

Ipsos MORI Highlights

July 2018

- Public concern about Britain and Europe has hit previously unrecorded levels
- Theresa May falls to her lowest satisfaction level recorded post Chequers Deal
- Our latest report on 'The lives and choices of Generation Z' – they are mild not wild, but definitely non-binary
- Britons most positive globally about their healthcare system – but worry about capacity and think new NHS funding will preserve current standards, but not lead to improvements
- New study sheds a positive light on attitudes towards the UK LGBT community



Ipsos MORI

WELCOME TO JULY HIGHLIGHTS

Welcome to our review of July – this month saw concern about Brexit reach unprecedented heights and Theresa May's rating, among the country as a whole, and among Conservative voters, fall to a new low. However, she is still more likely than any contender to be seen as the best person to lead Brexit negotiations, despite her rating as a good person to be prime minister falling from 55% in 2016 to 34% now, similar to Jeremy Corbyn on 31%.

Elsewhere, the NHS celebrated its 70th birthday on 5th July, and our global poll this month found that Britain remains incredibly positive about the NHS: 87% say it is a 'good thing' – up from 75% in 1948, and the British are the most positive in the world about the healthcare they can access. However they are also most likely in the world to say their healthcare system is over-stretched. The £20 billion birthday present of extra funding announced by Theresa May is deemed by the public as likely to maintain the NHS as it is – but not improve it. It will be interesting to see how – if at all – taxes are raised to pay for it.

This month we released a detailed report on Gen Z (born after 1995) – who are definitely more mild than wild, and also more fluid than previous generations – while 88% of Baby Boomers describe themselves as completely heterosexual, the figure for Gen Z is 66%.



Elsewhere in a bumper issue, we look at global attitudes to human rights, how the British regard the LGBT community, and housing and infrastructure, and Love Island! Despite privacy concerns most Britons still access Facebook more than any other service, in our latest tracking report.

Finally with England doing better than most of us expected in the World Cup, we measured the emotion of fans using EEG monitors to see which advertising benefited from the World Cup – and which didn't.

I hope you find something to interest you here; as ever – let us know what you think!

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

Ben Page
Chief Executive, Ipsos MORI

ben.page@ipsos.com

IPSOS MORI'S JULY HIGHLIGHTS



POLITICS

- Public concern about the EU and Brexit rises to historic levels
- Theresa May's ratings fall to their lowest point yet, but Jeremy Corbyn's do not improve



SOCIETY

- Generation Z – Beyond Binary: new insights into the next generation
- Britons split on whether human rights abuse in the UK is a problem
- New study sheds a positive light on attitudes towards the UK LGBT community



ECONOMY & BUSINESS

- Infrastructure fit for the future



HOUSING

- Private Renters' Customer Journeys: qualitative research for Which?



HEALTH

- Global views on healthcare in 2018
- Britons think new NHS funding will preserve current standards, but not lead to improvements
- The public and the NHS: 70 years together



