

# Ipsos MORI Highlights

## April 2018

- Labour and Conservatives neck and neck but Jeremy Corbyn's personal ratings have fallen – will Windrush and Rudd see them revive?
- Brexit and the NHS are Britons' top concerns, with worry about housing rising
- Three-quarters around the world say their country's society is divided
- 58% believe the country is on the wrong track



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# WELCOME TO APRIL HIGHLIGHTS

Spring has finally sprung – here's our round up of recent releases.

Politically Britain remains split with Labour and the Conservatives neck and neck in voting intention, but below the headline numbers Jeremy Corbyn has seen a decline in his ratings across the board since last September. Theresa May leads on being a capable leader (by 14 points), good in a crisis (18 points), and she leads the field as having what it takes to be a good Prime Minister (44% agree), although a long way below her scores in July 2016. Corbyn is on 31%.

On what worries the world, as growth picks up globally, concern about unemployment is falling - to now match an unchanging level of anxiety about corruption across the countries we measure – with of course dramatic differences between them! In the UK our more parochial concerns centre on Brexit and the NHS – expect to see more money and possibly more taxes to support it announced at its 70<sup>th</sup> Anniversary in June.

The royal marriage on 19<sup>th</sup> May will see the British celebrate another institution they continue to value – and we find that most Britons

wouldn't mind if Harry had chosen to marry a man – a sign of how the country has changed dramatically since the 1970s.

All this plus Alexa and voice activated speakers (8% of us now have one), housing market confidence, cyber security and what businesses need to know, how to build banks' reputation, and much much more.

I hope you enjoy this month's edition – any feedback is always appreciated!



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# IPSOS MORI'S APRIL HIGHLIGHTS



## POLITICS

- Jeremy Corbyn's leader image ratings slip
- Brexit and the NHS top Britons' concerns, with worry about housing rising
- Understanding Society: Putting people in the picture



## SOCIETY

- BBC Global Survey: A world divided?
- Most Britons would have no concerns about a royal same sex marriage
- Most global consumers are intrigued by the idea of self-driving cars
- National Youth Social Action Survey 2017



## INTERNATIONAL

- What worries the world? Globally concern about corruption overtakes unemployment for the first time since



