

Ipsos MORI Highlights

August 2016

- Consumer confidence returns to early 2016 level
- PM enjoys honeymoon with voters
- Corbyn remains at historic levels of unpopularity
- Global immigration survey finds no country where a majority think it is positive – but UK more relaxed than many
- 3% of working families lack money for enough food



WELCOME TO AUGUST HIGHLIGHTS

As we head off on our holidays, post-Brexit shock has dissipated somewhat, and consumer confidence is now back at early 2016 levels, following an interest rate cut by the Bank of England. Theresa May, the new PM, currently has 54% of voters satisfied with her, compared to only 28% happy with Jeremy Corbyn, leader of the Labour party. Some 45% say they support the Conservatives, 11 points ahead of Labour.

In the USA, Hilary Clinton is now leading Donald Trump by 12 points, after a series of gaffes. He has just announced that he is “Mr Brexit” – implying he will surprise everyone in the November US election. It looks unlikely right now, but as we all know, unlikely things still happen!

One of the challenges of Brexit for the UK government is reducing immigration while maintaining single market access.

Our latest global study now finds no country where a majority regard it as positive, although Britain is in fact more positive about it than many nations, on many aspects – a position markedly more nuanced than many other countries including France.



Our latest Tech Tracker shows Facebook’s continuing dominance of social media, and our love of it. Some 19% of people say they use social media to feed back on brands – something we examine this month.

We have added in briefings on Africa and Russia in this issue, highlighting their similarities and diversity: 70% of Russians are now online. But whereas the UK and USA’s young people are more pessimistic about the future than previous generations have been, in Africa 81% expect a better future.

Elsewhere we look at housing, the realities of hunger in Britain, what drives people to ad-blockers, trends in customer service and more. Finally I hope you’ve had – or will have - a great break. We’ll be back in September with more!

Ben Page

Chief Executive, Ipsos MORI

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

IPSOS MORI'S AUGUST HIGHLIGHTS



POLITICS

- New Prime Minister starts with a honeymoon among the public
- Concern about the EU reaches second-highest recorded level
- One in ten delay big spending decision post referendum



SOCIETY

- Global study shows many around the world uncomfortable with levels of immigration
- Working families without enough money to afford food
- Ethnography: an unfiltered view of reality



HOUSING

- New survey finds homes with access features have wide appeal among the public



ECONOMY & BUSINESS

- Economic optimism returns to pre-Brexit levels
- Doing the right thing



MEDIA, BRANDS & COMMUNICATIONS

- Side-by-side social intelligence
- Audience measurement in the data age
- Online control in the era of ad blocking



INTERNATIONAL

- Ipsos/Reuters poll: core political approval
- Rock the vote/USA Today millennial poll
- Chinese family parenting report 2016
- African youth: part 2 of our study
- Russia trendvision: state statistics and consumer trends



OPINION



Ipsos MORI

POLITICS



Ipsos MORI



NEW PRIME MINISTER STARTS WITH A HONEYMOON AMONG THE PUBLIC



Theresa May is enjoying a warm honeymoon welcome with the public according to Ipsos MORI's latest Political Monitor.

Key findings include:

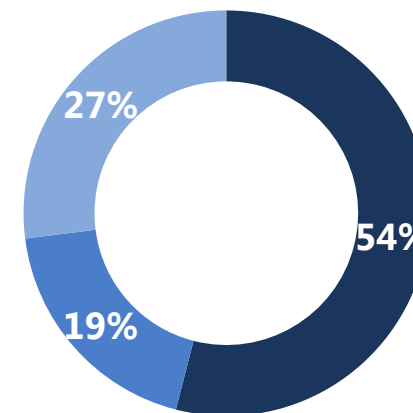
- **More than half (54%) say they are satisfied with Mrs May's performance** in her first month as PM while one in five (19%) say they are dissatisfied – leaving her with a net satisfaction score of +35.
- This is comparable to her predecessor Cameron's rating in June 2010 when 57% were satisfied with him doing his job as PM and 26% dissatisfied.
- Although higher than those of John Major and Gordon Brown in their first month as PM, May's satisfaction ratings are still behind Tony Blair's first month back in May 1997 (65% were satisfied and 5% dissatisfied).
- The new poll reveals that **Corbyn continues to struggle with public approval**.
- One in four (25%) say they are satisfied with Mr Corbyn doing his job as leader of the Labour party and 58% are dissatisfied – leaving him a **net satisfaction score of -33**.

[Read more ...](#)

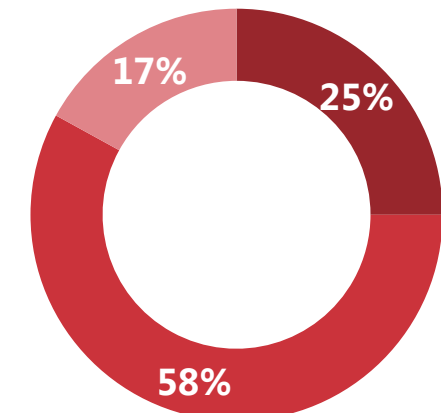
ARE YOU SATISFIED OR DISSATISFIED WITH THE WAY THERESA MAY IS DOING HER JOB AS PRIME MINISTER?

