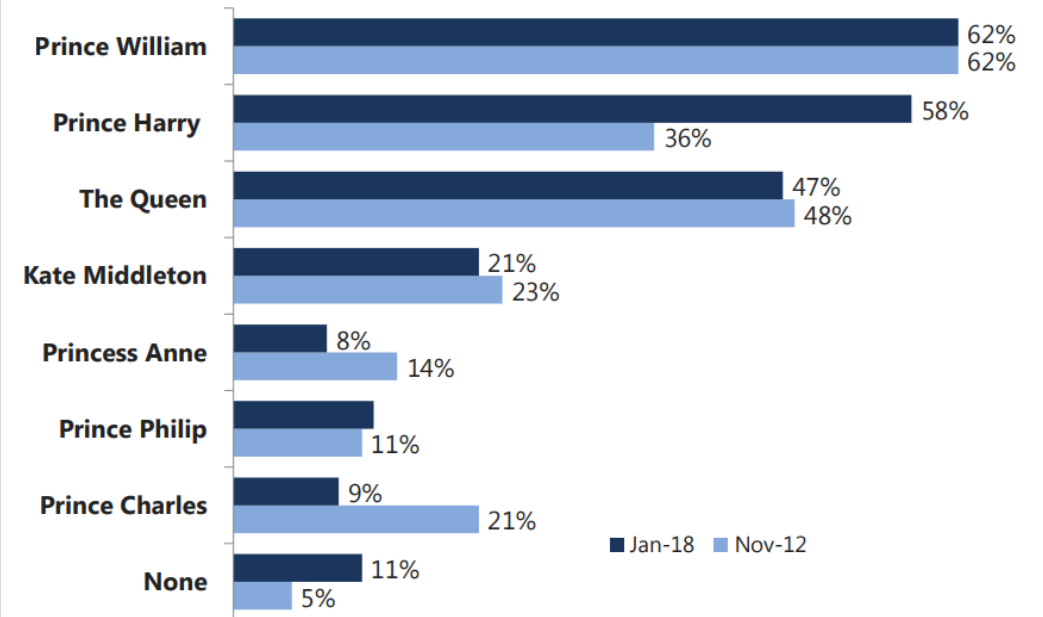
Three in five (62%) listed Prince William among their two or three favourite Royals – the same percentage as in November 2012, when this topic was last polled. Prince Harry's popularity has increased the most, climbing from 36% in 2012 to 58% this month, just below that of his elder brother. The Queen also remains popular: half (47%) named her among their favourites, no change from the 48% in November 2012.

Women are particularly likely to name Prince William or the Duchess of Cambridge as one of their most liked members of the Royal Family. Seven in ten (69%) women participants mentioned William as one of their two or three favourite Royals, and 28% the Duchess of Cambridge, compared with 54% and 13% respectively among men.

Age is also a factor when determining which Royals are the public's favourites. More than half (56%) of those aged 55+ name the Queen, compared with 36% of those aged 18-34.

[Read more ...](#)

Which two or three members of the royal family do you like the most?



Base: 1,031 British adults 18+ 19th January – 23rd January 2018. Showing answers of 5% or more

DECLINE IN TRUST SPARKS CALL TO ACTION FOR SCOTTISH THIRD SECTOR



In December 2017 we conducted a survey of the Scottish public on behalf of the Scottish Council for Voluntary Organisations (SCVO), focusing on trust in charities.

Scottish Council for Voluntary Organisations said:

73% of the 1,088 Scots questioned strongly or tended to agree that 'most charities are trustworthy and act in the public interest' - a drop from 82% in 2015. However, the rate of trust recorded in Scotland is still substantially higher when compared to England and Wales.

Personal experience was a key indicator of trust in charities. When asked about the charities whose services they had used, respondents were more positive. A total of 77% of those questioned rated their trust and confidence as six or above out of 10 for charities whose services they had used and 59% gave high scores of eight and above.

The survey also showed the effect that negative media coverage can have on charities. More than a third of those questioned (38%) said that recent stories had made them lose confidence in charities, compared to 21% who said recent personal experiences had made them lose confidence.

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ECONOMY & BUSINESS



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TRANSPORT A BLOCK TO BUSINESS SAY CAPTAINS OF INDUSTRY



Three-quarters of Captains of Industry agree that their company would have more opportunities to improve if the transport network was better.

79% of Captains say their company has been caused difficulties by Britain's transport network. A similarly high proportion, 74%, say that their company would have more opportunities to improve if the transport network was better.

98% agree that Britain needs to improve its transport network to compete with businesses across the world, 62% doing so strongly.

The findings come from the annual survey of FTSE 500 business leaders and chime with those from Ipsos MORI's Global Infrastructure Index also undertaken in 2017 across 28 countries including Britain. This showed rail infrastructure – new tracks and stations – as a key priority for the public, moving from third to top spot between 2016-17 among a list of ten possible sectors for investment.

