

# Ipsos MORI Highlights

## June 2018

- The public's two main concerns remain Brexit and the NHS
- Half of public think Brexit is working out as expected – but only 9% think it's better than expected.
- Most remain negative about Mrs May's handling of negotiations
- Most support dropping cap on immigrants who come to work in the NHS
- Britain lags behind Canada and the U.S. in new Inclusiveness Index
- We review public views of funding for the NHS as it turns 70
- 4% of the British expect to win the World Cup



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# WELCOME TO JUNE HIGHLIGHTS

Ever since the Brexit vote, it has remained one of the public's main concerns, joined by the NHS more recently, as anxiety about immigration recedes (in part because of Brexit).

Despite the worst score on dealing with Brexit we have so far recorded for the Prime Minister, our June Political Monitor finds the parties still locked within spitting distance of each other.

This month we look at fans' views of the World Cup (4% of the British expect England to win, so disappointment may not be too great), and at inclusiveness – which societies are most welcoming to outsiders? Canada and the US lead the way, with Britain in 10<sup>th</sup> place globally, but Britain is far more accepting of difference than some countries – for example the British are far more likely to say Muslims can be 'real Britons' than Germans are to accept Muslims as Germans.

In the wake of Windrush we look at attitudes to immigration in depth – some 60% of the British support a hostile environment for illegal immigrants, but favour relaxing caps on staff coming to Britain to work in the NHS, and for many skilled jobs.

Most in Britain agree there is a housing crisis, and this month we find 80% recognise social housing as important, although we massively

over-estimate how prevalent it is, thinking 39% of us live in social rented accommodation – the actual figure is nearer 17%.

In a few days the NHS turns 70 – and the government has announced £20 billion in extra funding. This month we look at how the public think this funding should be raised.

Finally we look at digging into culture to really understand people – and the impact of just watching, not asking, as well as how to capture people's attention in digital communications – you have four seconds!

As ever let me know what you think!

Yours



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# IPSOS MORI'S JUNE HIGHLIGHTS



## POLITICS

- The public's two main concerns remain Brexit and the NHS
- Half of public think Brexit is working out as expected
- Half of public in favour of relaxing visa cap for non-EU skilled workers
- Attitudes towards immigration after Windrush



## ECONOMY & BUSINESS

- The British are becoming more positive about the UK's economy
- What's going on in the UK's top boardrooms?
- Automatic enrolment: quantitative research with small and micro employers



## INTERNATIONAL

- Britain lags behind Canada and the US in new Inclusiveness Index
- Global attitudes towards the World Cup 2018 in Russia



## SOCIETY

- The power of culture



## HOUSING

- Rethinking social housing



## HEALTH

- The public and the NHS: what's the deal?
- Understanding public attitudes to social care funding reform in England
- What does the public think about funding for health and social care?