## HOUSING

- Confidence in UK housing market stuck at lowest level in five years



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## ECONOMY & BUSINESS

- Open Banking data sharing dilemmas
- Cyber Security Breaches Survey 2018



## MEDIA, BRANDS & COMMUNICATIONS

- Alexa, Can You Live Up to the Hype? Latest dispatch on voice enabled speakers



## HEALTH

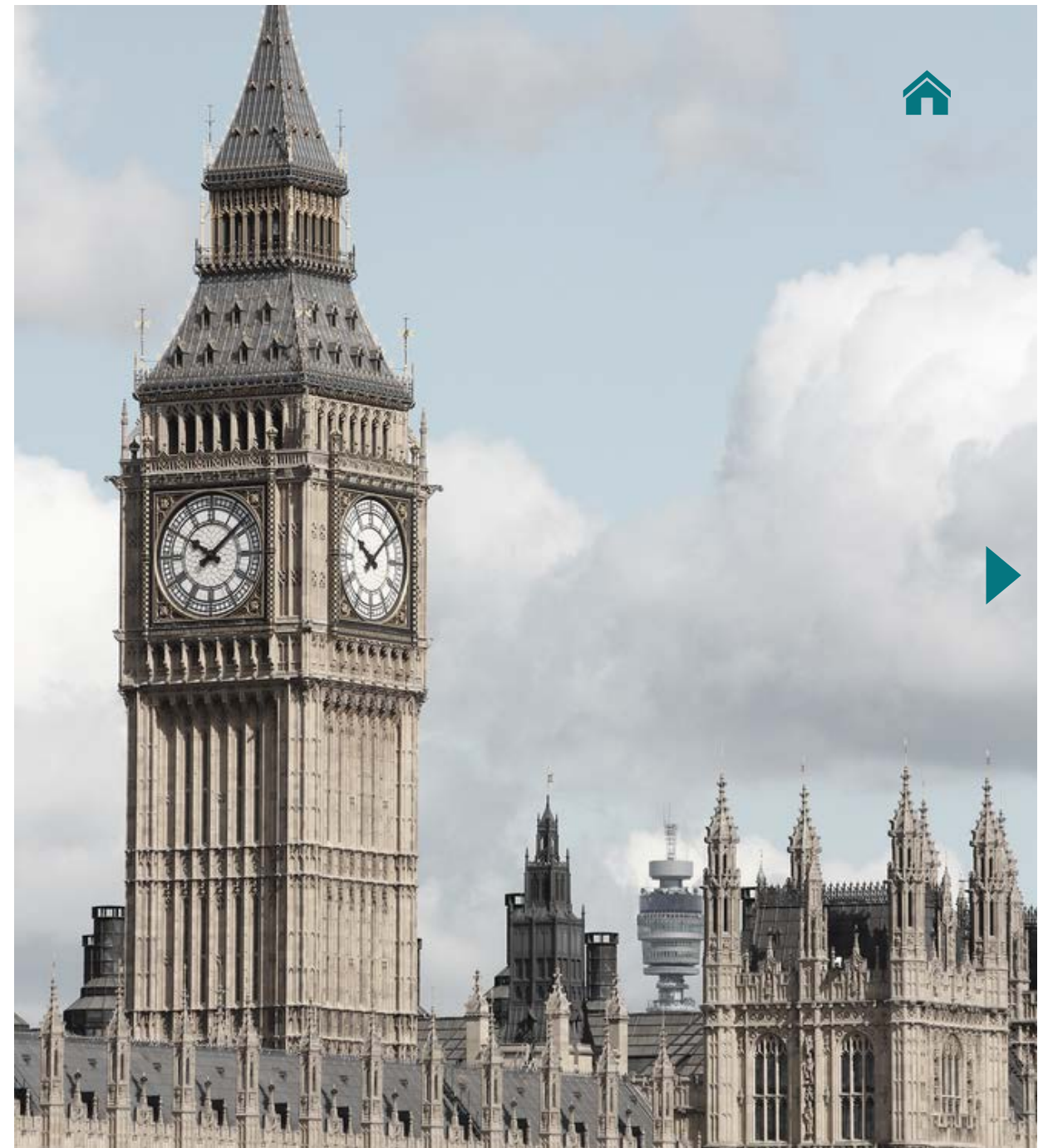
- Pharma's patient-focused missions



## OPINION

- Getting closer to SMEs: a six-step relationship builder for banks

# POLITICS





# JEREMY CORBYN'S LEADER IMAGE RATINGS SLIP

**The April 2018 Political Monitor shows more people have become dissatisfied with Jeremy Corbyn while Ruth Davidson leads other Conservative Cabinet Ministers as Prime Ministerial material.**

## Jeremy Corbyn's leader image ratings slip

### Ruth Davidson leads other Conservative Cabinet Ministers as Prime Ministerial material in eyes of public

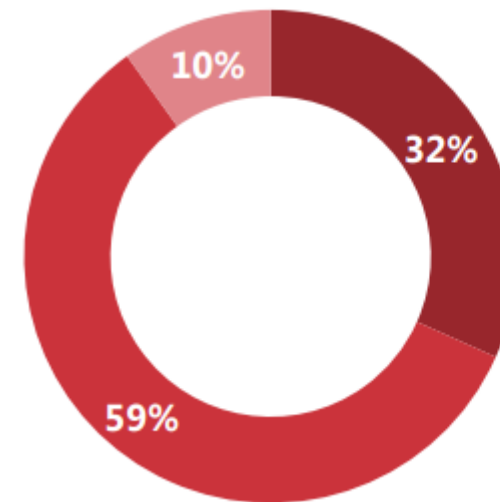
More Britons have become dissatisfied with Jeremy Corbyn according the latest Political Monitor. The poll reveals a third (32%) say they are satisfied with the Labour leader doing his job (down 5 points from March) while three in five (59%) say they are dissatisfied with him (up 7 points) leaving Mr Corbyn with an overall net satisfaction score of -27. This is his lowest score since May 2017.

Theresa May's satisfaction scores have also decreased, but by a more marginal amount. Thirty-eight percent say they are satisfied with the Prime Minister doing her job (down 3 points) and 55% are dissatisfied (up 3 points) – leaving her with a net satisfaction of -17.

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Are you satisfied or dissatisfied with the way Jeremy Corbyn is doing his job as leader of the Labour party?