The survey, undertaken before the collapse of Carillion, also repeated a question put to the general public last year, asking Captains to rank six factors in terms of their importance as considerations when putting together plans for infrastructure in the future.

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IS THERE A REAL THREAT OF A FINANCE SECTOR “BREXODUS”?



Will the Banking & Finance Sector exit Britain post-Brexit, and what would be the consequences?

Ipsos MORI's latest research among MPs, Business Journalists and the General Public provides warning signals in terms of perceived likelihood of the financial sector moving from the UK to the EU, and highlights the serious consequences for any banks relocating abroad.

As the government begins to focus on Phase 2 of the turbulent Brexit negotiations, one of the key questions is whether the finance sector will be afforded unique access to the EU. In this regard, City stakeholders will be buoyed by findings showing that the majority of MPs and Business Journalists hope that this will be case (57% of MPs say it should be prioritised and 81% of Business Journalists).

The priority treatment afforded to the sector aligns with its perceived importance to the health of the wider economy.

[Read more ...](#)



HOW TRUST AND CORPORATE REPUTATION WILL AFFECT THE ROLL-OUT OF OPEN BANKING



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.

The challenges for the providers of Open Banking services are two-fold. The first is that people are not informed about what Open Banking is and what it will entail; of key opinion formers - often the most informed of audiences - only 7% of MPs and 4% of business journalists feel well informed about Open Banking (*Ipsos MORI MPs and Business Journalist research, Summer 2017.)

Consumers are also worried about their personal data in Open Banking; 66% of people would be concerned about how their data would be used and 59% about the level of protection they would receive.

Therefore, the two major challenges service providers face are creating awareness of the value Open Banking can bring and cultivating trust about the security of new offerings in this space.

[Read more ...](#)



HEALTH



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DRUG PRICING CONTROVERSIES ARE HERE TO STAY – WHAT DO CONSUMERS THINK?



Drug pricing has long been a key reputational issue for the pharmaceutical industry in the eyes of consumers. In light of recent media coverage of this issue, it is unlikely that perceptions are going to shift any time soon.

However, many senior stakeholder groups are positive about the future of pharmaceuticals.

Key trends identified by our research are:

- Scrutiny concerning drug pricing continues; consumers identify drug pricing as the main challenge facing the pharmaceutical industry.
- Investment in R&D has potential as a response to drug pricing criticism, especially as most consumers are undecided or neutral towards individual pharmaceutical companies.
- Senior stakeholders, such as MPs and business journalists view the pharmaceutical industry favourably and identify it as a sector with high growth potential.
- Understanding the views and opinions of senior stakeholders and consumers is key to building trust and reputation strength and securing license to operate.

[Read more ...](#)



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ADHERING TO ADHERENCE. THE NO-BLAME APPROACH



Adherence is one the biggest challenges facing healthcare today and burdens a system already buckling under many other pressures.

Non-adherence has historically been blamed on the patients themselves. However, a broad industry shift towards patient-centricity and a greater appreciation of the behavioural barriers means that the focus of responsibility is shifting to healthcare practioners, the government and pharmaceutical companies.

Patients' automatic decision-making processes exert a strong influence on behaviour and therefore understanding the personal and situational barriers in the use of medication is crucial to combat the adherence problem effectively.

Our paper provides a framework for thinking about adherence through patient behaviour, looking at four categories: motivation, ability, physical context and social context. These are overlaid with the three stages of adherence to give a holistic understanding of the problem at hand.

With this framework, we can begin to create bespoke interventions which speak to individuals, allowing a patient-centric and more informed approach to tackling the adherence challenge.

[Read more ...](#)



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THE FUTURE OF INTELLIGENT THINGS



How connected health is disrupting the world of MedTech.

There is little doubt that connected health may offer the answer to alleviating financial pressures on healthcare systems and improving patient outcomes, but how exactly can this be achieved? What concerns and barriers need to be considered and who exactly is leading the future of healthcare?

This new paper explores:

- **The land of data protection and cybersecurity:** one of the greatest concerns to proponents of connected health and sceptics alike are the security measures put in place to guard patient information.
- **The importance of user experience:** devices and services in the healthcare industry must be user friendly, intuitive and designed to be accessible to all ages, socio-economic groups, literacy levels and cultures.
- **The future success of connected health relies on transparency, education and advocacy:** these are key in order to gain buy-in from the more sceptical healthcare providers.

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INTERNATIONAL



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FLAIR INDIA 2018: ASPIRATION TO ACTION



The first publication from India in our Ipsos Flair series investigates society, consumer behaviour and market trends in the world's second most populous country.

Key points include:

- **India is one of the largest markets in the world:** By 2030, India will have more than 70 cities with over 1 million inhabitants.
- **India has massively adopted mobile technologies:** It has the world's second-largest mobile phone user base (1 billion, with 0.5 billion internet users).
- **India is empowering women:** The female literacy rate has jumped from 54% to 65% in the last decade, and women are increasingly being hired in well-paid positions.
- **India wants to be healthier:** There is great pressure on eating habits and staying fit and healthy. Yet, notoriously unhealthy products usually perform far better than the ones with the strongest health claims.
- Flair India is available as a full report or, for a shorter read, you can download the 10 key points. Via the link below.