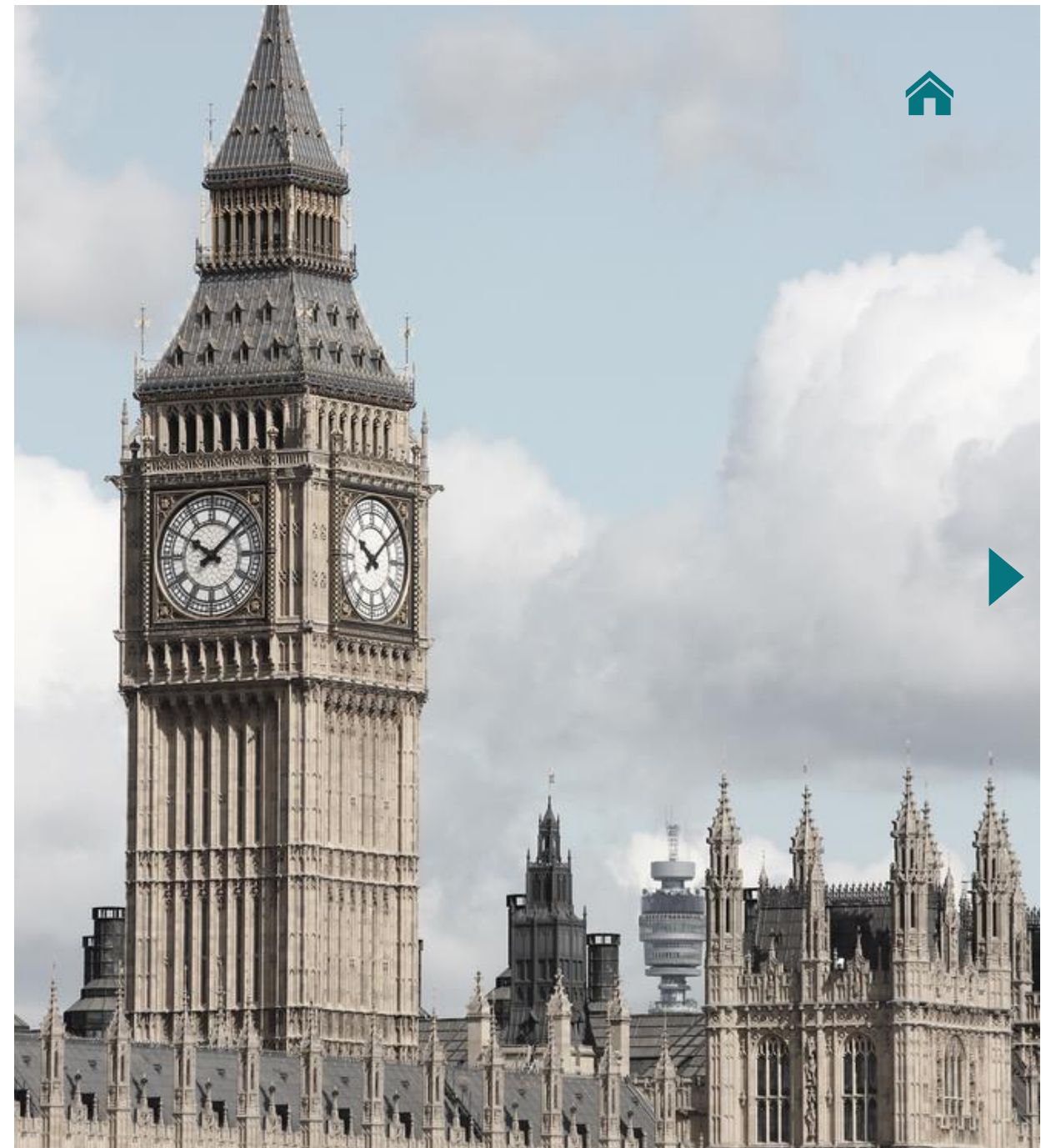
## MEDIA, BRANDS & COMMUNICATIONS

- Attention 2.0: Viewability with Brand Impact



## OPINION

# POLITICS



# IPSOS MORI ISSUES INDEX JUNE 2018:



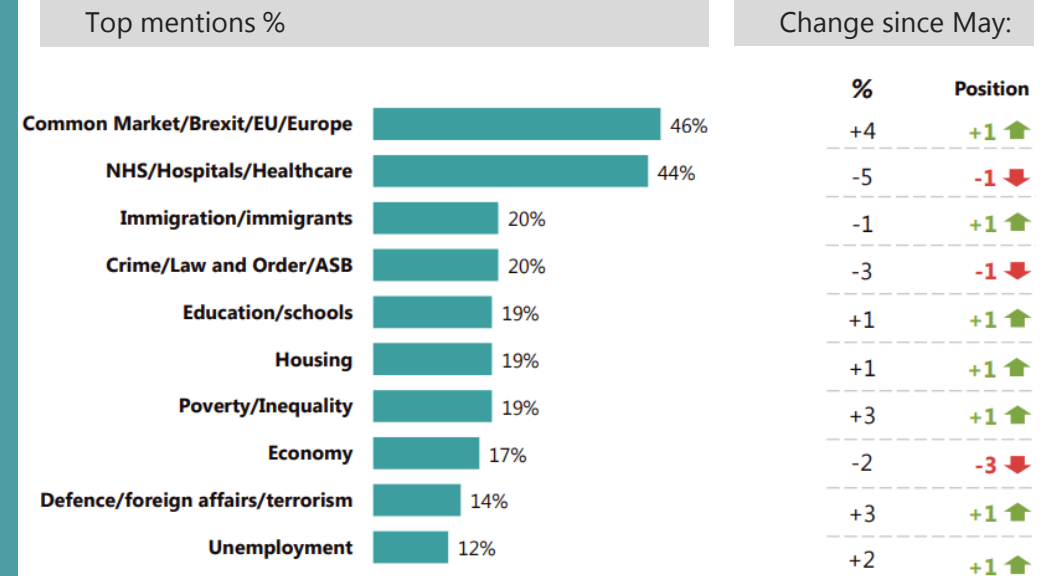
## THE PUBLIC'S TWO MAIN CONCERNS REMAIN BREXIT AND THE NHS

**Just under half of the British public name either Brexit or the NHS as a big issue for Britain (46% and 44% respectively), while one in five mention crime or immigration.**

- This month there has been a rise in concern about Brexit (up by 4 to 46%) and a slight fall for the NHS (down 5 to 44%), but both issues remain tied at the top.
- Concern about crime has fallen slightly since last month, although one in five still see it as a worry (20%). This month it is the joint third-largest issue, alongside immigration (20%), education, housing and poverty/inequality (all 19%).