April 2018



SATISFIED	32%
DISSATISFIED	59%
DON'T KNOW	10%

Net = -27

Base: 1,004 British adults 18+ 20th April – 24th April 2018

# BREXIT AND THE NHS TOP BRITONS' CONCERNS, WITH WORRY ABOUT HOUSING RISING



**The March 2018 Issues Index shows that close to half of the public name Brexit (47%) and the NHS (46%) as big issues facing Britain, while housing is joint-third on 22%.**

- Close to half of the public name Brexit (47%) and the NHS (46%) as big issues facing Britain.
- Housing is the joint-third biggest issue facing Britain, recording its equal-highest score since 1974 (22%).

While concern about both has subsided somewhat since last month, close to half of the public name Brexit (47%) and the NHS (46%) as big issues facing Britain.

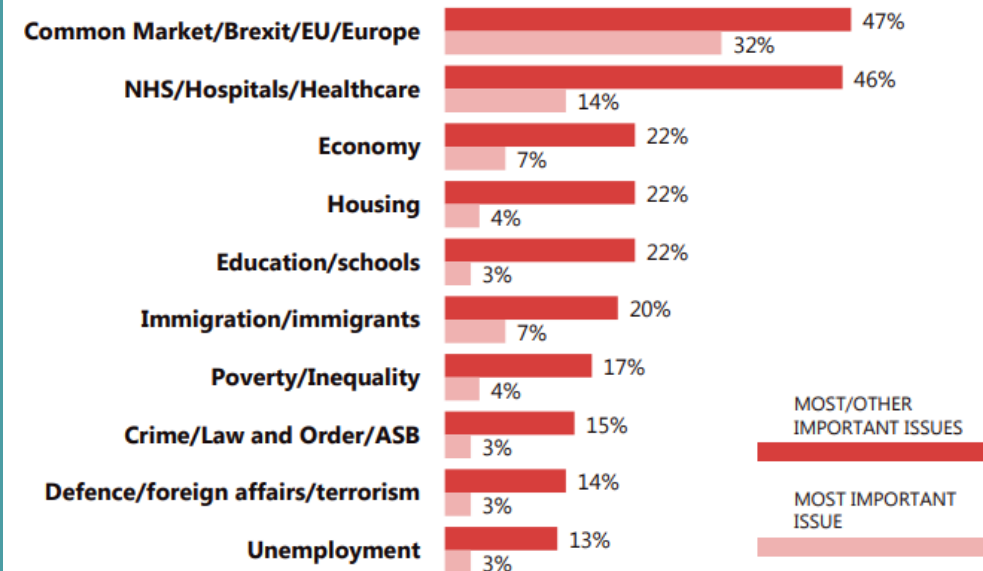
When asked to consider the single biggest issue facing Britain Brexit retains a considerable lead, with a third of the public (32%) citing it as the biggest concern. This is more than twice the proportion who named the NHS as the single biggest issue (14%).

The economy, housing and education are the joint-third biggest issues facing the country, with each named by 22% of the public. This is an historically high score for concern about housing; although 22% also named it as an issue in August 2016, the last time concern about housing was at this level was October 1974, when 27% were concerned.

[Read more ...](#)

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

Top mentions %



Base: 986 British adults 18+, 2 – 21 March 2018



# UNDERSTANDING SOCIETY: PUTTING PEOPLE IN THE PICTURE



**As sustainable development becomes ever more embedded in government and corporate practice, the world of research has increasingly shifted its thinking to economic, social and environmental impacts.**

Welcome to this edition of Understanding Society.

As sustainable development becomes ever more embedded in government and business, the world of research has increasingly shifted its thinking to economic and environmental impacts. A year on from the launch of the [Sustainable Development Research Centre](#), headed by **Jonathan Glennie**, we bring together some of the leading voices in the sector, along with Ipsos experts from all over the globe.