10 key points ...

Read more ...



AFRICAN LIONS: WHO ARE AFRICA'S RISING MIDDLE CLASS?



The African middle class are thriving, and with that brings new opportunities. But who exactly are the African middle class? And how can we understand more about them?

The report features:

- Defining the African middle class
- Challenging assumptions
- Understanding the African shopper and the power of brands
- Considerations for marketers
- Looking to the future

Challenges for the African middle class include unpredictable earnings (three-quarters say their income changes month-by-month) and poor city infrastructure resulting in a lack of basic amenities in the home (only 42% have running water, for example). However, despite the continual challenges, there is a sense of optimism and hope due to the entrepreneurial spirit, growing urbanisation and young population. Two-thirds of the African middle class are younger than 35, a demographic dividend signifying an overwhelmingly positive forecast for marketers in terms of spending power growth.

[Read more ...](#)



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MEDIA BRANDS & COMMUNIATIONS



INDEX DESIGN: THE PURSUIT OF (CONSUMER) HAPPINESS



Our latest thought piece, Index Design: The Pursuit of (Consumer) Happiness, investigates how index design can allow you to better understand the KPIs that matter to your business.

The age-old question of 'are my customers happy with my product?' is a difficult one to answer. Satisfaction is subjective and means something different to everyone depending on: how much they interact with your service, their experience of the product, and the quality of their interactions with your customer service team. However, in the age of Big Data and with Data Science we can now provide an accurate and robust measure of overall happiness.

Our latest thought piece, Index Design: The Pursuit of (Consumer) Happiness, investigates how index design can allow you to better understand the KPIs that matter to your business. This data science technique generates robust customer insights that enable you to drive loyalty amongst satisfied users and make tangible improvements for those who are dissatisfied. Ultimately, reducing costs, increasing ROI, and delivering that elusive consumer happiness.

[Read more ...](#)



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BRAND GROWTH



More people, more often, or both? This thought piece investigates the contribution of existing customers to brand growth. Understanding and explaining how brands grow is top of mind in the industry. For decades, Ipsos has been helping our clients answer the question, “How do I grow my brand?”

At Ipsos we believe that brand growth comes from having more people buying your brand, more often, and more easily:

- ‘More people’ is primarily about brand penetration.
- ‘More often’ relates to the level and/or share of spend that you get from your existing customers.
- ‘More easily’ is about accessibility – the more people perceive that they can easily obtain one option vs. another similar option, the more likely it is to be selected.

Presenting our research findings into the importance of ‘more people’ versus ‘more often’, this thought piece explores the purchase behaviour of consumers across 200+ brands over a 12-month period.

[Read more ...](#)



GETTING BRAND ASSETS RIGHT



This paper offers tips on how to leverage your distinctive brand identity in order to grow your brand.

Brands exist in an ever-changing, dynamic environment where disruptive competition and blending categories have become the norm. To stay alive and flourish, brands need to stand out and make a long-lasting impression on consumers. Marketers need to identify the distinctive assets that give their brand a unique and ownable identity.

In this paper we demonstrate our newly developed approach to help clients prioritise a set of unique brand assets that strengthen the brand and which can then be reinforced through communication, packaging, etc.

The first step is to define brand distinctiveness through brand linkage, brand uniqueness, sentiment and brand alignment. The second step is to diagnose the potential strength of each asset.

Managing your distinctive assets is a very important element in building strong brands.

[Read more ...](#)



THE IMPACT OF TECH ON FOOD SHOPPING HABITS



Smartphones are the game-changing technology having a profound impact on our lives – how we think, work and, not least, shop.

According to the latest Ipsos Global Trends survey, we interact with our smartphones 220 times a day. In addition, one third of the world's population (over 2.5 billion) now uses a messaging platform to communicate with one another. One of the appealing things about these messaging platforms, or 'chat' as they have become known, is that they are a real-time channel that can operate at scale and that fits in with today's 'now' society.

Real-time communication by mobile has been a major factor in changing our attitudes and behaviour in the way we shop. And chat isn't the only new communication tool available to retailers; voice-activated virtual assistants such as Amazon's Alexa, Apple's Siri and Google Assistant are also attracting interest from consumers.

This paper investigates the impact of these new technologies on grocery retailing, and explores how they are opening up new channels of communication between retailers (or brands) and their customers.

[Read more ...](#)



OPINION



IPSOS MORI OPINION



Public expectations of the NHS

In a guest blog for The King's Fund, Bobby Duffy explores public expectations of the NHS and other public services.

[Read more ...](#)

No! Jeremy Corbyn

Independent analyst David Cowling looks at the position of the Labour Party in the latest opinion polls.

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All methodological details are available via the
website links



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