- Ahead of the NHS' 70th birthday, concern about the health service is highest among Labour supporters and those from social grades A and B.
- Labour supporters are slightly more likely to see the NHS as a bigger worry than Brexit, with 54% mentioning the former and 47% mentioning the latter – although they remain more likely to see Brexit as the single biggest issue (by 29% to 15%).
- For Conservatives, Brexit is the major focus. Two-thirds mention this as a big issue for Britain (64%), and almost half identify it as the single biggest issue (45%).

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



Base: 974 British adults 18+, 1 – 12 June 2018

# HALF OF PUBLIC THINK BREXIT IS WORKING OUT AS EXPECTED

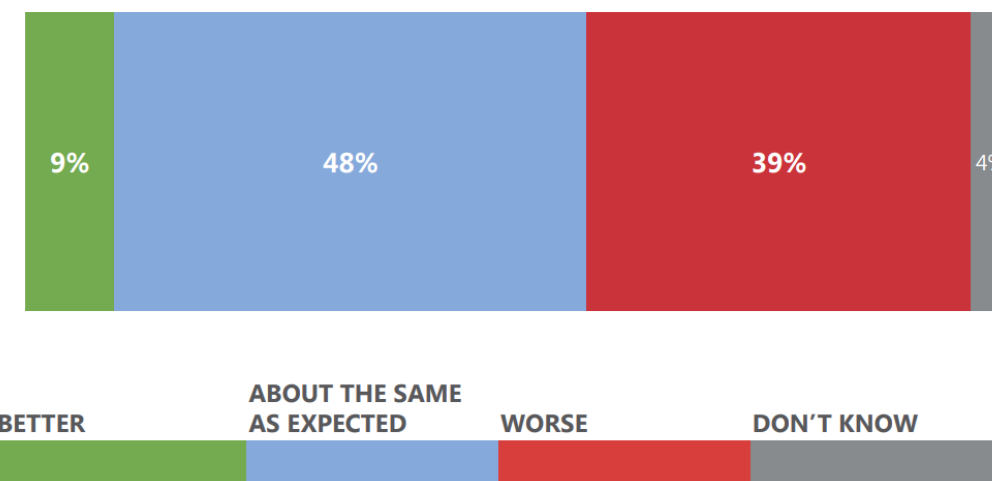


**The May 2018 Political Monitor shows half of public think Brexit is working out as expected while four in ten think that it is worse.**