MEDIA, BRANDS & COMMUNICATIONS

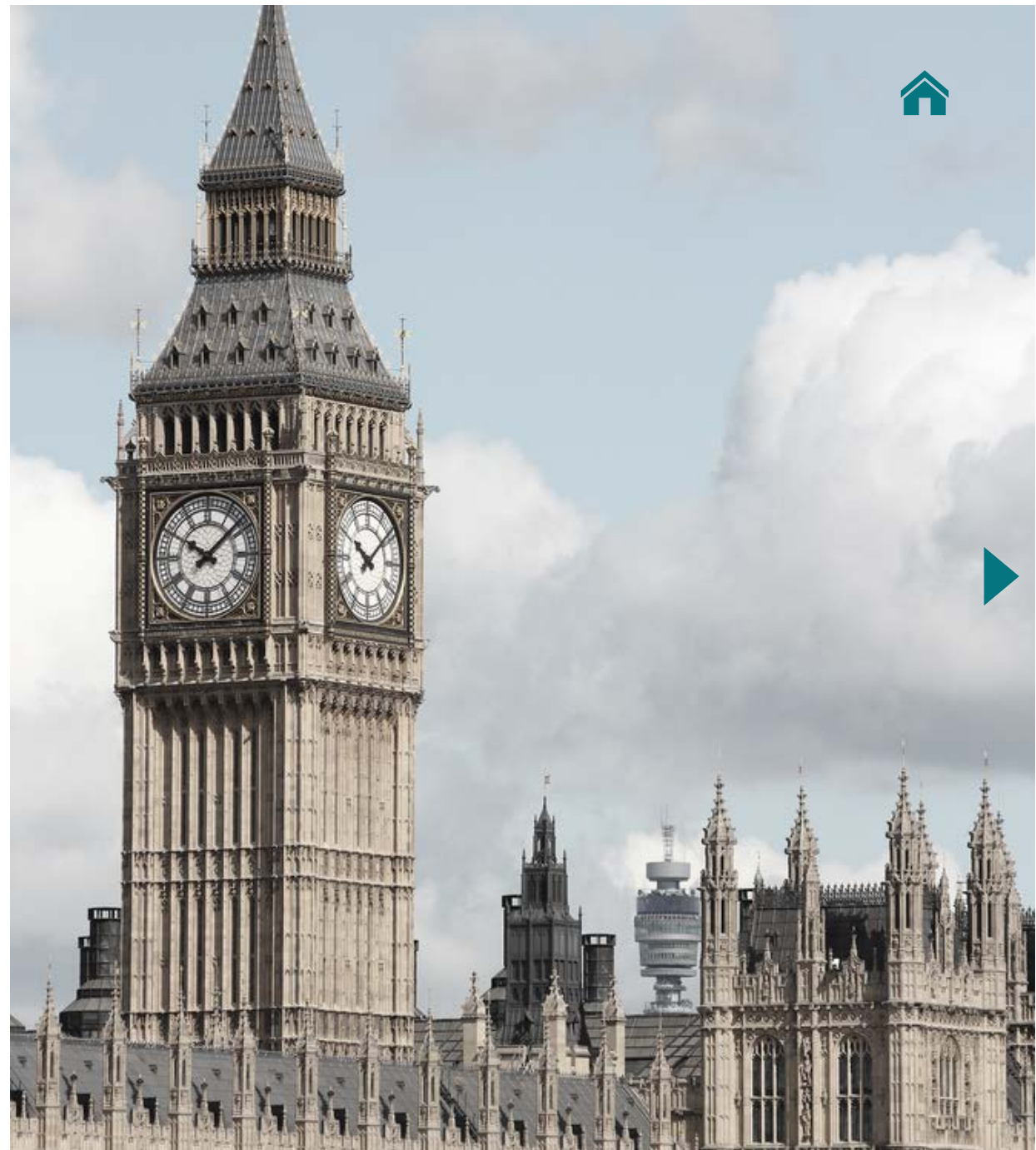
- Love Island's success: A tale of cultural tension
- 2 in 3 adults in Britain are using social media
- Advertising during the world cup: the benefits of emotion



OPINION

- Changing gear: How mystery shopping drives a better automotive CX performance
- When difference doesn't mean different: Understanding cultural bias

POLITICS



PUBLIC CONCERN ABOUT THE EU AND BREXIT RISES TO HISTORIC LEVELS



The Issues Index reveals that public concern about Britain and Europe has hit previously unrecorded levels. After a month that has seen the Government win a series of close-fought Parliamentary votes on Britain's future relationship with the EU despite high-profile Cabinet resignations, close to six in ten of the public now see Brexit as a major issue for the country.

- Fifty-eight per cent of the British public see Brexit as a big issue for the country, a twelve-percentage point rise from June and the highest score recorded since 1974
- Concern about the NHS remains in second place (46%)
- Close to half (45%) see Brexit as the single biggest issue facing Britain
- Concern about the economy records its lowest score since December 2007 (16%), and worry about unemployment has dropped into single figures (9%)

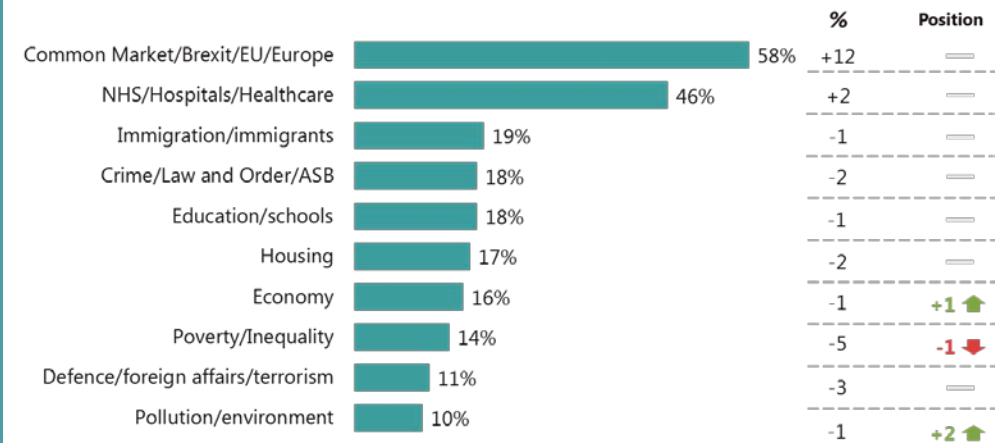
This is the highest level of concern recorded about European-related matters since the Issues Index began in September 1974 – a period that includes the original referendum to enter the then-European Communities in June 1975. The previous highest score was in February of this year (52%).

