

# Ipsos MORI Highlights

## May 2018

- **Concern about crime reaches a seven year high in Britain, and becomes top issue in London**
- **The world is more optimistic, with falling anxiety about unemployment, but global concern about corruption remains unchanged**
- **In Britain, most favour tax rises for the NHS, with top priorities for increased spending on A&E and mental health**
- **Global reactions to Karl Marx's legacy on the 200<sup>th</sup> anniversary of his birth show his ideas remain attractive in many countries**
- **Royals make foreigners think Britain is traditional – and powerful**



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# WELCOME TO MAY HIGHLIGHTS

This month sees Britain celebrate a Royal Wedding with gusto, confirming its love of tradition (something we cover in our Global Trends Survey [here](#)), and we have global reactions to the Royals and the image of the UK they foster.

In politics, Theresa May's Conservatives are starting to stretch a small lead over Labour, and we examine the May local elections – no one did particularly well, but Labour would have expected more if they were on certain course for a victory in a general election.

In Britain overall, concern about crime has shot up, becoming the number one issue in London, along with Brexit and the NHS. This month [we look in more detail at the NHS](#), and find clear public support for raised taxes to pay for it, with A&E and mental health as the top priorities. Concern about mental health has doubled in Britain in the last year.

Elsewhere we look at where open banking is now, what the public think 'natural food' really is, and much more, including millennials in Pakistan, and an in-depth look at Indonesian consumers and society.

As you are reading this online, you may be interested in what makes ads most watchable, in our latest analysis, or surprised to know that only 79% of Britons have what the government defines as basic digital skills – not everyone is comfortable online (which is why we still employ 1,000 face to face interviewers to access everyone in the UK).

I hope you enjoy this month's edition – we will keep sending them unless you let us know you want to unsubscribe!

Have a great week.



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



## POLITICS

- Issues Index: Concern about crime reaches a seven year high
- World divided on socialism, 20 years after birth of Karl Marx
- The power of modern partisanship



## INTERNATIONAL

- What worried the world in 2017?
- Royal Wedding 2018: International perceptions of the Royal Family
- Flair Indonesia 2018
- Millennials in Pakistan



## HEALTH

- NHS at 70 - Public attitudes to the health and care system



## SOCIETY

- Liverpool Waves of Hope evaluation: year 3 report
- 'Natural' food: what does it mean?



## ECONOMY & BUSINESS

- Has the Digital Banking revolution finally started? The FinTech landscape in 2018
- Basic Digital Skills UK Report 2018