- Half of public think Brexit is working out as expected – four in ten that it is worse. Half (48%) say that it is going as they expected while two in five (39%) say it is going worse than expected. Just 9% say it is going better than expected.
- Confidence in May to get a good deal for Britain from the EU negotiations remains low. A third (34%) say they are confident when asked if the Prime Minister will get a good deal for Britain in negotiations with other European Union leaders, while nearly two-thirds (63%) are not.
- There has been little change from last month when it comes to leadership satisfaction ratings. Thirty-seven percent say they are satisfied with how Theresa May is doing her job as Prime Minister (down 1 point) with 56% saying they are dissatisfied (up 1 point) leaving her with a net satisfaction score of -19.
- Despite little overall change in leadership satisfaction scores Theresa May has seen a small decline in satisfaction from her own supporters. Seven in ten (70%) Conservatives say they are satisfied in the Prime Minister (down 7 points) while a quarter (27%) say they are dissatisfied in her (up 8 points).

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Regardless of how you voted in the EU referendum, do you believe Britain's exit from the European union is working out better or worse, or about the same as you expected?



Base: 1,015 British adults 18+, 18th – 22nd May 2018



# HALF OF PUBLIC IN FAVOUR OF RELAXING VISA CAP FOR NON-EU SKILLED WORKERS



**The Political Monitor shows trust in the PM to make the right decisions on immigration has fallen significantly.**

Half of public are in favour of relaxing visa cap for non-EU skilled workers like engineers and teachers, and even more when it comes to doctors:

- Thirty-seven percent think there should be no cap on doctors while a quarter (27%) think it should be increased.
- A quarter (27%) think there should be no cap on engineers and a fifth (22%) say it should be increased.
- A quarter (27%) say there should be no cap and a fifth (21%) say it should be increased for teachers.
- A fifth (21%) say there should be no cap for computer and technology experts and another fifth (20%) say it should be increased.

Trust in Theresa May to make the right decisions on immigration has fallen significantly since 2016. When asked how much they trust Theresa May to make the right decisions for Britain on immigration, 36% of Britons say they trust her a great deal or fair amount – 21 points down since September 2016.

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# ATTITUDES TOWARDS IMMIGRATION AFTER WINDRUSH



**Immigration attitudes remain more positive than pre-Brexit vote, but only one in five say they have become more positive about immigration since then.**

Attitudes towards immigration remain more positive than pre-Brexit vote but over half still want overall numbers reduced.

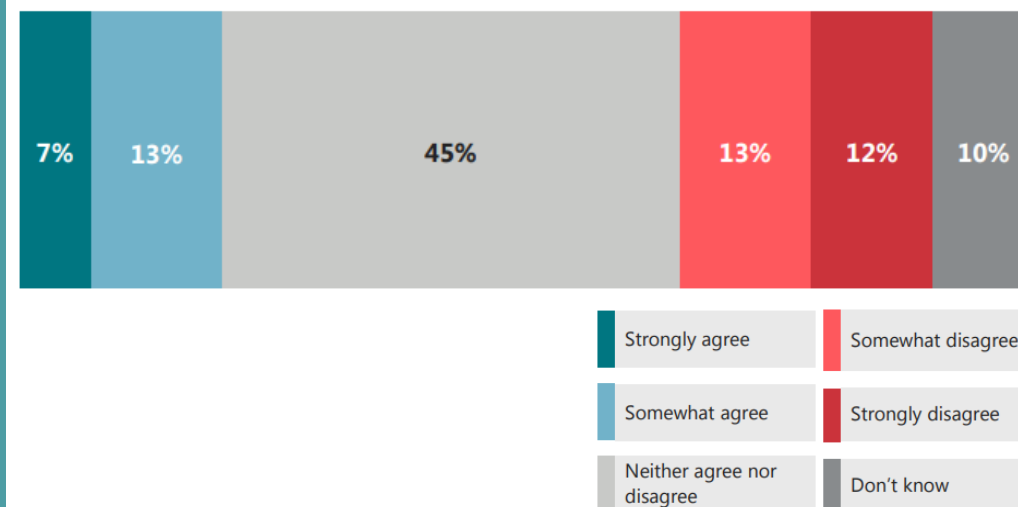
Levels of dissatisfaction with how the government is dealing with immigration have increased - up to 60% from 53% February of this year and have returned to similar levels under David Cameron's government.