[Read more ...](#)

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

Top mentions %

Change since June:



Base: 1,027 British adults 18+, 6 – 16 July 2018

THERESA MAY'S RATINGS FALL TO THEIR LOWEST POINT YET, BUT JEREMY CORBYN'S DO NOT IMPROVE



As parliament's summer recess begins with uncertainty around Brexit, Ipsos MORI's new Political Monitor reveals just a quarter (25%) of the public are confident that Theresa May will get a good deal for Britain in the EU negotiations, while 72% lack confidence – a new low for her.

Confidence in Theresa May to get a good deal for Britain in Brexit negotiations reaches a new low (25%) while 72% lack confidence.

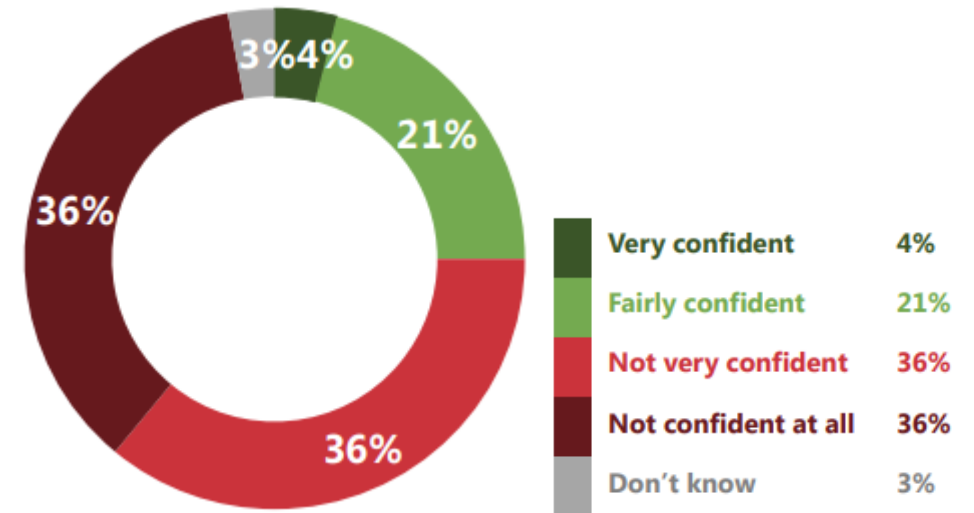
Nearly half think the Chequers plan will be bad for Britain. Three in ten (29%) say it would be a good thing for the UK as a whole, based on what they know or have heard, while nearly half (47%) say a bad thing – one in five (19%) don't know.

But more trust the Prime Minister to make right decisions on Brexit and think she has what it takes to be a good Prime Minister than other leading Conservatives or Jeremy Corbyn. When asked if Theresa May has what it takes to be a good Prime Minister a third (34%) agree, a fall from 44% in April (55% disagree). Three in ten (31%) think Jeremy Corbyn has what it takes – little change from April (61% disagree).

[Read more ...](#)

Please tell me how confident, if at all, you are that Theresa May will get a good deal for Britain in negotiations with other European Union leaders?