ARE YOU SATISFIED OR DISSATISFIED WITH THE WAY JEREMY CORBYN IS DOING HIS JOB AS LEADER OF THE LABOUR PARTY?

August 2016 (All)



SATISFIED	54%
DISSATISFIED	19%
DON'T KNOW	27%
Net = +35	



SATISFIED	25%
DISSATISFIED	58%
DON'T KNOW	17%
Net = -33	

Base: 1,017 British adults 18+, 13th – 15th August 2016

CONCERN ABOUT THE EU REACHES SECOND-HIGHEST RECORDED LEVEL



The July 2016 Issues Index records the highest level of concern about Europe and the EU since April 1997.

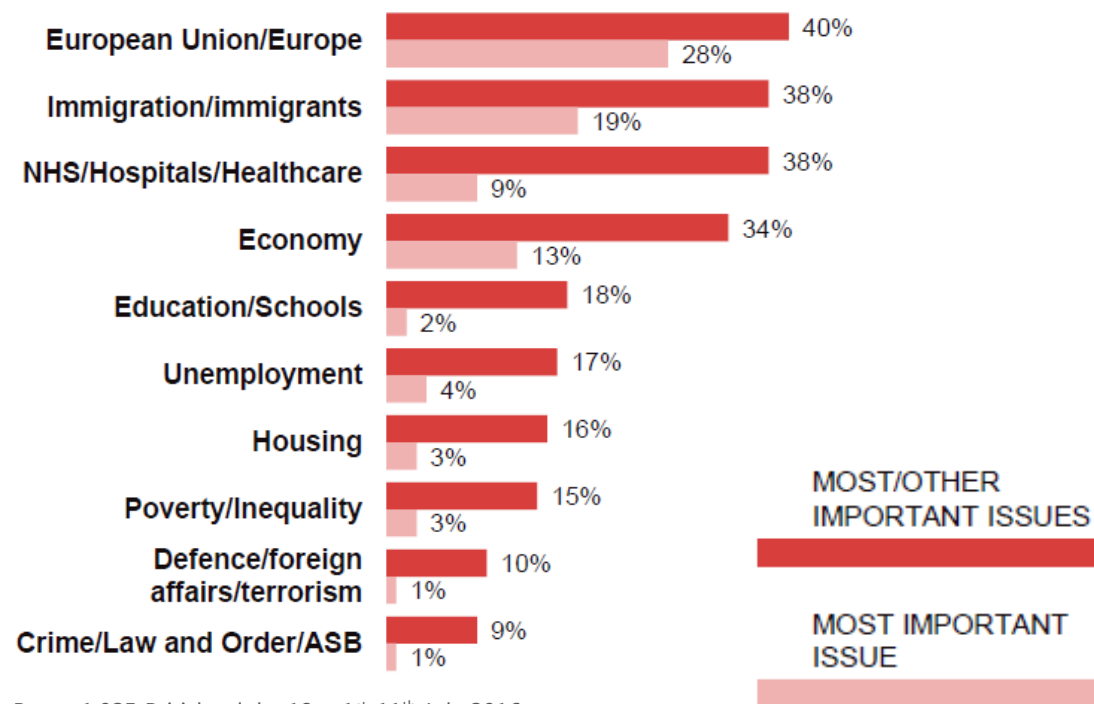
Key findings include:

- 40% consider the EU and Europe an important issue facing the country in the aftermath of the referendum decision to leave the EU in June. This is an **eight percentage point rise since last month**, when 32% considered it an important issue.
- There has been a seven percentage point rise in the proportion who say that the economy is an important issue; this month 34% say that the economy is an important issue. This view is more common amongst those from social grades AB, people aged 45-64, and Conservative party supporters (all 48%).
- Concern about **immigration has meanwhile fallen by ten percentage points**, to the lowest level seen since before the 2015 General Election.

[Read more ...](#)