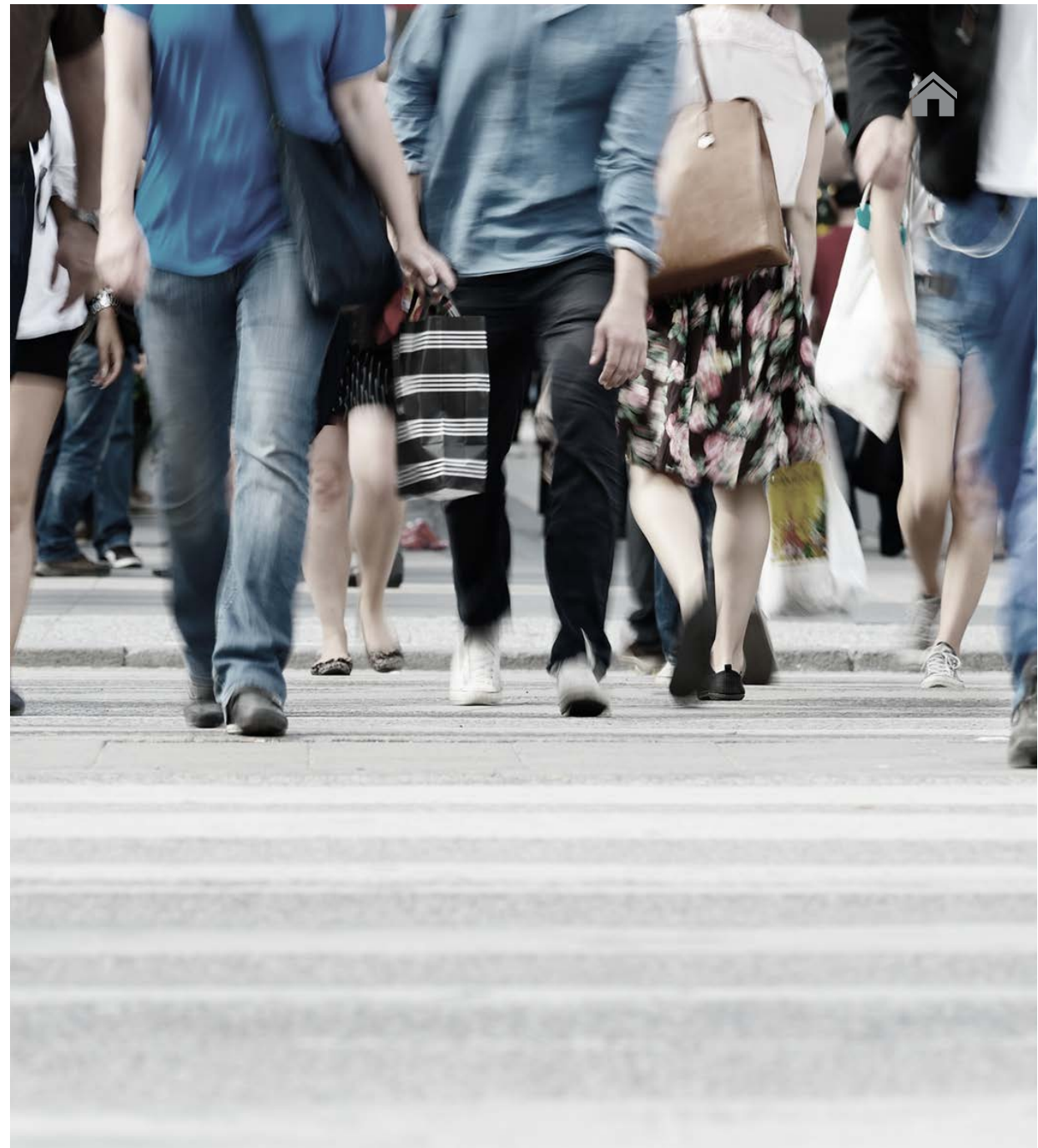
We are delighted to have a key note interview with economist and co-author of the international bestseller Poor Economics, **Professor Abhijit Banerjee**. Banerjee discusses the challenges of translating perceptions to policy and action – as well as the world worries that keep him up at night.

The ideas and actions here reflect a changing world, but the message is an old one. When we put people's own experience and views at the heart of policies and projects, we are much more likely to achieve something that is sustainable.

[Read more ...](#)



# SOCIETY





# BBC GLOBAL SURVEY: A WORLD DIVIDED?



## A global study, highlights the extent to which people think their society is divided, as part of the BBC, Crossing Divides season.

Three-quarters around the world say their country's society is divided – and the majority think their country is now more divided than it was 10 years ago, especially in Europe.