July 2018

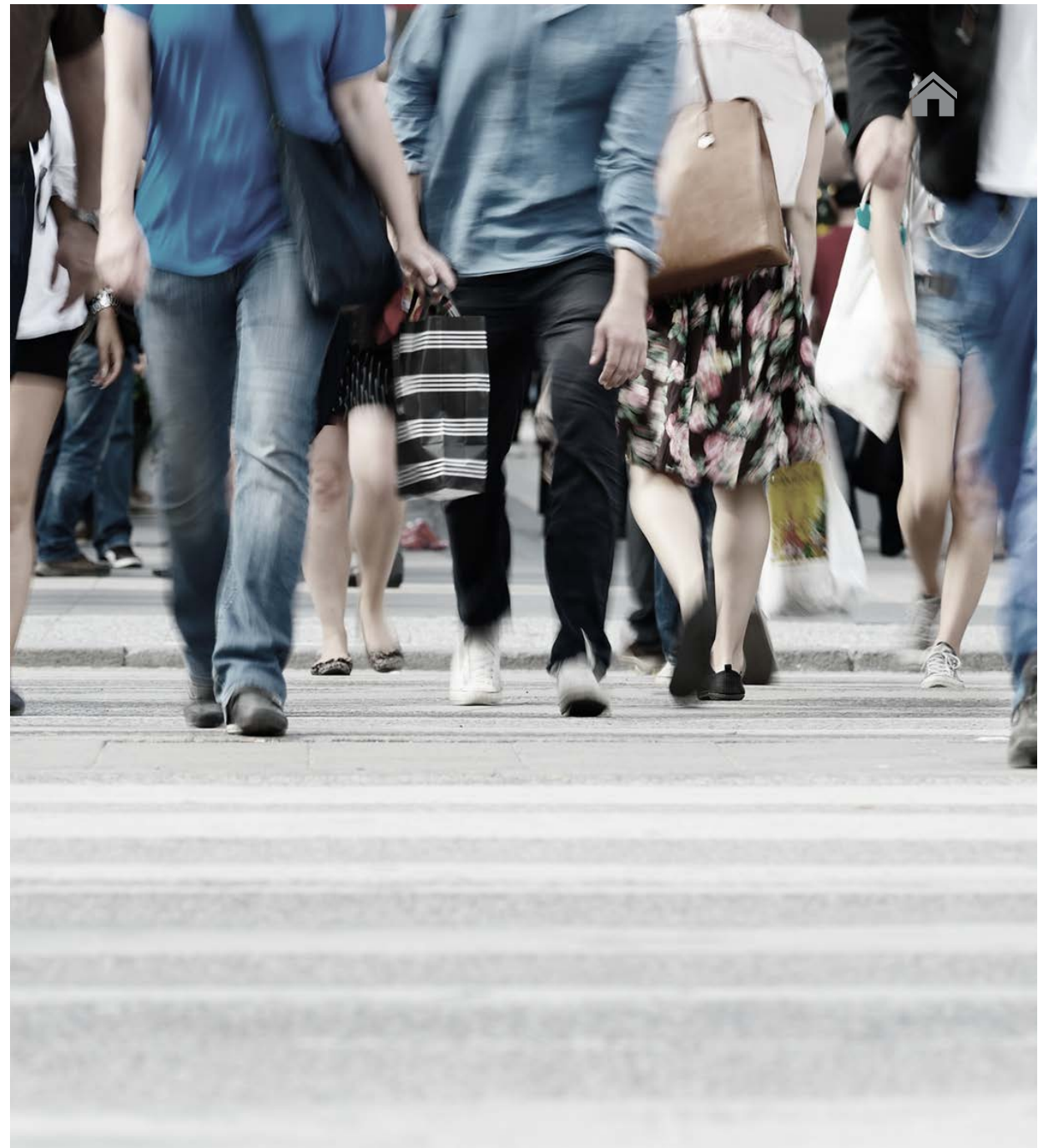


Base: 1023 British adults 18+ 20th – 24th July 2018

SOCIETY



Ipsos MORI



GENERATION Z – BEYOND BINARY: NEW INSIGHTS INTO THE NEXT GENERATION



This report, the latest in our Ipsos MORI Thinks series, pulls together existing and new analysis, as well as brand new research on this latest generation, to provide a better understanding of the initial signals on how they will be different to, or the same as, previous generations.