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

Top mentions %



Base: 1,025 British adults 18+, 1st-11th July 2016

ONE IN TEN DELAY BIG SPENDING DECISION POST REFERENDUM



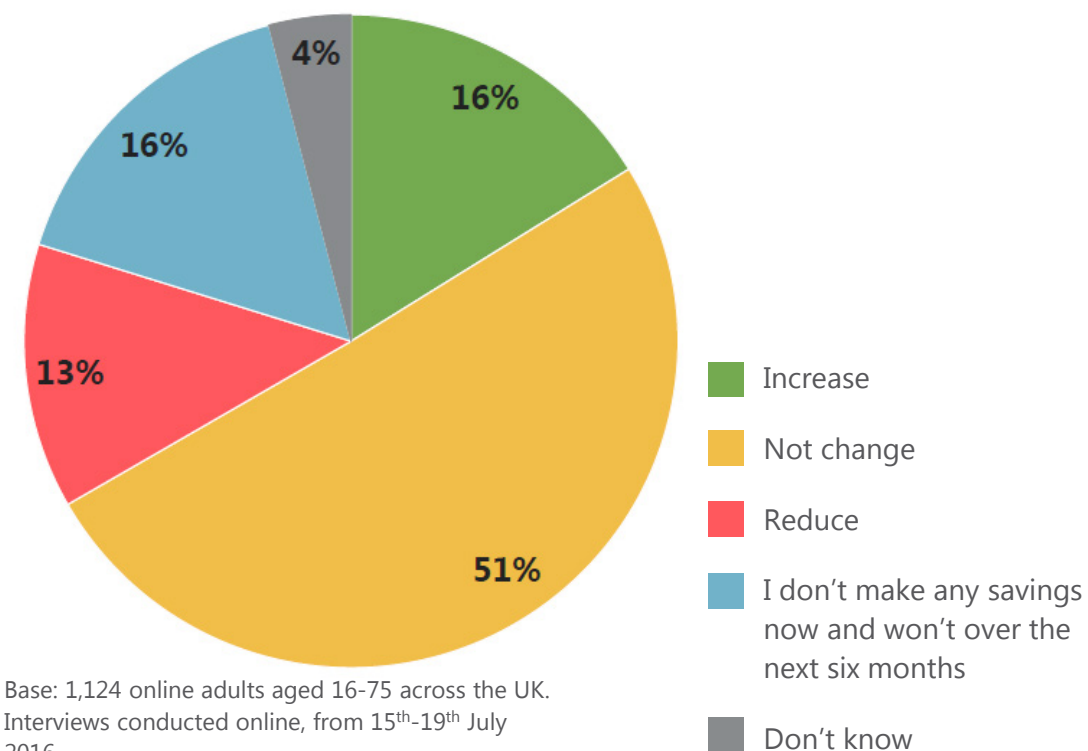
One in ten consumers have opted to delay or abandon a big spending decision because of the EU referendum result, a survey for the Telegraph has found.

Key findings include:

- However, the majority (57%) expect their **personal financial situation will be unchanged** over the next six months.
- Just over a quarter (26%) had been planning a big spending commitment, such as a holiday, car or house move for the coming six months.
- Of those, 16% have decided to go ahead with the purchase as planned, but 5% have decided to delay and another 5% have decided not to continue at all.
- Half (50%) have no plans to change the amount of their income they put into savings over the next six months – and as many plan to increase the amount they're saving (16%) as reduce it (13%).

[Read more ...](#)

Over the next six months, do you expect to increase the amount of your income you put into savings, reduce the amount you put into savings, or will it not change?



Base: 1,124 online adults aged 16-75 across the UK.
Interviews conducted online, from 15th-19th July 2016

SOCIETY



GLOBAL STUDY SHOWS MANY AROUND THE WORLD UNCOMFORTABLE WITH LEVELS OF IMMIGRATION



A major new Ipsos survey across 22 countries worldwide provides an insight into attitudes to immigration and the refugee crisis.

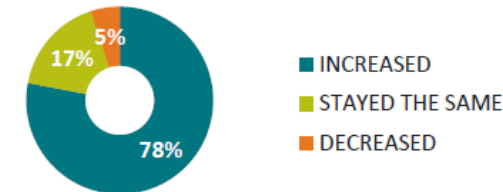
Key findings include:

- **Overall attitudes to immigration tend to be negative.** Nearly every country believes immigration has risen over the last five years, and on average half believe there is too much immigration in their country.
- **People are most concerned about the impact of immigration on public services in their country.** In most of the countries surveyed, a majority think immigration has placed too much pressure on public services, and people are split on the economic benefits of immigration.
- **4 in 10 want to close borders to refugees, and 6 in 10 think terrorists are pretending to be refugees.** As the refugee crisis continues, the findings also show that a large minority want to close borders entirely – and there are widespread concerns throughout the world about terrorists pretending to be refugees, integration of refugees, and doubts that many seeking refuge are genuine.

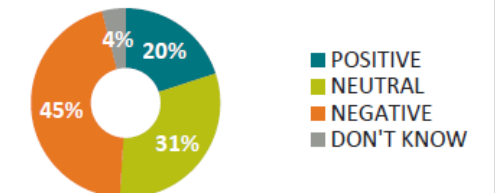
[Read more ...](#)

Overall attitudes to immigration: general belief it is increasing, with negative consequences

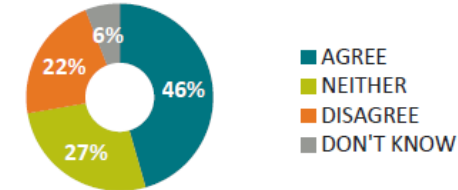
Over the last 5 years, in your opinion has the amount of migrants in your country...