Countries that are most concerned about division are Serbia, where most people (93%) say their society is divided, Argentina (92%), Peru and Chile (both 90%). Those in Saudi Arabia are least likely to say their country is divided (34%) followed by China (48%) and Japan (52%).

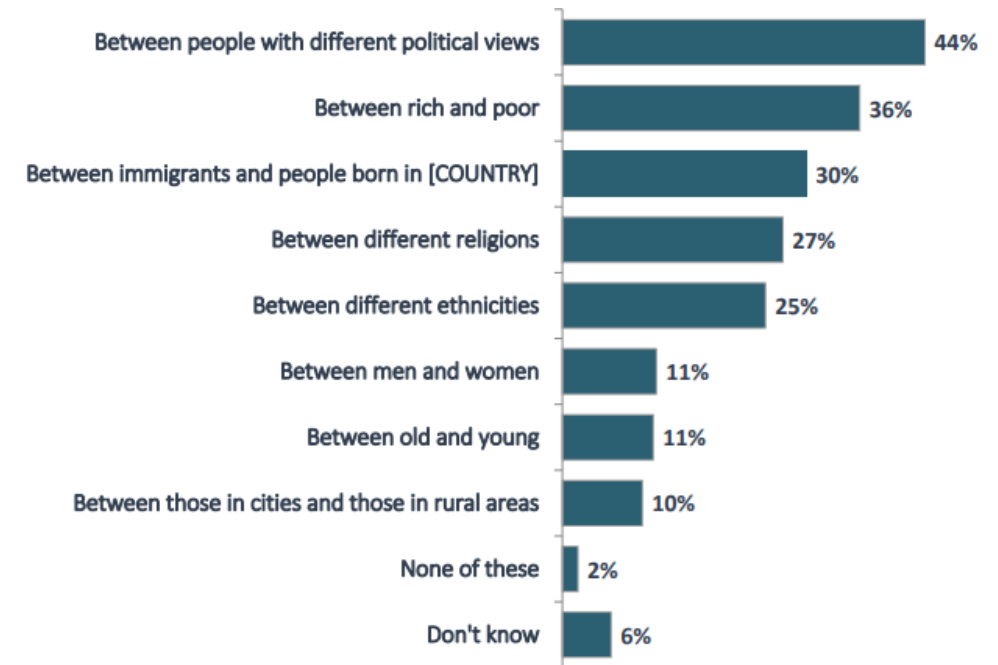
Differences in political views (44%) are seen as the greatest cause of tension, followed by differences between rich and poor (36%).

However, despite these divisions, the majority of people in most countries agree that people across the world have more things in common than things that make them different (65%).

Views are split on whether people are tolerant of people with different backgrounds, cultures or points of view; globally,

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## Between which of the following groups, if any, do you think there is most tension in [COUNTRY] today?



Base: 19,428 online adults aged 16-64 across 27 countries, 26 Jan-9 Feb 2018

# MOST BRITONS WOULD HAVE NO CONCERNS ABOUT A ROYAL SAME-SEX MARRIAGE



**Majority would not be concerned at all by a same-sex marriage in the Royal Family according to new research from King's College London's Polling Club and Ipsos MORI.**

As Prince Harry's marriage to Meghan Markle approaches, few are worried either by the prospect of a member of the Royal Family marrying someone from a different ethnic group or a divorcee. But more people would be very concerned about same-sex marriage in the Royal Family or a Royal child born outside marriage than if it happened among their own family and friends.

A quarter said they would be "very concerned" (15%) or "slightly concerned" (11%) if a member of the Royal Family were to marry somebody of the same sex, but two-thirds (66%) "would not be concerned at all". A significantly lower proportion, 10%, would be "very concerned" if a family member or close friend married somebody of the same sex, while 13% would be slightly concerned.

There is a bigger distinction between attitudes to the Royal Family and everybody else when it comes to having children outside marriage. Although the numbers are small, twice as many would be "very concerned" if an unmarried Royal Family member had a child than if a member of their own family or a close friend did so (7% compared to 3%).