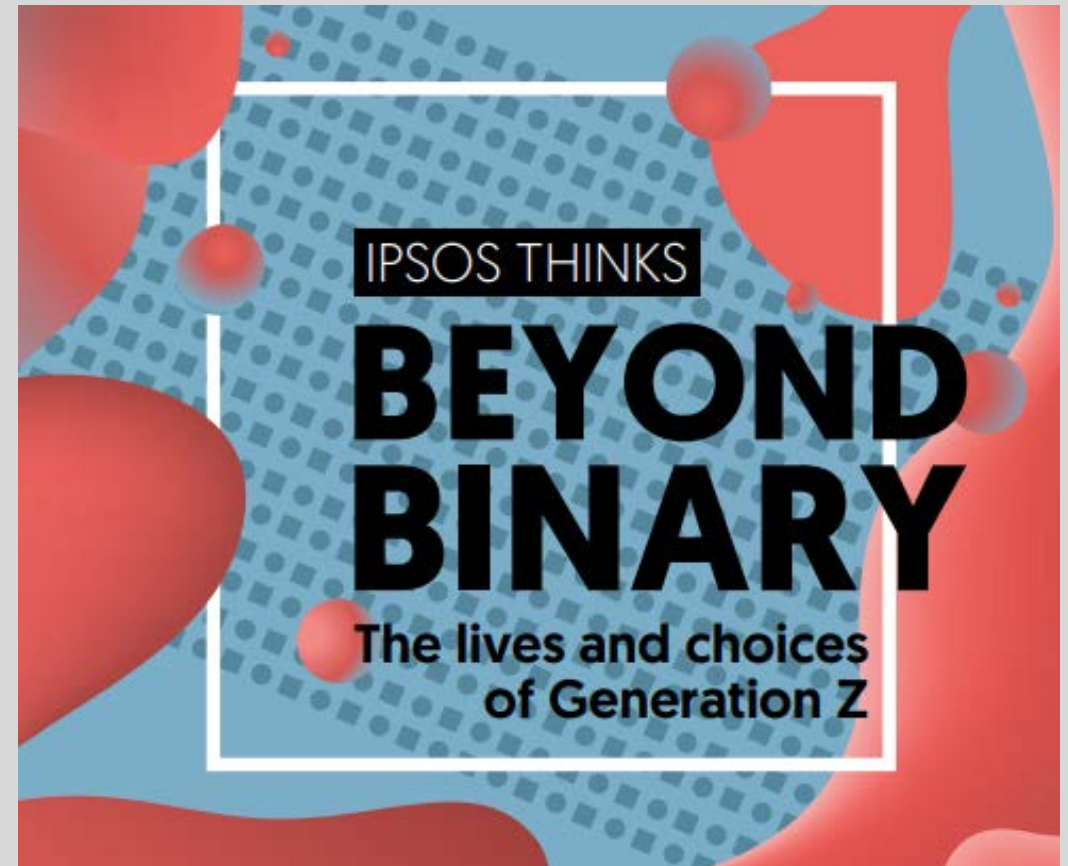
Millennials are old news, with a new generation of young (those born from 1996 onwards) hitting adulthood. Contrary to many clichés about today's young, our new survey data and analysis reveals a better behaved, more trusting, socially minded, and less materialistic generation.

Trust is trendy again: New analysis of Ipsos MORI's Veracity Index shows a stunning cohort shift in trust levels between UK Generation Z and Millennials. Generation Z are nearly twice as trusting of other people than Millennials were at the same age (61% in 2017 compared to 36% in 2002).

Their norms of sexuality and gender are changing: they are much less likely to identify as solely heterosexual and have much greater contact with people who don't identify as just one gender.

Kids are here to volunteer: New data from Ipsos MORI's Young People Omnibus among school children in Britain, shows there has been a cohort shift towards higher social activism.

[Read more ...](#)



BRITONS SPLIT ON WHETHER HUMAN RIGHTS ABUSE IN THE UK IS A PROBLEM



Only four in ten (43%) people globally agree that everyone in their country enjoys the same basic human rights, casting doubt over how universal human rights are in reality – even in some of the most developed countries.

A third of people (33%) outright disagree that everyone in their country enjoys the same basic human rights, and two in ten (20%) are unsure. People in Germany (63%) and China (63%) are most likely to agree that everyone in their country enjoys the same basic human rights while those in South Africa (25%) and Italy (28%) are least likely to agree.

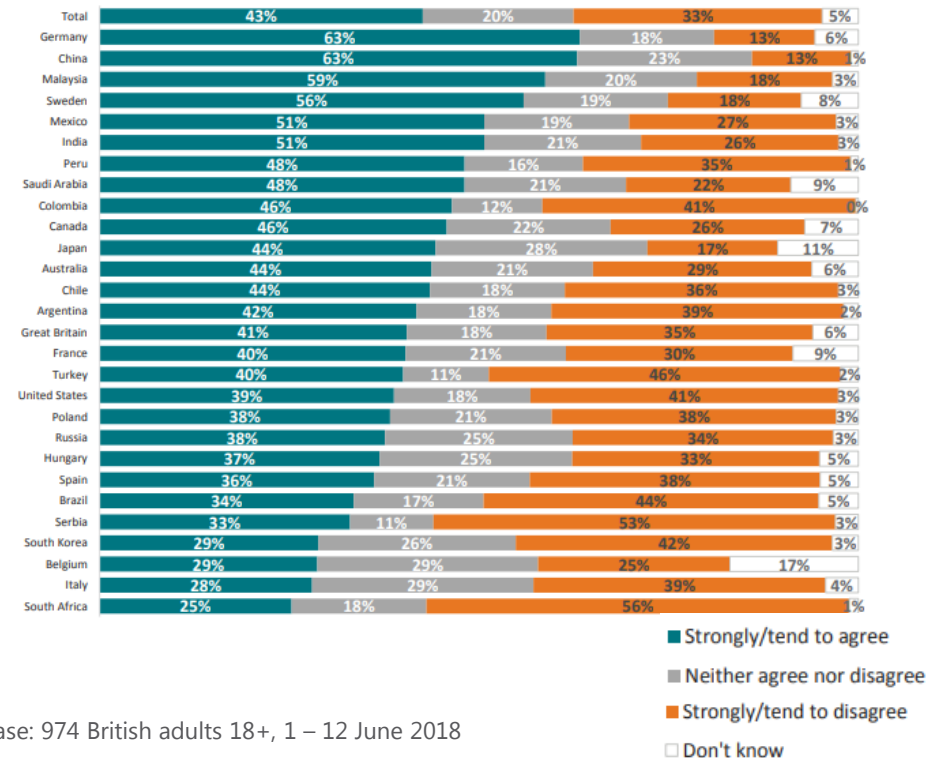
The majority of Britons (80%) agree that it is important to have a law that protects human rights in Britain compared with just six per cent who don't. This is in line with the global average across the 28 countries (78%).