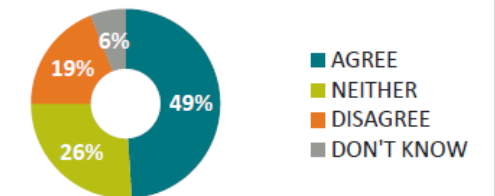
Would you say that immigration has generally had a positive or negative impact on your country?



"Immigration is causing my country to change in ways that I don't like"



"There are too many immigrants in our country"



Base: 16,040 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., July 2016

WORKING FAMILIES WITHOUT ENOUGH MONEY TO AFFORD FOOD



Frank Field MP, Chair of the All-Party Parliamentary Group on Hunger, asked Ipsos MORI to survey British adults on how often they and their household do not have enough money to buy food.

The results of the survey show:

- Every week, 3% of people in work **find themselves and their household without enough money to afford food.**
- Every few weeks, an additional 1% of people in work find themselves and their household without enough money to afford food.
- Every few months, an additional 4% of people in work find themselves and their household without enough money to afford food.

The survey also finds that workers on **zero-hours contracts** are more likely to not have enough money to buy food.

[Read more ...](#)



ETHNOGRAPHY: AN UNFILTERED VIEW OF REALITY



Originally used as a method to understand tribes or cultures in distant lands, today ethnography is applied to any culture including our own.

Ethnography is a research method made for investigating cultural practices, rituals, consumer behaviour, routines and social norms. It helps our clients identify previously unseen opportunities through looking at people's worlds in a new way, putting behaviour at the heart of our investigation.

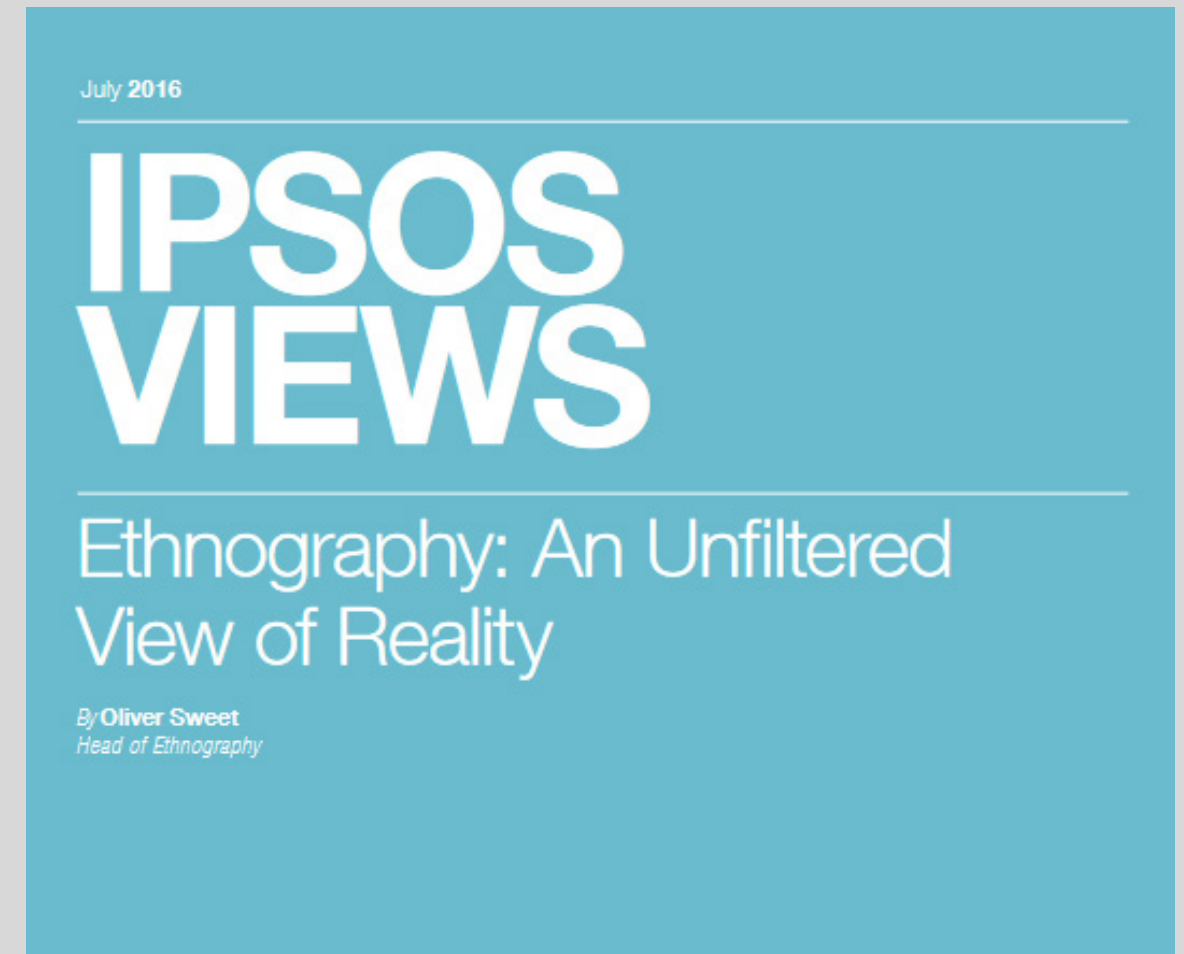
In this new Ipsos Views white paper, we **go back to basics** with Oli Sweet presenting a practical guide to the subject area.