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# MOST GLOBAL CONSUMERS ARE INTRIGUED BY THE IDEA OF SELF-DRIVING CARS



**Participants are most likely to view self-driving cars as making the driving experience more luxurious and comfortable. On the whole, the world seems curious, but hesitant, about the idea of self-driving cars.**

Fifty-eight percent of global participants responded to the poll saying they were unsure, but intrigued by the idea of self-driving cars. Comparatively, just 13% said they would never use them and 30% are excited to use the cars and can't wait to do so. Indian (49%), Malaysian (48%), and Chinese (46%) participants were most likely to answer that they are excited to use self-driving cars. Meanwhile, German (31%), French (25%), American (24%), English (24%), and Canadian (24%) participants were most likely to answer that they would never use a self-driving car.

Global participants saw many uses for self-driving cars in cutting down on mundane driving activities. When asked how often they would use self-driving car features for various driving activities, the top responses were parking (58%), commuting (53%), and driving on the highway (53%). The greatest perceived benefits to self-driving cars were all related to making driving a more luxurious experience. The world's participants believe self-driving cars will make driving easier (69%), more comfortable (68%), and more relaxing (64%).

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# NATIONAL YOUTH SOCIAL ACTION SURVEY 2017



**This campaign, launched in 2013, aims to close the socioeconomic gap in social action participation amongst 10 to 20 year olds whilst increasing overall participation from 40% to 60% by 2020.**

The appetite for social action remains strong: The majority of young people (58%) have taken part in some form of social action over the last 12 months, and 68% say they are likely to take part in the future. There continues to be a gap in meaningful social action participation between the most and least affluent young people (51% vs 32%).

Participation in meaningful social action brings a wealth of benefits for young people's health and wellbeing, with participation also associated with higher life satisfaction and 81% agreeing it will help their future job chances.

The majority of young people are participating in some form of social action, but of these, 1 in 3 does not experience the double benefit or participate regularly.

Those from less affluent backgrounds cite a lack of interest and understanding as reasons for non-involvement. But a third (31%) would be encouraged to take part in social action if they could do it with their friends.

Education, family and friends affect participation in meaningful social action.

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# INTERNATIONAL



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# WHAT WORRIES THE WORLD? MARCH 2018



**New global poll finds three concerns top the world's worry list: financial/political corruption (35%), unemployment (34%) and poverty/social inequality (34%).**

Our What Worries the World study finds most people across the participating 28 nations believe their country is on the wrong track (58%), with Mexico (89%), Brazil (88%), Spain (81%) and Italy (80%) recording the highest levels of concern.

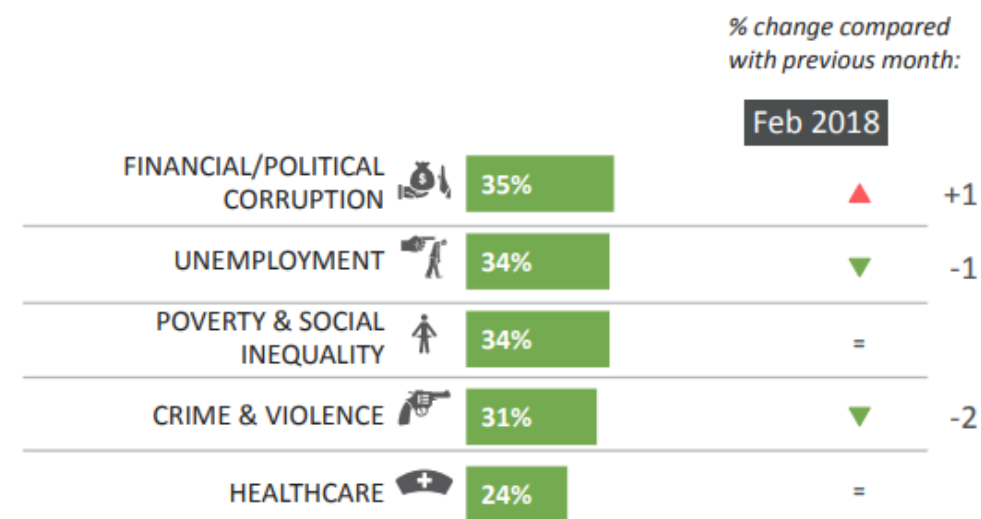
Once again, Chinese people remain the most confident about their nation's direction with 94% believing their country is going in the right direction. At the other end of the spectrum — Mexican, Brazilian and Spanish citizens are the most concerned about the direction taken by their country.