## MEDIA, BRANDS & COMMUNICATIONS

- Viewability matters

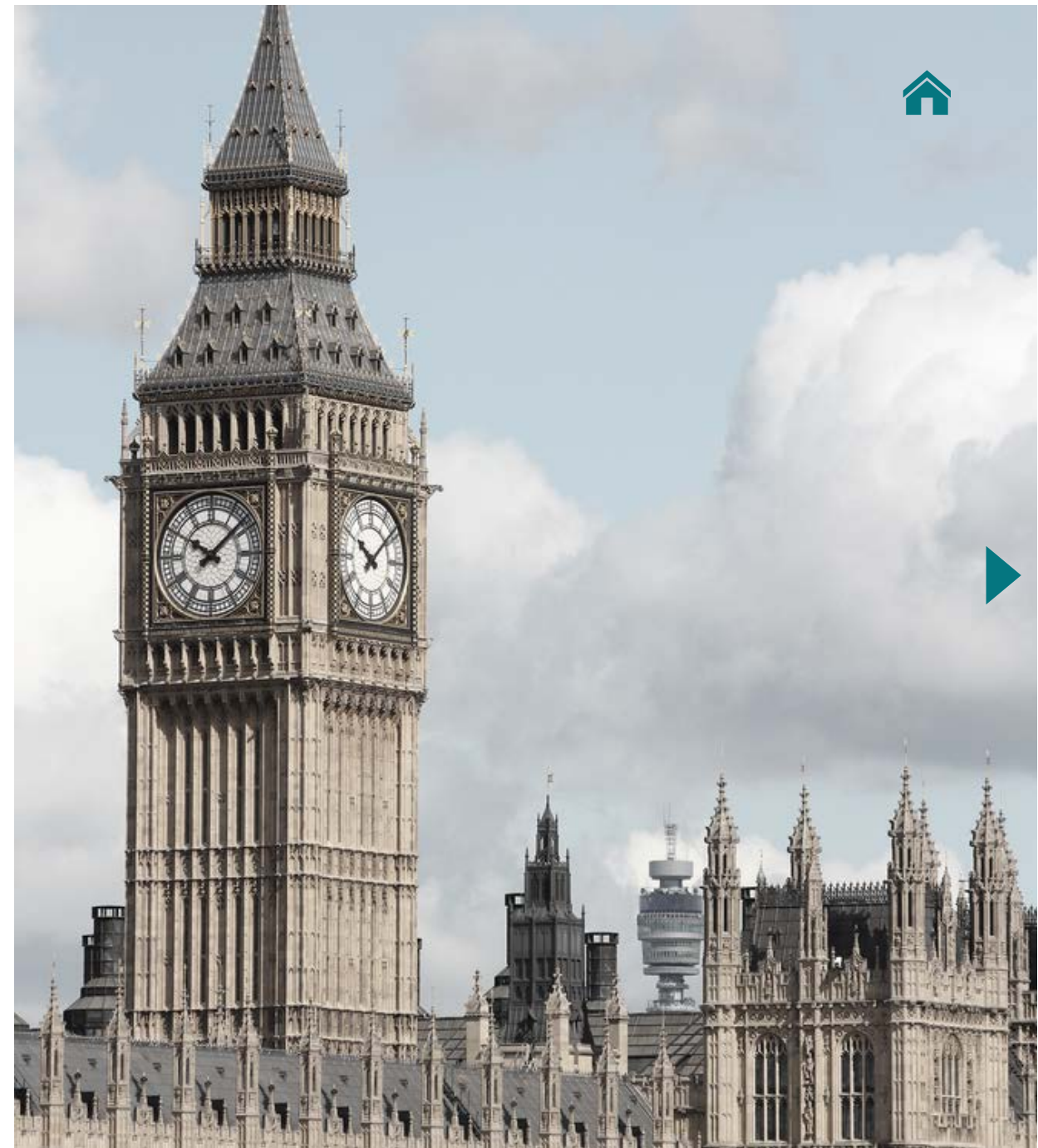


## OPINION

- The Hacker: Why Protecting your Data is More Important than Ever Before
- 2018 local election analysis by David Cowling
- Going beyond continuous listening ...
- Innovation: how behavioural science is helping us improve our understanding of corporate reputations
- Ben Page looks at rising concern about mental health



# POLITICS



# ISSUES INDEX: CONCERN ABOUT CRIME REACHES A SEVEN YEAR HIGH



**Our monthly Issues Index reveals a sharp rise in concern about crime, with 23% of the public citing it as a big issue for the country.**

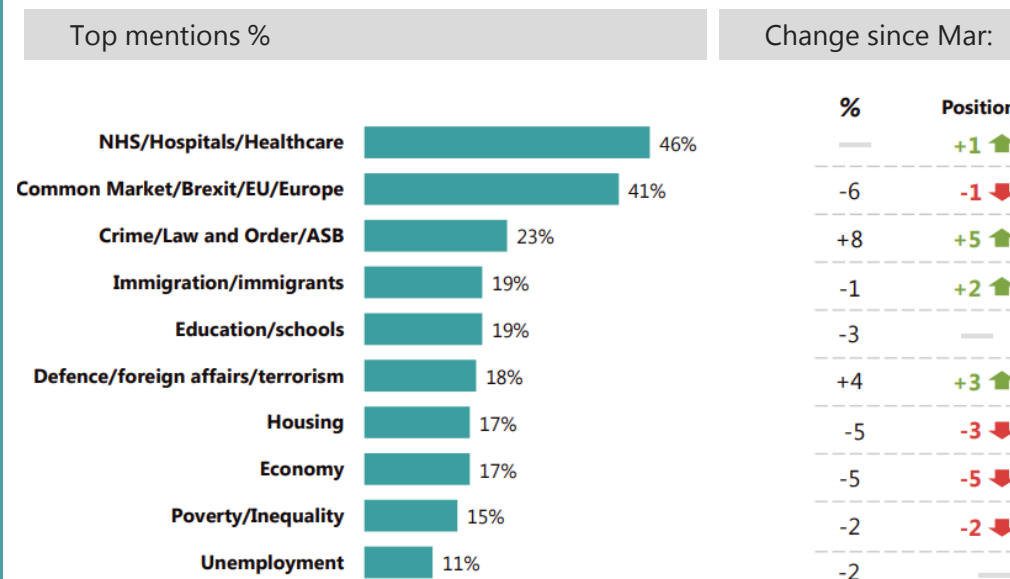
- NHS (46%) and Brexit (41%) retain their position as the biggest issues facing Britain, although concern about Brexit has fallen significantly since March
- Crime rises eight percentage points to 23%, the highest score since November 2011
- Crime is also the top issue in London (36%), alongside Brexit (36%) and the NHS (39%)