He covers:

1. What makes ethnography, ethnography
2. The case of identity theft: What isn't ethnography
3. Decision-making based on ethnographic insight

The emphasis is on putting investigative fieldwork at the heart of our approach to ethnography, along with rigorous analyses derived from anthropological research.

[Read more ...](#)



HOUSING



Ipsos MORI



NEW SURVEY FINDS HOMES WITH ACCESS FEATURES HAVE WIDE APPEAL AMONG THE PUBLIC



While the overwhelming majority of the public (84%) say they are satisfied with their current home, the latest Ipsos MORI survey conducted for Habinteg and Papworth Trust found that disabled people are more likely than the public at large, to say they are dissatisfied – 14% compared to 9% of the public overall.

Key findings include:

- Half of the public say they would most favour remaining in their current property with some adaptations being made to allow independent living.
- A fifth of the public (19%) say they would most favour moving to a different property specifically designed or adapted to **enable independent living**.
- A significant minority indicate in-principle interest in living in **inclusive accessible housing schemes** including 38% who say they would be interested in living in a scheme for disabled and non-disabled people of a similar age and 35% who say they would be interested in living in a scheme for disabled and non-disabled people of any age.
- Fewer than one in ten of the public (6%) say they would most favour moving to accessible accommodation offering specialist care and support (such as sheltered, supported, nursing or residential accommodation).

[Read more ...](#)



ECONOMY & BUSINESS



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ECONOMIC OPTIMISM RETURNS TO PRE-BREXIT LEVELS



Britons are less pessimistic about the economy than they were in July, according to the latest Ipsos MORI Political Monitor

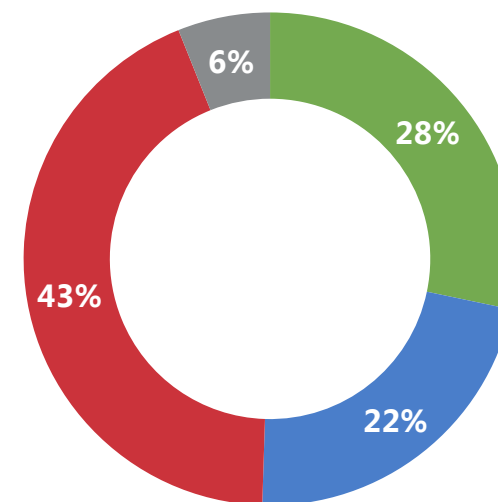
Key findings include:

- Last month, the first Economic Optimism Index (EOI) after the Brexit vote showed the highest level of pessimism for four years, but this has receded in August (although it is still negative on balance).
- Those saying the economy will get worse over the next 12 months has fallen from 57% to 43%, while those saying it will improve increased from 23% to 28% - leaving an overall Economic Optimism Index score of -15, similar to the position at the beginning of 2016.
- The poll also reveals that one in five (21%) feel more confident about the prospects of their personal finances over the next five years in the face of Brexit compared with two in five (42%) who feel less confident.

[Read more ...](#)

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?

August 2016



IMPROVE	28%
STAY THE SAME	22%
GET WORSE	43%
DON'T KNOW	6%

EOI = -15

Base: 1,017 British adults 18+, 13th – 15th August 2016

DOING THE RIGHT THING



A checklist for successful corporate sustainability programmes.

This new **Ipsos Views white paper** from our Global Reputation Centre explores the benefits corporate sustainability programmes can have on both the business and the wider community - provided they are well thought through.

In addition to delivering a **reputational boost**, carefully designed actions can strengthen the long-term viability of the *corporate value chain*, increase employee engagement, and improve relationships with special interest groups.

Ipsos has 20 years' experience helping companies to shape their social responsibility and sustainability programs. Our research has demonstrated that effective engagement requires addressing the authenticity, credibility, and effectiveness of these programs - from both an internal and external perspective.

[Read more ...](#)



MEDIA BRANDS & COMMUNIATIONS



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SIDE-BY-SIDE SOCIAL INTELLIGENCE



As people's lives become increasingly social, social data is a rich source of insight for understanding people. By adding structure to unstructured conversations, we can quantify and robustly integrate with other data sources to drive value from social media.