For the fifth consecutive month, healthcare is the main worry for the British public, with 42% citing it as the main concern — despite a seven-point drop from the previous month's peak (49%).

Poverty/social inequality (33%) is the second main concern for Britons —but Britain is ranked 16th for this worry in comparison to the other 27 nations surveyed.

[Read more ...](#)

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



Base: Representative sample of adults aged 16-64 in 28 participating countries. c.18,000 per month



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# HOUSING



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# CONFIDENCE IN UK HOUSING MARKET STUCK AT LOWEST LEVEL IN FIVE YEARS



**The Q1 2018 Halifax Housing Market Confidence Tracker (HMCT) shows only a small improvement on the steep decrease in the House Price Outlook (HPO) found in autumn 2017.**

In October 2017 HPO - consumer sentiment on whether average house prices will be higher or lower in a year's time - was +30, down from +44 in March 2016 and less than half its peak in May 2015.

HPO is now +33. Half expect house prices to rise over the next year, the same as autumn 2017 and remaining at the lowest level since April 2013 (45%). However, fewer people are now negative about the housing market, with 17% predicting a fall in prices over the next year, down from 20% six months ago, with 26% expecting prices to stay flat.

Less than a third of existing mortgage borrowers (29%) are concerned about the possibility of rising interest rates affecting their ability to meet their monthly repayments.

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# ECONOMY & BUSINESS



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# OPEN BANKING DATA SHARING DILEMMAS



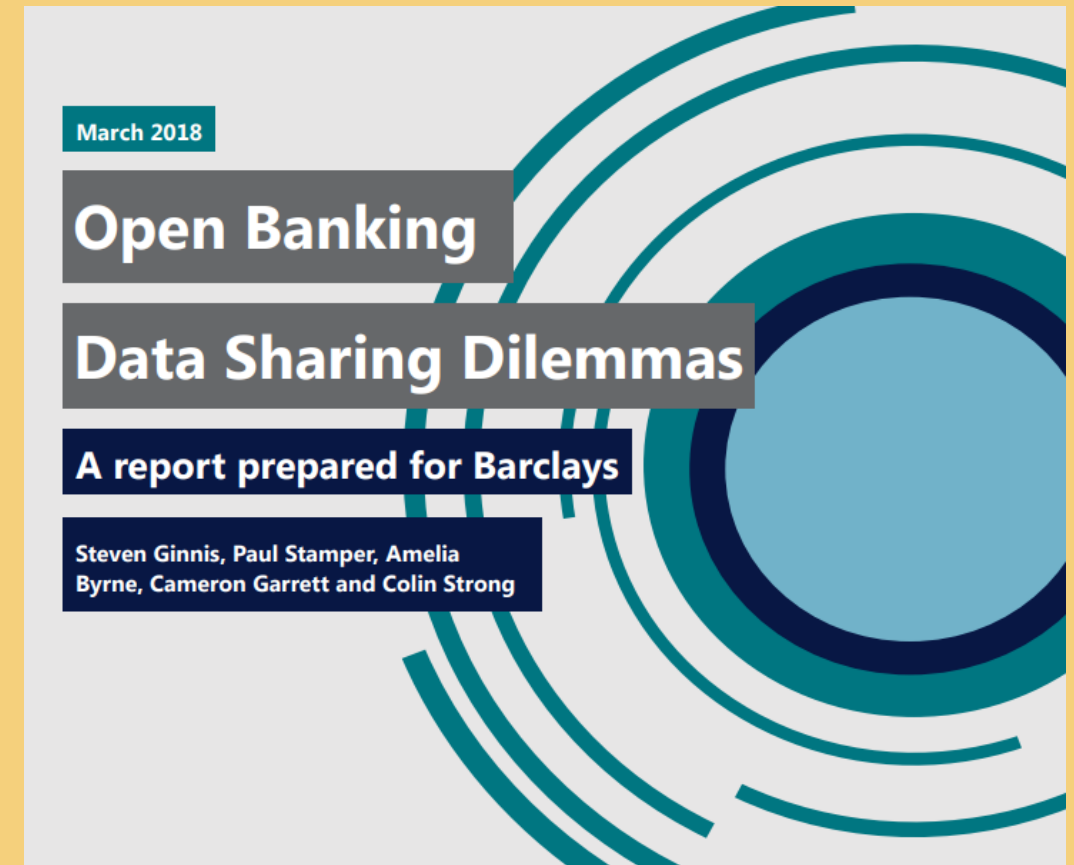
**This report is designed to understand the human side of Open Banking. By exploring the attitudes and emotions of consumers, we can facilitate the design, execution and communication of this important development; and as such help to ensure that it is a success.**

Participants tended to spontaneously associate banking with balances, transactions and personal information. When prompted, they were conscious of the significant insight that could be obtained by accumulating different information over time to infer details about consumer lifestyle, personality and circumstance.