Nearly one quarter (23%) of the public name it as a concern, the highest score for this worry since November 2011 and an increase of eight percentage points since last month.

The proportion naming Brexit has fallen by six percentage points since March, although the proportion naming these issues has fallen since February, when both were cited by half of the public. Brexit is still the single biggest issue facing the country however, with twice as many naming it as the NHS (26% to 13%)

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



Base: 1,001 British adults 18+, 6 – 24 April 2018

# WORLD DIVIDED ON SOCIALISM, 200 YEARS AFTER BIRTH OF KARL MARX



**Half of the people around the world think that at present, socialist ideals are of great value for societal progress. Despite this, half of the people also agree that socialism is a system of political oppression, mass surveillance and state terror.**

Globally, eight in ten people think that the rich should be taxed more to support the poor. Around the world nine in ten people believe that education should be free of charge and that free healthcare is a human right.

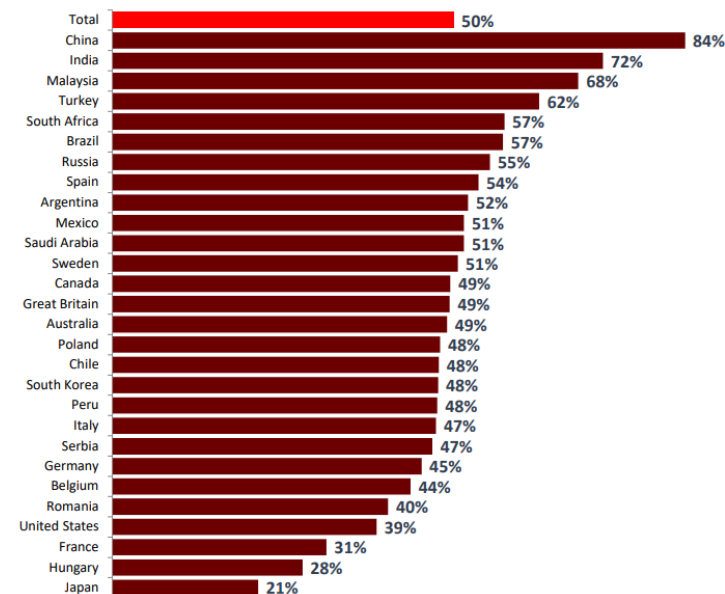
Half (49%) of Britons agree that socialist ideals are of great value for societal progress, but 51% disagree. The survey, carried out online among adults aged under 65, found that on average, the world is split down the middle (50%), but China (84%), India (72%) and Malaysia (62%) are more likely to agree, and Japan (21%), Hungary (28%), France (31%) and the US (39%) least like to agree.

Furthermore, the world is also divided over individual freedom. Half (48%) think that individual freedom is more important than social justice, with India (72%), the US (66%) and South Africa (64%) the most decided. France (64%), China (63%) and Germany (62%) are more likely to disagree.