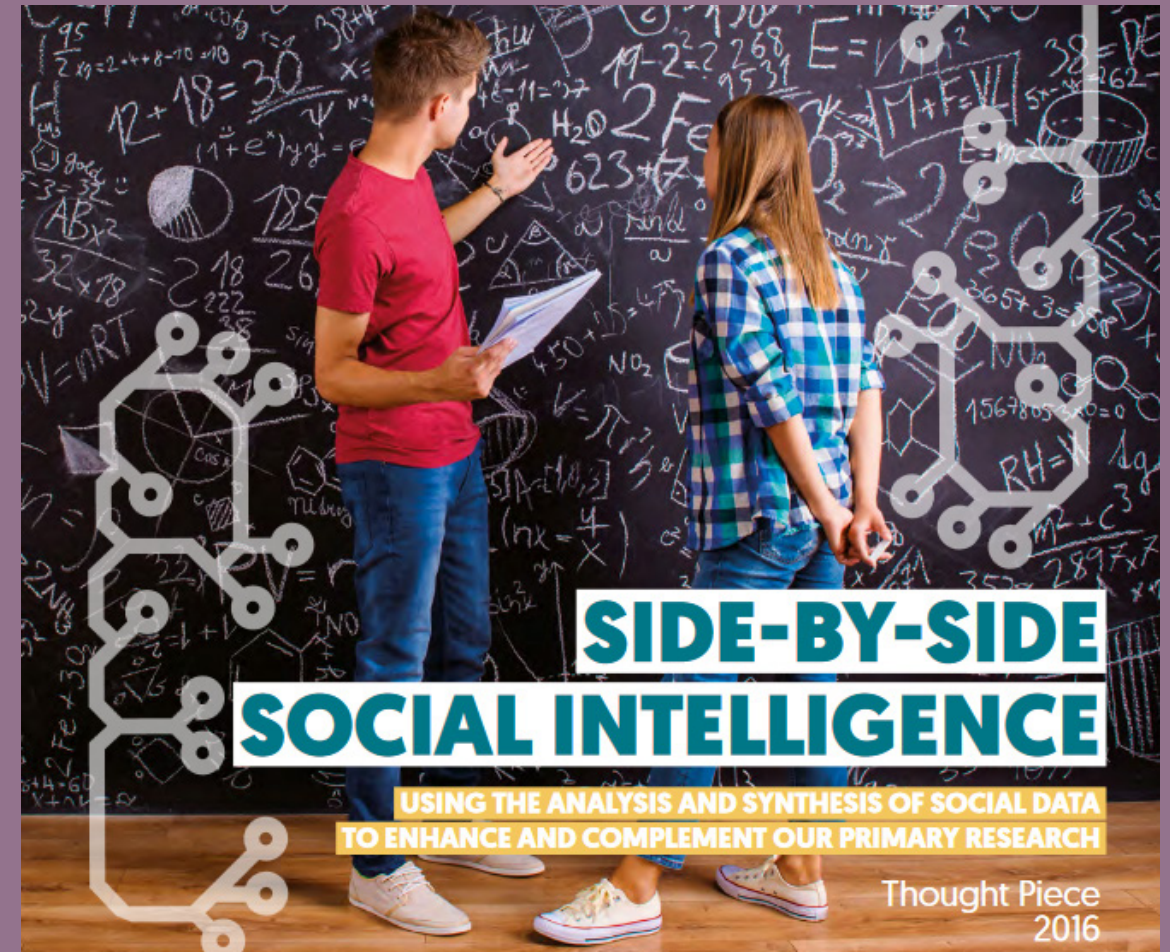
We live in a digital world where mobile technology allows us to spend more and more time on social media. According to **Ipsos Connect's Tech Tracker, Q2 2016**, using social media is the second most popular activity, after using email, on smartphones in Great Britain.

This proliferation of social media activity yields a huge amount of rich, unprompted and unstructured data, generated in real time.

19% of people in Great Britain said one of their **main reasons for social networking in the last month was to give their opinion** (Ipsos MORI, Global Trends 2014). And some of these opinions are about brands. This data, along with other online brand interactions and behaviours can be of great value to marketers.

To find out more about **social intelligence** and what this means for brands see the link below.

[Read more ...](#)



AUDIENCE MEASUREMENT IN THE DATA AGE



Media audience measurement is in robust health. Worth \$7 billion in 2014, according to ESOMAR, it represented 16% of market research spending.

The ways in which people access content are changing fast and the methods we use to identify and track the audiences are changing in order to keep pace.

In this **new Ipsos Views white paper, Andrew Green** outlines 10 predictions for the future of audience measurement. These predictions are informed by our ongoing conversations with audience measurement stakeholders and users around the world. They include how:

- panels will remain paramount
- out-of-home measurement will be enriched by mobile phone 'Big Data'
- new cross-platform metrics will emerge

[Read more ...](#)



ONLINE CONTROL IN THE ERA OF AD BLOCKING



Ipsos was engaged by Facebook to conduct multi-method, multi-market research to understand more about ad blocking and personalisation expectations among consumers.