Almost six in ten Britons (58%) say that laws protecting human rights make a positive difference to their lives compared with 1 in 20 who think they have a negative impact and three in ten (30%) who say they make no difference.

Across the 28 countries, those picked out as needing greatest protection from human rights are children (56%), people who are disabled (48%) and older people (44%).

[Read more ...](#)

Everyone in [country] enjoys the same basic Human Rights - % agree



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

NEW STUDY SHEDS A POSITIVE LIGHT ON ATTITUDES TOWARDS THE UK LGBT COMMUNITY



A new study for grooming brand Harry's, reveals that a majority of heterosexuals responding to the survey are ready to leap to an LGBT individual's defence in the face of homophobia, have embraced same-sex marriage and around 1 in 5 would feel trusted if their teenage son or daughter came out to them.

An overwhelming majority of heterosexuals are prepared to stand up to homophobia. 79% of straight people, surveyed by Ipsos MORI, said they would do something if they saw a member of the LGBT community being verbally abused in the street because of their sexuality.

Strong support for 'Straight Ally' schemes to tackle homophobia in the workplace, particularly amongst younger workers.

It might be time for LGBT people to ask their straight mates to Pride.

"Trusted", "Happy" and "Proud" were the most common reactions if respondents had their teenage son or daughter come out to them as gay or lesbian.

Women remain the LGBT communities staunchest allies.

Acceptance of the LGBT community is not quite complete. Whilst 82% of people said they felt comfortable around lesbians and a similar number (81%) were comfortable around gay men.

[Read more ...](#)



A PUBLIC PERCEPTION STUDY FOR THE RAC FOUNDATION



Two thirds (66%) of the public feel that monitoring cameras are more a force for good in society than for bad.

However, when looking towards monitoring behaviour on the roads there is a degree of scepticism amongst the public with over three in five (62%) who feel that some cameras are used primarily to raise money rather than improve traffic flow. Just under half (47%) say they trust the government and relevant authorities to use monitoring and enforcement techniques in the right way.

Despite concerns about the effectiveness of monitoring and cameras, 70% of the public support automated road traffic enforcement (ARTE) (be it through the use of fixed speed cameras, average speed cameras, mobile speed cameras, bus lane cameras, red light cameras or box junction cameras) if it leads to a reduction in the number of accidents and casualties on the roads. Almost as many (66%) support the use of automated enforcement if it frees up more time for the police to deal with other offences.

Although there are positive perceptions of ARTE, there is a degree of cynicism amongst the public as more than eight in ten (83%) agree that speed cameras only cause drivers to slow down for them before speeding up again afterwards, whilst half (50%) believe that ARTE does not effectively discourage drivers from offending.

[Read more ...](#)



ECONOMY & BUSINESS



Ipsos MORI



INFRASTRUCTURE FIT FOR THE FUTURE



The National Infrastructure Commission (NIC) asked how the public feel about the UK's strategic approach to infrastructure challenges over the next ten to thirty years.

The report covers a broad range of infrastructure topics to present the public's perception of the UK's approach to: waste, digital communications, water, flooding energy and transport.

Almost eight in ten (78%) Britons agreed that "the UK is at a turning point; it needs to have a long-term vision for infrastructure, and the confidence to invest in it, to ensure the UK continues to be a good place to live and work."

However, the cost to individuals was also an important consideration, with participants wanting to ensure the cost for future infrastructure did not fall disproportionately on individuals and was, instead, shared among government, manufacturers and other private companies, as well as customers and tax payers.

Protecting the environment was also seen as a priority and an essential part of future-proofing the UK for participants who considered it vital to protect the UK's natural assets from threats such as climate change and increasing pollution levels.