[Read more ...](#)

**Q. Do you agree or disagree with the following statements: - at present, socialist ideals are of great value for societal progress**

% Strongly/somewhat agree



Base: 20,793 online adults aged 18-65 across 28 countries, 23 March – 06 April 2018

# THE POWER OF MODERN PARTISANSHIP



**This paper, part of the Our Age of Uncertainty series, explores the aligning of social and political identity and its effects.**

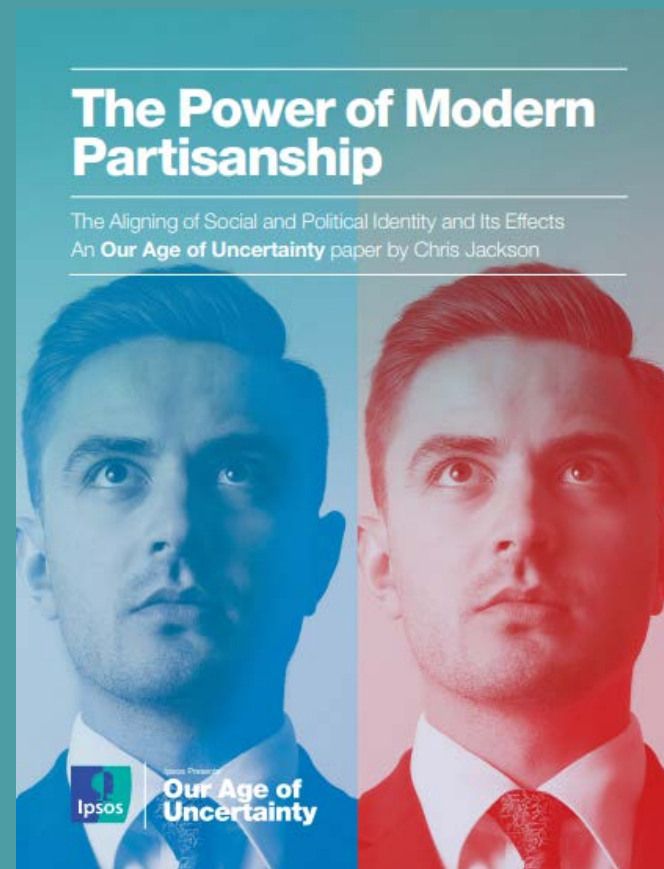
In order to attract people to a broader sense of identity that unifies more than it divides, leaders today must understand where their people currently are and what political team they identify with.

Political partisanship is not a new phenomenon. However, contemporary partisanship has become more corrosive and detrimental to the functioning of society than at any time in recent history.

Partisans are increasingly isolating themselves from people on the other side, curtailing the moderating influence of having to socialise with people with different viewpoints. The strength of negative partisanship is also increasing, making it easier to believe the worst about your political opponent and making it harder to find common ground.

In addition, this paper details how most people who now identify as moderate or independent are opting out of regular political participation, paving the way for more extreme partisan voices to take the field.

[Read more ...](#)



# INTERNATIONAL



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# WHAT WORRIED THE WORLD IN 2017?



**Every month across the year, our What Worries the World survey series has asked an online sample of over 18,000 citizens in 26 core countries about the biggest worries for their nation, presenting them with a list of 17 concerns ranging from crime and violence to childhood obesity.**

- The world has become marginally more optimistic: 40% believe their country is headed in the right direction, up from 37% in 2016.
- Unemployment remains the biggest worry for 2017 overall, but its lead over poverty/inequality and corruption diminished over the year.
- This fall in concern about unemployment has been driven by big drops in worry about job security in established nations including Canada and the US.

This year's report also investigates who is most worried about each of the biggest three concerns in the poll – unemployment, corruption and political scandal, and poverty/inequality.

It finds that worry about unemployment is the most evenly spread across different countries. By contrast, concern about poverty/inequality is more of a concern for citizens in established economies, while corruption and political scandal is a bigger issue for those in emerging economies.

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# ROYAL WEDDING 2018:

## INTERNATIONAL PERCEPTIONS OF THE ROYAL FAMILY



**Which Royal Family members are liked the most according to our Ipsos Global Advisor poll conducted in 28 countries?**

Prince Harry most liked Royal in Great Britain, and he and the Queen are joint most popular worldwide. **Different countries have their different favourites.** The Queen is the most liked in eleven of the 28 countries (including India, China, Saudi Arabia and Brazil), while Prince Harry is the most popular in eight (including Britain with 42%, Australia and South Africa). The Duchess of Cambridge is the most liked in the United States, while her husband is the most popular in France.

The Duke and Duchess of Cambridge also both viewed favourably.

The Royal Family has a net positive impact on Britain's reputation abroad – though half say it makes no difference, and it also reinforces perceptions of Britain as a traditional country.