Ad blocking has become one of the challenges of the day for online publishers with their ease of access and growth in popularity. The discussion around how best to deal with the challenges publishers face remains an ongoing one. Additionally, consumers can be driven to use ad blockers in an attempt to improve their online ad experience.

The **rise of ad blocking** is a clear signal to the ad industry that consumers are dissatisfied with their current experiences.

The **main reasons cited** for using ad blockers include:

- avoiding disruptive ads (69%)
- ads that slow down their browsing experience (58%)
- security / malware risks (56%).

[Read more ...](#)



INTERNATIONAL



Ipsos MORI



IPSOS/REUTERS POLL: CORE POLITICAL APPROVAL



After a couple of tough weeks for Donald Trump, it seems that his sagging numbers have stabilized. Nevertheless, Trump's camp is still going through tumultuous times with a campaign overhaul hoping to shift the current momentum of the race.

Key findings include:

- Clinton's lead over Trump has slightly declined since last week. Among **likely voters**, Clinton leads by 5 points (41% Clinton to 36% Trump), down from 6 points last week.
 - Among **registered voters**, Clinton leads by 8 points (41% Clinton to 33% Trump), down from 9 points last week.
- In the 4-way ballot including **Libertarian Gary Johnson and Green Jill Stein**, the overall picture is relatively similar to the 2-way ballot: Hillary Clinton leads among **likely voters** by four points (39% Clinton to 35% Trump to 7% Johnson to 2% Stein) and 8 points among **registered voters** (40% Clinton to 32% Trump to 9% Johnson to 3% Stein).

[Read more ...](#)

If the 2016 presidential election were being held today and the candidates were as below, for whom would you vote? (Asked of registered voters, n=1,354 and likely voters, n=1,049)

	Likely Voters (LV)	Democrats (LV)	Republicans (LV)	Independents (LV)
Hillary Clinton (Democrat)	41%	82%	5%	20%
Donald Trump (Republican)	36%	6%	72%	37%
Other	10%	5%	11%	22%
Wouldn't Vote	4%	3%	2%	10%
Don't know / Refused	9%	4%	9%	12%

Base: 1,607 Americans, August 13th-17th, 2016.



Ipsos MORI

ROCK THE VOTE/USA TODAY MILLENNIAL POLL



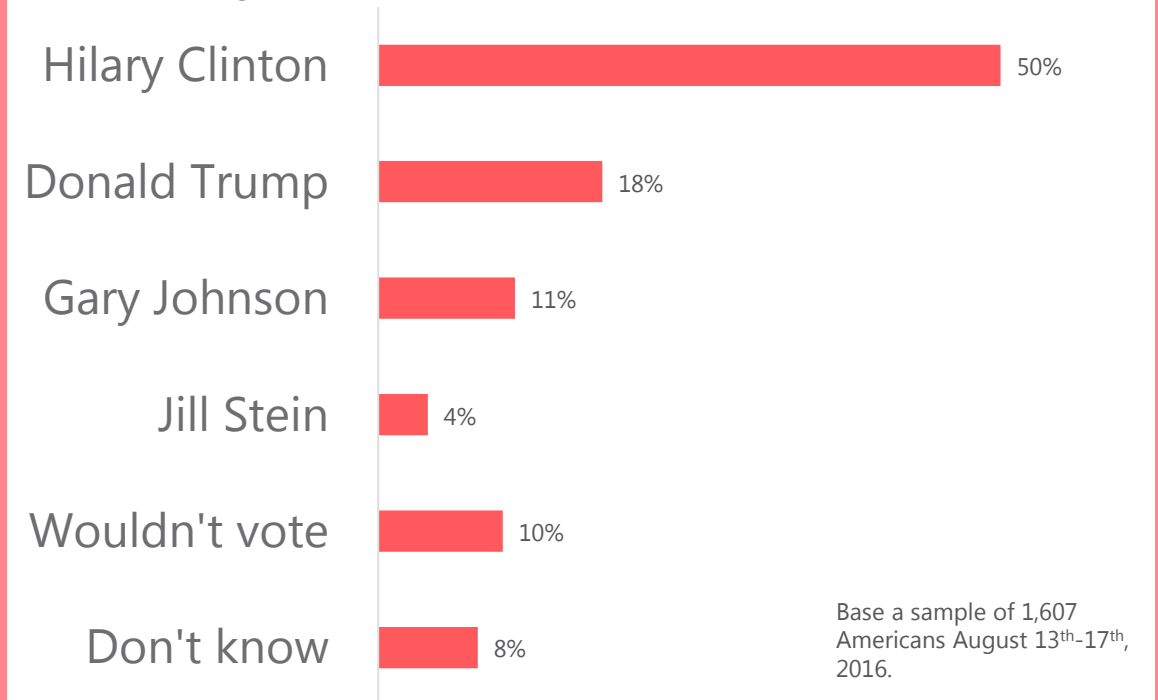
The USA Today/Rock the Vote/Ipsos poll finds great support for Hillary Clinton among under 35s, with more than half (56%) of millennials going for Clinton in the 2-way ballot and only 20% support Trump.

