



# IPSOS MORI HIGHLIGHTS

**Brexit Special**

**July 2016**

- Economic confidence falls to -34%, lowest since 2012
- 89% say would not vote differently
- Retail footfall down 2% on June
- 55% say Theresa May has what it takes to be a good Prime Minister



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# WELCOME TO THE WORLD OF BREXIT

As the dust settles on the EU Referendum, and a UK political earthquake, there is rising uncertainty and anxiety about the future. Consumer confidence has fallen to its lowest point since 2012 in our July Economic Optimism Index, and retail footfall is also down. Concern about Europe has shot up following the referendum rising by 10 percentage points. Ironically it has taken voting to leave the EU to raise it as an issue for the public.

Despite the shock of Britain's elite at the narrow Leave victory (and our own surprise that our prediction of a 26% probability of Brexit happened), Britain remains divided. There is no sense of "buyers' remorse": 89% of both Leave and Remain voters say they would not vote in differently. Leave voters put controlling immigration above access to the single market. This highlights the challenges facing the new Prime Minister, who starts – as most new PMs do – with the majority of the public giving her the benefit of the doubt. What Theresa May will find comforting is that, while worried about the short term, 55% now expect the economy will improve in 10-20 years time as a result of Brexit.

Mrs May is helped politically by a Labour party in chaos: 64% think it should change its leader – including most Labour voters.

We are now tracking pan European attitudes to the Brexit aftermath, and I'll report on this next month.

Apart from Brexit we look at the impact of rising wages on employers – with firms cutting profits in response to the new Living Wage, and in the world of branded communications, how to capture attention, in the few seconds you have in online advertising.

We look at how doctors are rated by over a million patients – satisfaction remains high, but concerns over access are growing. Finally, with the launch of the Intergenerational Fairness Commission, we look at how young people's housing hopes have been dashed. While they voted against Brexit, it may make housing cheaper – if asset prices fall.

We'll keep tracking all this: for more please get in touch!

**Ben Page**  
Chief Executive, Ipsos MORI  
[ben.page@ipsos.com](mailto:ben.page@ipsos.com)



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# IPSOS MORI JULY HIGHLIGHTS

## ECONOMY & BREXIT

- Economic optimism falls post Brexit vote
- Issues Index – Concern about immigration rises as EU vote approaches
- Two in three say Labour should change leader before next General Election
- Over half say Theresa May has what it takes to be a good PM
- Britain remains split as 9 in ten say they would not change their referendum vote

## SOCIETY

- Attitudes towards same-sex marriage in Northern Ireland
- Holiday Barometer
- Employers' response to introduction of National Living wage
- Is the behavioural lens out of focus?

## HEALTH

- Latest GP Patient Survey results released

## HOUSING

- Social mobility stalls as housing dreams are dashed

## MEDIA, BRANDS & COMMUNICATIONS

- The Future of Creativity: Optimising for platform
- Survey finds VR needs to overcome its image problem
- The selfie generation
- It's a mad, mad, madtech world
- Cracking social

## INTERNATIONAL

- Pulso Brasil – as economy stalls, how are Brazilians coping?
- Political Instability

## IPSOS MORI OPINION



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# ECONOMY AND BREXIT





# ECONOMIC OPTIMISM FALLS POST BREXIT VOTE



The latest Political Monitor found that the Economic Optimism Index has fallen to its lowest level since January 2012 and Britons think Brexit will be worse for economy in the short-term, but better in the long term.

Key findings include:

- Nearly six in ten worry Britain's general economic condition will get worse over the next 12 months (57%, up 28 points since last month's 29%)
- This gives an Ipsos MORI Economic Optimism Index (% better minus % worse) of -34, compared with -10 in June.
- Half think it will be worse for Britain's economy over the next five years (49%, vs 38% thinking it will be better), but this switches over for the longer term – 55% think it will be better for Britain's economy over the next ten-twenty years, while 24% think it will be worse. -10 in June.
- Half (49%) expect less EU immigration than if UK had voted to stay, but only 30% think it will reduce immigration from rest of world.



# ISSUES INDEX – CONCERN ABOUT IMMIGRATION RISES AS EU VOTE APPROACHES



The June 2016 Issues Index which was released just ahead of the EU referendum showed concern about immigration had risen by 10 percentage points in the Issues Index; and the NHS, EU and Economy had also risen in importance

Key findings include:

- The proportion who see the EU as an important issue is now at 32% - however both the NHS (37%) and immigration (48%) remain bigger issues overall.
- Notably, concern with immigration has risen by ten percentage points since the May Index, when concern stood at 38%.