[Read more ...](#)



HOUSING



Ipsos MORI



PRIVATE RENTERS' CUSTOMER JOURNEYS



With the Private Rental Sector growing, notably among families, we followed new and long-term private renters through each stage of their rental journey. Speaking to forty people in total, we explored their experiences of: searching for a home, securing a new place to live, living in the PRS and the process of moving out.

Whilst some of the tenants reported positive experiences of the rental sector there was a wide degree of variance. When taken together, the evidence points to some key problems that can happen across the many varied 'customer journeys' which underpin tenants' experiences of private renting. These problems can be summarised as:

- Financial loss or hardship caused by a variety of factors to do with both the way the private renting market operates and due to some tenants opting to be out of pocket rather than cause 'hassle' with their landlord or letting agent
- Stress and frustration caused by various pressures of looking for private lets where there is limited choice and not enough time to make the best decisions
- Anxiety from living in unsuitable properties or where maintenance and other issues are not adequately dealt with or take a long time to be resolved.

[Read more ...](#)



HEALTH



Ipsos MORI



GLOBAL VIEWS ON HEALTHCARE IN 2018



Britons are most positive globally about their healthcare system and - with Spain - have the highest confidence that they get the best treatment.

Globally, 45% rate the quality of the healthcare they have access to in their country as good, 33% rate it as neither good nor poor and 23% as poor. Countries surveyed where consumers most tend to rate the quality of their healthcare positively are Great Britain (73%), Malaysia (72%), and Australia (71%). Poor ratings outnumber good ratings in nine countries, including Brazil (by 39 percentage points), Poland (31 points) and Russia (29 points).

Among problems facing healthcare systems, access to treatment/long waiting times is the one consumers around the world are most likely to view as a major concern (selected by 40%), most of all in Poland (70%), Serbia (68%), Hungary (65%) and Chile (64%).

Views about the future of healthcare differ widely across countries as optimism prevails in emerging countries (especially China, India, Saudi Arabia, Malaysia and throughout Latin America) while pessimism dominates in many developed countries (especially in Western Europe).

[Read more ...](#)



Ipsos MORI

BRITONS THINK NEW NHS FUNDING WILL PRESERVE CURRENT STANDARDS, BUT NOT LEAD TO IMPROVEMENTS



The June 2018 Political Monitor shows half of Britons think new NHS funding will preserve current standards, but few think it will lead to improvements.

Only 14% of Britons think that the new funding announced for the NHS by the government will lead to actual improvements, according to the latest Ipsos MORI Political Monitor.

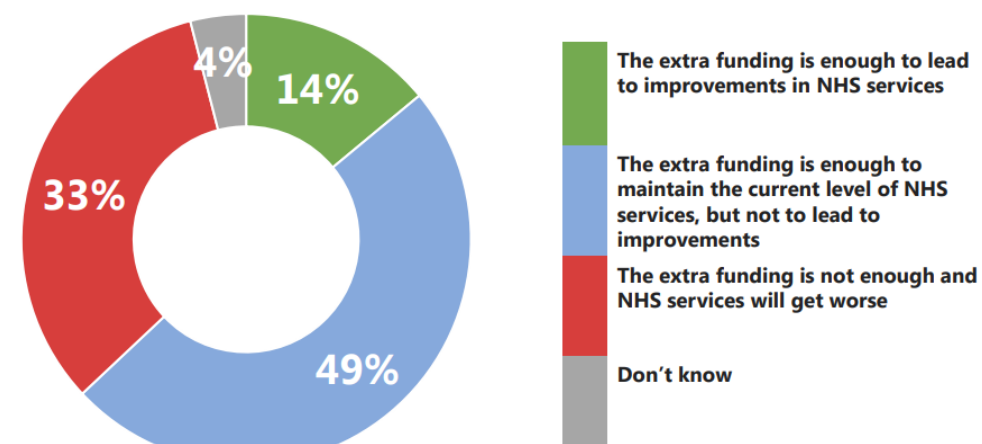
As the NHS celebrates its 70th year half the public (49%) believe the new funding will only be enough to maintain the current level of NHS services, but not to lead to improvements – a third 33% think the amount is not enough and the NHS will get worse.

When asked in which ways they would support paying for this increased funding, most (55%) would back an increase in taxes while 55% also say that there should be more charges for NHS services for people on higher incomes (38% would support higher charges for everyone).

Labour are still seen as the party with the best policies on healthcare by the public. Two in four (40%) pick Labour as the best party, while 22% pick the Conservatives and 5% the Liberal Democrats. This is little change from when last asked in April 2017.

[Read more ...](#)

As you may know the government has recently announced that it will be providing an extra £20billion a year for the NHS for the next five years, an increase of 3.4%. When thinking about the effect this extra funding will have on the NHS, which of the following is closest to your opinion?