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# FLAIR INDONESIA 2018



**As part of our Ipsos Flair series, this report reveals the deep dynamism of Indonesia, a country that is booming after decades of sustained economic growth.**

Indonesia is dealing with opposites: GDP per capita ranks 107th in the world, with 100 million Indonesians (out of 260m) living below or on the poverty line. It's a buzzing topic on social networks globally: the four richest men in Indonesia are richer than the 100m poorest.

Indonesia is experiencing the rise of individualism: For an increasing number of Indonesians, life is a competition between individuals. Status and uniqueness are key to success, with Indonesians hungry for new things and relishing constant change.

Indonesia has a dualistic media landscape: TV remains the main media for entertainment, offering dramas, soap, Indian movies, Bollywood, musicals, "The Voice", etc. While TV is the mass media amusing the public, the internet is the place where Indonesians seek and share information, news and views. The campaigns for the election of governors, especially in Jakarta, have exemplified this dichotomy.

[Read more ...](#)



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# MILLENNIALS IN PAKISTAN



**This study sheds new light on Pakistan's millennials - one of the country's most important and disruptive consumer segments.**

More brands are shifting their attention to millennials as they look to gain insights into how future consumers will shape tomorrow's trends.

In this comprehensive study on Pakistan's Generation Y, we discover new trends in attitudes and behaviours across key demographics.

This summary report presents a selection of findings from the study, including:

Almost a quarter of millennials in Pakistan value their country's traditions passed down from older generations. However, almost half of millennials are not afraid to speak their minds, even if their opinions go against societal norms or expectations.

While 58% of Pakistani millennials are optimistic about their future in the country, this varies drastically by gender (45% of women compared to 71% of men).

Almost one third of Pakistani millennials are willing to give brands they have had a bad encounter with another chance – a figure that is significantly higher than in other countries in the region.

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# HEALTH



# NHS AT 70 - PUBLIC ATTITUDES TO THE HEALTH AND CARE SYSTEM



**This year marks the 70<sup>th</sup> anniversary of the NHS, and this poll discusses the public's views towards funding of the NHS, and their priorities when receiving care.**

When asked to consider the NHS over the next few years, 21% say that they expect it will get better, but many more expect it to get worse.

More than two in three (68%) say urgent and emergency care such as A&E and ambulance services should be a priority for additional health and social care funding. Investment in mental health services was the next main priority (58%) for additional spending, followed by community and adult social care services (40%) and children's services (40%).

When asked what is most important to them when receiving non-emergency care, 38% of people reported that receiving the highest quality of care is most important. 21% of people said that short waiting times was most important, and 11% of people said that being treated close to home was most important.

[Read more ...](#)