Key findings include:

- In the 4-way ballot (with Stein and Johnson), Clinton still receives support from half of millennials. Stein and Johnson collectively receive about 15% of the millennial vote.
- **People supporting Clinton support her for her experience and to keep Trump out of office.** The #1 reason for Trump voters is to keep Clinton out of the White House.
- 70% of millennials say sexism plays some role in hostility towards Clinton, including more than 1/3 who say it is a major reason.
- After the RNC, millennials generally say Trump seems less Trustworthy, Presidential, Accessible, Human or Credible.

[Read more ...](#)

Ballot Test - How millennials would vote if the election were today on a ballot with third-party candidates



CHINESE FAMILY PARENTING REPORT 2016



Babytree, China's largest and most popular maternal-child service platform, has released the Chinese Family Parenting Report. For the 2016 edition, Babytree worked with Ipsos to produce the report.

Key findings include:

- Nearly half of pregnant mothers were born in the 1990s, a significant increase vs 2014
- The 'maternal crowd' mainly buy maternal-child products via online channels
- More than half already have or plan to have a second child
- Nearly 80% of parent are interested in 'scientific parenting' i.e. education methods, knowledge learning and intelligence building

[Read more ...](#)



AFRICAN YOUTH: PART 2 OF OUR STUDY



Africa has the world's youngest population, with under 25s accounting for 60% of the continent's population.

There are 220 million young people aged 15-24 in Africa. And according to a UNESCO forecast, this figure will rise to 350 million by 2030.

Covering 7 countries – DR Congo, Ivory Coast, Kenya, Morocco, Nigeria, Senegal and South Africa – this report paints a **picture of Africa's 15-24-year-olds**, whether they are currently studying, seeking employment or in full-time employment.

The results of the study show:

- their preferred leisure activity is listening to music
- over 60% of those with internet access use it to go on social media
- their favourite brands are American
- 81% are optimistic about their future

You can also **read part 1 of the report**, an infographic of all the headlines [here](#).

[Read more ...](#)



RUSSIA TRENDVISION: STATE STATISTICS AND CONSUMER TRENDS



Ipsos Comcon has just released its annual overview of Russia's current social and economic situation.

The report looks at the period 2000-2015, covering politics, the economy, population change and consumer behaviour - seeking to highlight future trends.

Produced annually since 2005, the report combines both Russian Federation formal state statistics and Ipsos Comcon's quarterly syndicated study *RosIndex*.

It covers a range of topics. For example:

- Russia has more than 200 ethnic groups
- Consumer income has doubled since 2008 but saw a slump in 2015
- Since 2006, internet penetration has risen from 15% to 70%
- 50% of Russians now own a smartphone

[Read more ...](#)



OPINION



Ipsos MORI





Captains of CX industry: four things your CEO is thinking and what you can do about it

Helen Wilson, MD of Ipsos Loyalty, discusses our annual "Captains of Industry" survey and reflects on what today's business leaders think about customer experience in their own organisations.

[Read more ...](#)

Cheetahs, chickens and goldfish

Speed is good when it comes to customer service and beating competition. But it can sometimes be a mixed blessing, writes **Andrew Green**.

[Read more ...](#)

Is party politics broken?

On 13 July 2016, The Spectator held a discussion on the future of party politics. On the panel were the Spectator's political editor James Forsyth, journalist Sir Simon Jenkins, **Ben Page** and Professor Colleen Graffy, who was US deputy assistant secretary of state in the George W. Bush administration.

[Read more ...](#)



2016/17: the year of disruptive elections

In the wake of the Nice attack, **Brice Teinturer, Ipsos France** has written this update on the current French political climate for The Politics Wire.

[Read more ...](#)

Counting the cost of Brexit: how should financial services adapt to post-referendum Britain?

Paul Stamper, Head of Financial Services, Ipsos MORI, analyses our recent polling on consumer confidence after the Brexit vote and looks at what financial institutions can do to weather the post-referendum storm.

[Read more ...](#)

The labours of Labour

A special guest blog by **Professor David Cowling** on the electability of Labour under Jeremy Corbyn.

[Read more ...](#)



Can't beat them? ...then copy them!

Richard Garnham, Innovation Manager, Ipsos MORI, looks at what the new Instagram stories feature will mean for brands, and the platform's competitors like Snapchat.

[Read more ...](#)

A tipping point for banking?

Following the recent Open Banking reforms announced by the Competition and Markets Authority, **Callum Watling** writes about how new technologies are reshaping the banking landscape and changing the way consumers interact with money.

[Read more ...](#)

Ipsos "intend to lead the AI charge in market research" says Robert Kettrick

Rob Kettrick, Associate Director, Ipsos Loyalty, talks to AI Business about real-time customer feedback and Ipsos's ambitions for the use of AI.

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CONTACT US



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

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All methodological details are available via the website links



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