One in five people say they have become more positive about immigration since the Brexit vote whereas one in four say they have become more negative. Among those who have become more positive, there are roughly two equal reasons for this- either because people feel more positive about the contribution immigrants make or that with Brexit they are reassured that there is, and will be, a reduction in immigration.

Six in ten (60%) people support an immigration policy that is designed to make it as difficult as possible for people who do not have the right to be in the UK to stay here. But almost two-thirds (64%) also prioritise that people who have the right to be here are not forced to leave, even if this means that some illegal immigrants are not deported.

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**Since Britain has voted to leave the European Union I have become more positive about the impact immigration has on Britain**



Base: 1,067 GB adults aged 18-75 conducted online 11-14 May 2018



# ECONOMY & BUSINESS



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# THE BRITISH ARE BECOMING MORE POSITIVE ABOUT THE UK'S ECONOMY



**The Ipsos Global Advisor Economic Pulse for May 2018 shows that the public have become more positive about the economy over the last year.**

The UK's economy is now growing at the slowest rate in over 5 years and expert commentators are talking about 'uninspiring growth' and 'a stalling economy'. However, the latest monthly Ipsos Global Advisor Economic Pulse shows that the public have become more positive about the economy over the last year. Over half (51%) of UK respondents rated the UK's national economic situation in May as good (+6 percentage points up on April, and +12 points since July after the election).

When people think about their own area, only 35% think their local economy is strong - much lower than in the US and Germany (both 58%), but better than the 24% in France, 18% in Spain and 15% in Italy. Local economic confidence in the UK is the highest since May 2017.

When it comes to the future, people are more circumspect as Brexit looms. But while only 19% believe that their local economy will grow stronger in the next 6 months this is better than both France (11%), and Italy (10%). Local economic optimism is 7 percentage points higher for the UK than at the same time last month (April 2018) and the highest rating for this metric since September 2015.

[Read more ...](#)



# WHAT'S GOING ON IN THE UK'S TOP BOARDROOMS?



## The best of Ipsos MORI's Captains of Industry study analysis.

Our annual Captains of Industry study offers organisations unique insights from one of the country's most highly influential groups. Running for 36 consecutive years and the only survey of its kind offered in the UK, the study is *the* authoritative source of opinion from Britain's most senior business leaders. With around 100 face-to-face interviews conducted every year with leaders from the top 500 companies in the UK, we get to the very heart of their opinions on the most pressing issues of the time.

Here's some of our best analysis of the 2017 study:

[Two-thirds of Ipsos MORI Captains not confident in Government's ability to negotiate with the EU](#)