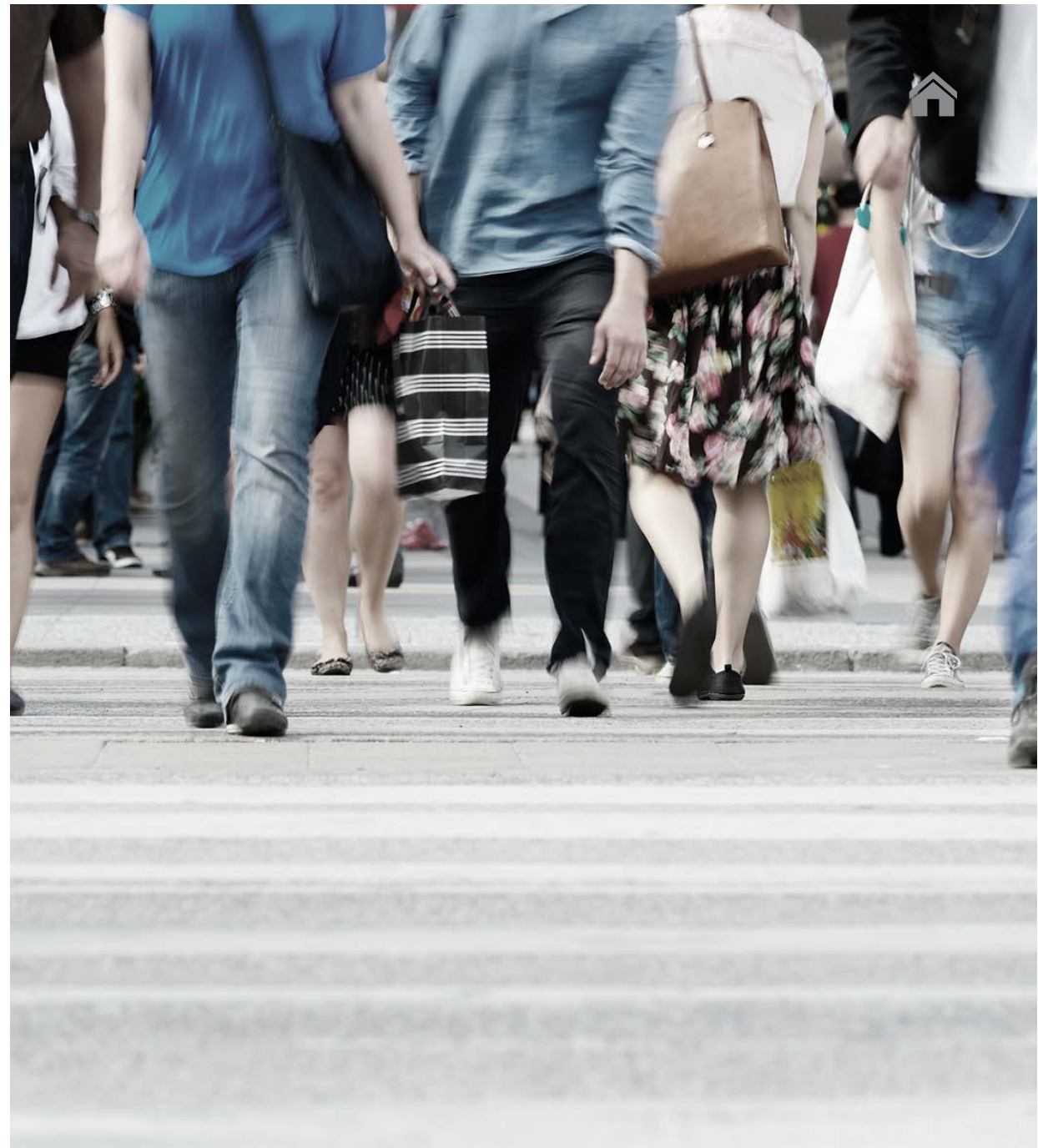


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# SOCIETY



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# LIVERPOOL WAVES OF HOPE EVALUATION: YEAR 3 REPORT



**An evaluation of the third year of Liverpool Waves of Hope (LWoH), a project in Liverpool which provides support for people with multiple and complex needs in the areas of substance misuse, mental health, homelessness and offending.**

**Outcomes achieved by service users:** Since last year, significantly more service users have engaged in training activities and in peer mentoring. Despite this, there have been fewer successful move-ons compared to last year, which was partly attributed to high levels of staff absence and turnover.

**Effectiveness of project delivery:** Safe and stable accommodation is key to recovery, yet both service users and case workers recognise the challenges of securing appropriate housing.

**How LWoH is influencing the system:** LWoH has implemented a number of strategies to facilitate systems change and leave a legacy of better support services for people with multiple and complex needs (MCN).

**Steps LWoH has already made in influencing the system:** Overall, the project has had relatively little impact on delivery and commissioning to date. It is important to note that the project's potential to influence the system is limited by external factors such as commissioning cycles, as well as the consideration that some key issues (e.g. housing, dual diagnosis) are national in nature.

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# 'NATURAL' FOOD: WHAT DOES IT MEAN?



**Consumers are more conscious than ever about the safety and trustworthiness of food and drink, which has led to an increase in the use of terms such as 'natural' on packaging.**

To help consumers feel more confident about the safety and purity of their food and drink, manufacturers are having to become more open about their ingredients, production and supply chains.

Although terms such as 'gluten-free' are easy for consumers to understand, 'natural' is slightly more ambiguous, leaving consumers and marketers to define it for themselves.

In this global study, we set out to discover exactly how consumers interpret the term. 'Without artificial ingredients', '100% from nature' and 'healthy' were the three most common associations.

Despite a strong consensus in opinion across the 28 countries, key regional differences were found and are highlighted in the report. For example, LATAM is significantly more likely to associate 'natural' with 'healthy', while North America is significantly more likely to associate the term with 'without artificial ingredients'.