For most participants, this was the first time they had heard of Open Banking. Within this context, participants initially treated the overall concept of Open Banking with caution. Based on a description of the Open Banking proposition, most were primarily concerned about the new levels of access to and the potential use (or misuse) of information that had previously remained private.

There was little movement in overall attitudes to the concept of Open Banking throughout the day-long research process, with participants' underlying attitudes and assumptions (around data sharing, data privacy and financial services providers) remaining paramount in shaping their reactions.

[Read more ...](#)



# CYBER SECURITY BREACHES SURVEY 2018



**The 2018 survey again highlights that virtually all UK organisations covered by the survey are exposed to cyber security risks, with 98% of businesses and 93% of charities relying on some form of digital communication or services, such as staff email addresses and the ability for customers to shop online.**

Charities are exposed to further online risks, with around one in three enabling people to donate online (31%) and allowing beneficiaries to access their services online (27%). As a result, over four in ten businesses (43%) and two in ten charities (19%) suffered a cyber breach or attack in the past 12 months. In this context, three-quarters of UK businesses (73%) and more than half of charities (53%) say that cyber security is a high priority for their senior management.

However, as in previous surveys in 2017 and 2016, a sizable proportion of businesses and charities still do not have basic protections or have not formalised their approaches to cyber security:

- Under three in ten businesses (27%, versus 33% in the previous 2017 survey), and two in ten charities (21%) have a formal cyber security policy or policies.
- Only a third (30%) of businesses and a quarter of charities (24%) have made specific board members responsible for cyber security.

[Read more and view infographics ...](#)



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# MEDIA BRANDS & COMMUNICATIONS



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# ALEXA, CAN YOU LIVE UP TO THE HYPE?



**Like it or not, voice assistants are here to stay and Smart Speakers are one way they are infiltrating our homes..**

But, do we get what we expect when we open the box for the first time? How well does the marketing hype of brand giants like Amazon, Google, and Apple live up to the reality of ownership? Recent results from Ipsos' Tech Tracker indicate there may still be work to do.

Our latest thought piece, Voice Activated Speakers: Alexa, Can You Live Up to the Hype?, investigates how smart speakers are changing the marketing landscape. Voice is increasingly important to marketing strategies and with it the value of understanding how consumers interact with and experience their voice activated speakers. Understanding how users and non-users perceive, experience, and come to own their devices allows you to build a marketing strategy that compliments their needs. Ultimately, building brand recognition, influencing purchase intent, and allowing you to focus your efforts on what the consumer wants.

[Read more ...](#)



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# HEALTH



# PHARMA'S PATIENT-FOCUSED MISSIONS



## **The survey reveals the growing importance of pharma's patient-focused missions and growing confidence in delivering on those missions among patients and pharma**

The overarching insight from the survey is that participants think delivering on pharma's patient-centered missions is important. The survey asked all participants how important it was that pharma, biotech and medical device companies delivered on their patient-focused missions/visions. Nine in ten (91%) participants ranked the importance an 8 or more out of 10. However, participants were also asked to rate their confidence in their company's ability to deliver on those mission/visions and only three in ten (30%) selected 8 or more out of 10.

Themes that emerged from the data include:

- How pharma sees itself, how patients see pharma.
- Patient centricity goes hand in hand with engagement and pride.
- Trust in Pharma.
- The link between patients' needs and business outcomes.
- Training is the missing ingredient to patient-centric execution

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# OPINION



# IPSOS MORI OPINION



## Getting closer to SMEs: a six-step relationship builder for banks

Research Director Georgiana Brown has a six-step guide for banks on how they can build better relationships with SMEs. This article originally appeared in Global Banking and Finance Review Magazine.

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All methodological details are available via the  
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