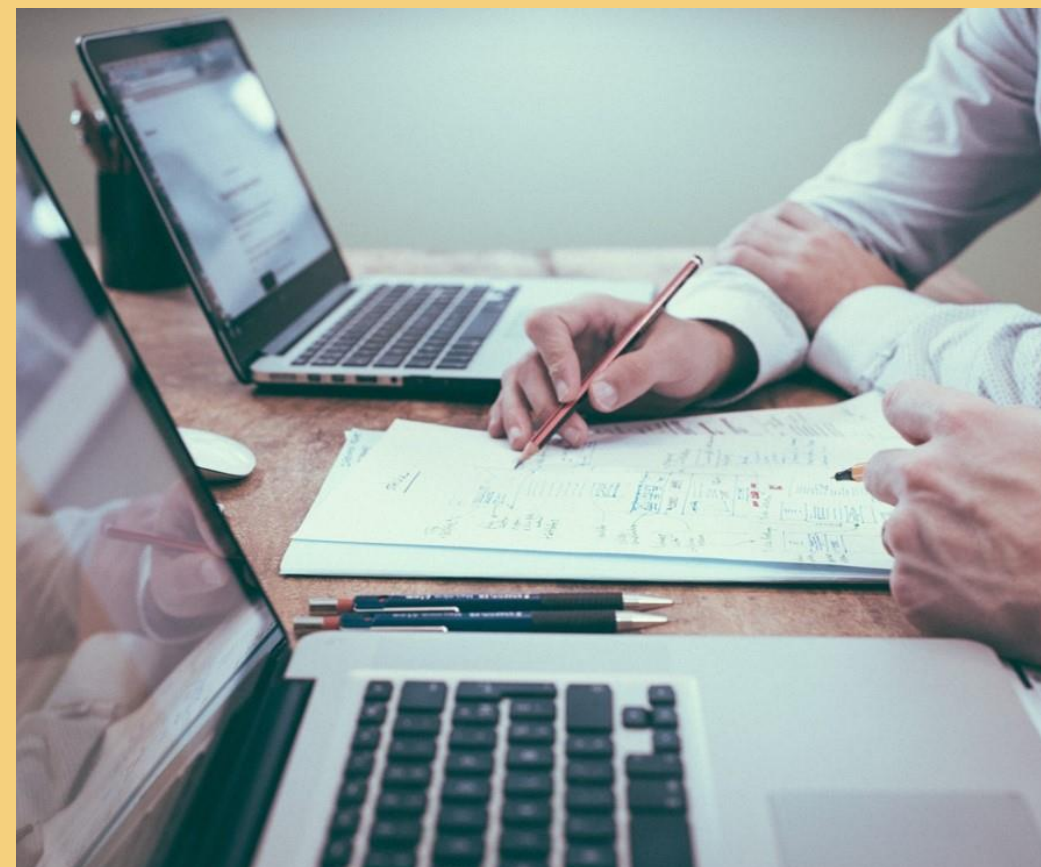
[Women and Diversity in the boardroom](#)

[Transport a block to business say Captains of Industry](#)

[Customer Experience gaining importance in UK boardrooms](#)

Ipsos is now looking for partners to ask our business leaders questions in the next survey. **For more information on how your organisation can be part of the 2018 study**, [contact Juliette.Albone@ipsos.com](mailto:Juliette.Albone@ipsos.com)

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# AUTOMATIC ENROLMENT: QUANTITATIVE RESEARCH WITH SMALL AND MICRO EMPLOYERS



**The report explores the experiences of small and micro employers who automatically enrolled their staff into a workplace pension, and the opt-out rate among these staff.**

The results indicate that small and micro employers are typically supportive of offering their staff a workplace pension and generally have a positive attitude towards the automatic enrolment policy.

- Four-fifths (81%) of these employers agreed that workplace pensions were a good thing for their workers and seven in ten (71%) agreed the automatic enrolment policy was a good thing for their workers.
- Two-thirds (66%) of employers viewed the increases in minimum contributions as a good thing for their workers.
- The vast majority (85%) of workers from small and micro employers stayed in their workplace pension scheme when enrolled.

[Read more ...](#)



# INTERNATIONAL



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# BRITAIN LAGS BEHIND CANADA AND THE US IN NEW INCLUSIVENESS INDEX



**The survey that compares countries' acceptance of social and cultural diversity shows that Canada and the United States have the most inclusive definition of nationality, followed by South Africa, France, and Australia. Britain ranks 10th out of 27 countries in Ipsos's new Inclusiveness Index.**

## Findings for Britain

Six in ten of the British public (59%) think of themselves as a 'real Brit' but less than two in ten (17%) do not. Globally, Britons rank lowest on this measure against an average of 84%.

The British public is fairly inclusive when it comes to certain types of religious belief. The majority of Brits (i.e. over 50%) think that a person who is Christian (65%), Atheist (57%) or Jewish (51%) can be considered a 'real Brit' although this is less so the case for Muslims (46%), Buddhists (48%) and Hindus (48%).

On immigration, Britain is slightly more inclusive than the global average. Half of the public (52%) think that an immigrant who has become a citizen of the UK can be considered a real Brit compared with one in five (22%) who do not.