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# ECONOMY & BUSINESS



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# HAS THE DIGITAL BANKING REVOLUTION FINALLY STARTED?

## THE FINTECH LANDSCAPE IN 2018



**Spurred on by Open Banking, advocates of FinTech are forecasting a revolution in the financial services sector.**

But with the change seemingly slow to happen, Tom Erasmus asks will the latest innovations finally overcome consumer inertia?

Anyone involved in the financial services sector in recent years will be aware of claims that FinTech is poised to shake up the dominance of established banks and provide customers with a host of innovative money-management tools created by enterprising startups. The advent of the much-publicised PSD2 legislation in January 2018 has only added fuel to the FinTech fire.

### **You can bank on us**

Large, traditional banks have often benefited from low levels of consumer engagement in the market to retain their customers. Consumer inertia has been identified as one of the major forces shaping the financial services market and slowing down innovation.

### **Rise of the machines**

In a relatively short period, 'mainstream' banking technology has become widespread among UK consumers.

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# BASIC DIGITAL SKILLS UK REPORT 2018



## The level of Basic Digital Skills in the UK amongst the adult population has remained at 79%.

Being able to manage information, communicate, and transact through digital means continue to be the skills people are strongest in, and the proportion having done tasks within these areas in the last 3 months has increased significantly. Creating continues to be the most challenging skill set, particularly being able to create something new from existing online media.

Regionally, whilst the majority of the UK have been stable or seen a small increase in the level of Basic Digital Skills, Northern Ireland and Wales (both 66%) have seen the biggest decreases.

The South East (86%) continues to have the highest level of Basic Digital Skills, followed by Greater London (82%).

In comparison to UK adults overall, 65+ and C2DEs, the groups with the lowest digital capability, continue to have lower levels of device ownership. Since last year, smartphone ownership has increased amongst 65+.

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# MEDIA BRANDS & COMMUNICATIONS



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# VIEWABILITY MATTERS



**In this new paper, we examine what advertisers need to know about advertising viewability.**

We tend to overestimate the impact of a technology in the short term and underestimate its impact in the long term. This maxim, conceived by Roy Amara, an American scientist and futurist, neatly describes the “hype cycle” of new technology and especially that of online advertising.

The promise of online advertising was to deliver more relevant, timely and targeted communications for the mutual benefit of consumers and advertisers. People would only be exposed to ads appropriate to their desires and at the moments when they were most receptive, while advertisers would cut waste and deliver hyper-efficient campaigns through laser-guided audience targeting and personalised messages. It hasn't turned out like that, yet.

Instead, 600 million devices now carry ad blockers and when ads do reach them, people skip and scroll. At the same time, over a third of programmatic ads are served to the wrong target audience, while ad fraud means that around 10-30% don't reach human eyes at all.

This paper explores the current reality of online advertising, what the challenges mean for advertisers and why success is grounded in robust research and survey data.

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# OPINION



# IPSOS MORI OPINION



## The Hacker: Why Protecting your Data is More Important than Ever Before

These days almost all companies recognise that they must take appropriate security measures to prevent hacks or data leaks. With advancements in technology happening at a record speed, and with data being recorded and stored in greater volumes than ever before, it is critical that companies protect their data.

[Read more ...](#)

## 2018 local election analysis by David Cowling

Independent analyst David Cowling looks how the 2018 local election results compare with 4 years ago and asks "how much worse do the Conservatives have to become before voters turn to Labour in sufficient numbers to transform our political landscape?"

[Read more ...](#)

## Going beyond continuous listening ...

In our latest blog, Kimmo Parkki, Director at Ipsos LEAD, explains why continuous dialogue and shared accountability between managers and their direct reports is much more important than formalised "continuous listening" tools and processes

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# IPSOS MORI OPINION



## **Innovation: how behavioural science is helping us improve our understanding of corporate reputations**

The Ipsos Global Reputation Centre is increasingly applying a range of behavioural science-based solutions, to more fully understand what stakeholders and the public really think and feel about brands, find out more from Mark McGeoghegan.

[Read more ...](#)



## **Ben Page looks at rising concern about mental health**

In his latest blog for the Municipal Journal (MJ) Ben Page looks at our latest polling for NHS Providers looking at the public's views towards funding of the NHS, and their priorities when receiving care.

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## CONTACT US



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All methodological details are available via the  
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