Base: 1026 British adults 18+ 22nd – 27th June 2018

THE PUBLIC AND THE NHS: 70 YEARS TOGETHER



To mark the 70th anniversary of the NHS, Ipsos MORI brings together historic data and new analysis in our NHS at 70 infographic, slide packs and reports.

We still really value the NHS and are keen to protect it – 77% of adults agree the NHS is crucial to British society and we must do everything to maintain it

The majority (57%) are satisfied with the NHS, but this is falling and we are worried about the future

We think the NHS needs more money, and we seem willing to pay more tax (66% willing), but we're also wary of the NHS wasting money

We are increasingly concerned about mental health and want it to receive more funding, with 32% concerned about mental health as a public health issue

We think keeping healthy is our responsibility, but the government could also do more – 55% think the government does too little to help people lead health lifestyles

We misunderstand who pays for social care with 47% wrongly thinking social care is free at the point of need and not many of us are preparing financially

[View infographic](#)

[Read more ...](#)



Ipsos MORI

MEDIA BRANDS & COMMUNICATIONS



Ipsos MORI



LOVE ISLAND'S SUCCESS: A TALE OF CULTURAL TENSION



Summer 2018 has been an exciting period for TV audiences. During this untypically hot British summer, more than 3 million of us are foregoing the sunshine in favour of the fourth season of Love Island, making it ITV2's highest overnight rated show ever.

Love Island is beyond doubt a cultural phenomenon. Bucking the downwards trend of many reality TV programmes, Love Island has experienced unprecedented success.

In this piece we explore what makes the Love Island format different, examining four key cultural tensions at play in the show:

- Format (Rigid vs. Fluid)
- Characters (hyper-masculine/feminine standards vs. complexity of individual identities)
- Values (Puritanism vs. Hedonism)
- Romance narratives (Courtship vs. Tinderfication)

[Read more ...](#)



2 IN 3 ADULTS IN BRITAIN ARE USING SOCIAL MEDIA



Technological developments are increasingly rapid, presenting a host of opportunities and risks for businesses. Today's consumers are more connected than ever before, and this makes online platforms and new devices ideal meeting points for brands and their audiences.

Two thirds of GB adults use social media. Whilst we see similarities between genders, we see a significant difference between social grades C1 and DE only, and social media use drops off amongst those aged 55+.

A range of devices are used to access social media. Half of GB adults access social media via smartphones, a third via a laptop/PC, and a fifth via a tablet.

Under 55s are more likely to access social media on smartphones than any other device. 35-54 year olds are much more likely than any other age group to access social media via a tablet.

Smartphones lead for social media across all social grades. Around half of all social grades use smartphones to access social media, with PCs and laptops being the next most likely device. On average, around a fifth use tablets.

Facebook is the most popular social media service among GB adults. 3 in 5 people have accessed Facebook in the past 3 months, with less than half of this number using the second most popular service, Instagram.

[Read more ...](#)



Ipsos MORI

ADVERTISING DURING THE WORLD CUP: THE BENEFITS OF EMOTION



We wanted to understand the impact the emotional response to the World Cup has on advertising. Do people become more emotionally engaged with ads that explicitly refer to the tournament? Can brands ride the back of this emotional wave? And if so, how?

To find this out, we exposed people to 4 different World Cup/Football related ads and used Electroencephalography (EEG), combined with eye tracking, to monitor the unconscious response to the ads both before the World Cup and after England had defeated Colombia.

The results showed that:

- Context does make a difference and that, as personal investment in the world cup grew, so did emotional engagement with some of the ads.
- The ads that benefitted are the ones that fully committed to the tournament by having explicit links to the World Cup e.g. England football or a specific patriotic tone.

[Read more ...](#)



OPINION



Ipsos MORI



IPSOS MORI OPINION



Changing gear: How mystery shopping drives a better automotive CX performance

What should an automotive mystery shopping programme focus on? What do car manufacturers and dealers want from one? Jakub Hankovský explores the different options available to manufacturers, importers and dealerships, and how a well-executed campaign can fuel a better customer experience for customers and employees alike.

[Read more ...](#)

When difference doesn't mean different: Understanding cultural bias

Running global Customer Experience studies provides both better value for money than individual country studies and a degree of standardisation across markets. However, their validity remains at risk from an age-old research problem: cultural bias.

[Read more ...](#)

Ipsos MORI

CONTACT US



For more details on any of the studies featured here, please contact your usual account representative or alternatively get in touch.

Ben Page

Chief Executive

ben.page@ipsos.com

All methodological details are available via the website links.



Ipsos MORI

[**www.ipsos-mori.com/**](http://www.ipsos-mori.com/)