Over half the public 55% think that immigrants who have become citizens and have a job can be considered real Brits (compared with 20% who do not).

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# GLOBAL ATTITUDES TOWARDS THE WORLD CUP 2018 IN RUSSIA



**The latest Ipsos Global Advisor survey was conducted in 27 countries around the world and explores the attitudes towards the FIFA World Cup 2018 in Russia among those aware of the upcoming tournament.**

- Worldwide, Germany and Brazil are the favourites to win the FIFA World Cup 2018, each picked by around two in ten of those aware of the upcoming competition
- Just 3% of people aware of the World Cup globally think England will win the tournament – and only 4% in the UK
- Overall, people have predominantly positive opinions about the games being held in Russia, though Russians themselves are relatively less passionate football followers
- Real fans: Globally nearly one in four aware of the World Cup state they will miss work or school during the tournament.

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# HOUSING



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# RETHINKING SOCIAL HOUSING



## Public positive about the value of social housing in England, but massively over-estimate its availability

We found 80% agreeing that social housing is important because it helps people on lower incomes get housing which wouldn't be affordable in the private rented sector. By a margin of 6:1, it is seen as playing an important role in tackling poverty in Britain.

Compared to private renting, social renting is seen favourably in terms of affordability, providing a sense of community and providing prompt repairs. Conversely, private renting is seen as providing a greater degree of choice and privacy and peace from neighbours. Overall, social renting is considered better than private renting by 39% with 29% thinking the opposite.

Adding to Ipsos MORI's Perils of Perception series, the survey quizzed people about social housing. It found over-estimates of the incidence of social housing, with a mean estimate of 39 out of 100 adults in England living in social housing, more than double the reality of 17 (according to the English Housing Survey).

[Read more ...](#)



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# HEALTH



# THE PUBLIC AND THE NHS: WHAT'S THE DEAL?



**As the 70th anniversary of the NHS approaches our joint report with The King's Fund explores how the public view their relationship with the NHS – and what this may look like over the next 70 years.**

Seventy years on from the birth of the NHS, the relationship between the public and the health service remains as strong as ever. Participants felt lucky to have the NHS and reflected that it should not be taken for granted. However, they were also aware that the NHS is facing considerable challenges as it approaches its 70th birthday, particularly around funding.

Overall, people believed that the founding principles of the NHS – free at the point of need, available to all and funded through taxation – are as relevant today as they were in 1948.

Like any relationship it is not perfect, and the public highlighted a number of areas where the NHS could improve – not least around waste. They also reflected on what more people could do to help sustain the NHS, particularly around using services appropriately and taking responsibility for their own health.

While there was a feeling that some people do take the NHS for granted and demand too much of it, participants mostly felt that their expectations were being met, and that these expectations are realistic.

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# UNDERSTANDING PUBLIC ATTITUDES TO SOCIAL CARE FUNDING REFORM IN ENGLAND



**People don't understand how social care is currently funded, which makes discussing future options challenging. The report, prepared for the Health Foundation and The King's Fund, explores public attitudes to social care funding reform in England.**

The overall conclusions drawn from the research are:

- A lack of knowledge about how social care funding works remains a significant barrier to public engagement
- Assumptions about who pays for social care shaped their views of the models
- Being fair to older people and those with housing assets dominated discussions about fairness more generally
- Intergenerational fairness was hard to grasp and not a priority relative to other aspects of fairness
- Participants want a change, but do not trust the government to do the right thing
- Participants wanted a better funding model that addressed their key concerns and priorities

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# WHAT DOES THE PUBLIC THINK ABOUT FUNDING FUNDING FOR HEALTH AND SOCIAL CARE?



## Our survey of public attitudes towards funding for health and social care for NHS Confederation

A recent report by the Institute for Fiscal Studies and others suggests that UK spending on healthcare will need to increase by 3.3% a year over the next 15 years to maintain current levels of service, or by 4% a year over the next 15 years to make 'modest improvements' to current levels of service. The public support an increase in UK spending on healthcare, to either maintain current levels of service or make 'modest improvements'.

There was even stronger public support for increasing UK spending on social care to meet the needs of an ageing population and more younger adults living with disabilities.

The public are most supportive of charging patients for missed appointments, (43% strongly agree) and least supportive of increasing government borrowing (8% strongly agree).

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# SOCIETY



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# THE POWER OF CULTURE



**Cultural insight increasingly offers clues and explains behaviour in a way other forms of analysis can miss or overlook. Culture is everywhere - it shapes how we dress, how we vote and the way we view the world. Culture guides our behaviours, values and perceptions.**

We have explored the way in which culture affects our social norms and the underlying tensions it can create – whether that be in brands, business, politics or society. If we don't focus in on culture, how can we expect our communications to be effective, our brands to have salience, or our policies to be attuned to people's true beliefs and behaviours? Our latest paper showcases some practical solutions to building cultural understanding, sharing examples from business and government which have led to more culturally relevant, impactful outcomes.

The paper features:

Mars Petcare's award-winning story with **Oliver Sweet, Head of Ethnography, Ipsos MORI.**

Public Health England on cultural analysis with **Matthew Walmsley, Deputy Director, Strategy and Behaviour Change**

The Economist on gender norms with **Marina Haydn, Managing Director, Global Circulation, The Economist**

[View event video ...](#)

[Read more ...](#)





# MEDIA BRANDS & COMMUNICATIONS



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# ATTENTION 2.0: VIEWABILITY WITH BRAND IMPACT



**The often-forgotten secret of digital advertising is that it's just advertising. Great digital creative can gain attention and impact the brand (even if it's just a simple banner ad).**

Rules for strong creative:

**Look Don't Read:** ads that were recognised by over 65% of participants, with less than 4 seconds of dwell time, were designed to work without reading.

**Big Bold Branding:** ads that had a positive impact on purchase intent have up front branding, the less successful ads left it to the end. Boldness in brand colours, and a good sized and positioned logo aid recognition.

**Get to the Point:** ads with impactful messaging got to the point quickly, and didn't assume that people would watch continuously, they delivered the message up front. Though all digital ad formats can provide brand impact, it is important to be mindful of how people view them.

**Strong Visual Hierarchy:** diagnosing where your viewer is likely to look and focusing your message there is more likely to lead to brand impact. If your ad is likely to be read from top to bottom, the top half is more likely to gain attention.

**Remember:** viewability doesn't equal attention, attention doesn't equal brand impact. Good ads make their point quickly and clearly.

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# OPINION



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# IPSOS MORI OPINION



## Steps you need to take for successful continuous dialogue

In our latest blog Sean Mills, Executive Director at Ipsos LEAD, discusses the steps you need to take for successful continuous dialogue with your employees.

[Read more ...](#)

## Super-clear? Where next for regulation of the food and drink industry.

Legislation related to transparency generally, and obesity and healthy eating in particular is looking increasingly likely to be heading this way. How can companies handle this in terms of their communications?

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## Impersonal service? Ensuring AI enhances rather than diminishes the customer experience

Matthew Chatterton highlights five steps companies can take to ensure AI plays a positive role in delivering for customers.

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# IPSOS MORI OPINION



## Keeping the patient at the heart of care

How the NHS needs to keep its eye on the prize at the centre of integrated care, by Kate Duxbury, Ipsos MORI; Don Redding, National Voices; Charlotte Augst, Richmond Group; and Imelda Redmond, Healthwatch

[Read more ...](#)

## The NHS is nowhere near crisis point yet

But there is still much that it could do better, writes Ben Page in the British Medical Journal (BMJ).

[Read more ...](#)

## Rules for the perfect gift

'Gifting' is not a new concept in Marketing, but continues to be an important one. Whenever anyone gives a gift, they are expecting something in return - an appreciation perhaps, or a shared bonding moment. This is the principle of reciprocity.

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## CONTACT US



For more details on any of the studies featured here, please contact your usual contact at Ipsos MORI or alternatively get in touch with

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All methodological details are available via the website links



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