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# TWO IN THREE SAY LABOUR SHOULD CHANGE LEADER BEFORE NEXT GENERAL ELECTION



**Two in three (66%) of the British public think that the Labour Party should change its leader before the next General Election in 2020, according to the July Political Monitor.**

Key findings include:

- This is up from 42% in October last year, and includes a majority of Labour voters (54%, vs 41% disagree).
- Neither Corbyn nor Eagle convince the public they have what it takes to be a good PM
- When asked if they have what it takes to be a good Prime Minister, only around one in five are convinced by the current Labour leader, Jeremy Corbyn, or his challenger, Angela Eagle.
- 23% agree that Jeremy Corbyn has what it takes to be a good PM, and 68% disagree (this compares with Theresa May's figures of 55% thinking she has what it takes and 27% disagreeing).
- Angela Eagle's ratings are also on balance negative among the public at large (although many - 24% - say they don't know), but she also has a net negative rating among current Labour voters.



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# OVER HALF SAY THERESA MAY HAS WHAT IT TAKES TO BE A GOOD PM



**July 2016 Political Monitor reveals that over half (55%) believe that Theresa May has what it takes to be a good Prime Minister, up from 28% in July 2015.**

Key findings include:

- Theresa May's ratings are particularly high among Conservative voters, among whom 81% think she has what it takes.
- Her ratings are also well ahead of those for Andrea Leadsom and Boris Johnson. Johnson's ratings have fallen since last year – now 70% disagree he has what it takes, up from 52% last July.
- On his final day in office, David Cameron's satisfaction ratings as Prime Minister have fallen to his lowest ever. His net rating of -38 is comparable with public views of Gordon Brown in 2009.
- Jeremy Corbyn's ratings have also fallen to their lowest since he was elected.
- Voting intentions are little changed over the month, with headline figures of the Conservatives at 36%, Labour 35%, the Liberal Democrats at 11% and the UK Independence Party at 8%.

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# BRITAIN REMAINS SPLIT AS 9 IN TEN SAY THEY WOULD NOT CHANGE THEIR REFERENDUM VOTE



**A post-referendum poll carried out for BBC Newsnight reveals that leave voters and remain voters still hold very opposing views towards the EU referendum result, while very few on either side say they would change their vote if a second referendum were to be held.**

Key findings include:

- 89% of leave voters say that the referendum result was the right decision for the United Kingdom, while exactly the same proportion of remain voters say it was the wrong one.
- Similarly, 80% of leave voters say the result makes them feel more hopeful for the future, but 83% of remain voters say it makes them less hopeful.
- The vast majority of those who said they voted on June 23rd say they would vote the same way in a second referendum – 90% of leave voters and 94% of remain voters.
- Remain voters are marginally more certain that they would not change their mind (85% say they would definitely vote the same way, compared with 79% of leave voters).



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# SOCIETY



# ATTITUDES TOWARDS SAME-SEX MARRIAGE IN NORTHERN IRELAND



One year on from the overwhelming victory for the Yes campaign in the Referendum on same-sex marriage in the Republic of Ireland, the debate on whether this should be legalised in Northern Ireland continues.

A recent poll has found that over two-thirds (70%) of adults in Northern Ireland believe that homosexual couples should be allowed to marry each other. Meanwhile, 22% disagree with the principle.

Over four in five (85%) of 16-34 year olds agree with the principle of same-sex marriage, while those aged 65 and over are less sure (47%).

Four in five (80%) from a Catholic community background agree that homosexual couples should be allowed to marry compared to 60% of those from a Protestant upbringing.



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# HOLIDAY BAROMETER



**What motivates people to go on holiday? When to go, and where? Focusing on people from mainland Europe, the US and Brazil, a number of trends emerge in the 2016 Ipsos/Europ Assistance Barometer.**

In 2016, fewer Europeans are predicted to go on a summer holiday, whereas the number of American and Brazilian holidaymakers appear to be on the rise.

This summer, 57% of French plan to go away, a fall of 6 points from 2015. The trend is similar in other European countries, with the Germans (55%), Spaniards (49%), Italians (52%), Belgians (47%) all less likely to go away than last year. The only exception is Austria with a stable rate compared to 2015 (63%).

Across the Atlantic, the situation appears more positive: Americans and Brazilians have higher rates (61% and 64%), close to the levels seen last year in European countries.

For Germans, Italy is their favourite foreign destination; Belgians look to France for a trip abroad; and Americans favour Mexico.



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# EMPLOYERS' RESPONSE TO INTRODUCTION OF NATIONAL LIVING WAGE



Ipsos MORI was commissioned by the Resolution Foundation to survey employers on how they have responded to the introduction of the National Living Wage (NLW) for their report “The first 100 days”.

The report finds the initial response of employers has been to raise prices or reduce profits rather than cut jobs:

- Of those who say their company has been affected by the NLW, the most common short-term action taken has been to increase prices (36%), followed by taking lower profits (29%).
- One in seven firms say they have already invested more in training (15%), and that one in eight (12%) firms report having invested more in technology.
- Roughly one in seven firms (14%) whose wage bill has increased say they have used fewer workers, offered fewer hours to staff or slowed recruitment. Just one in twelve (8%) say they have reduced aspects of the reward package, such as paid breaks, overtime or Bank Holiday pay.

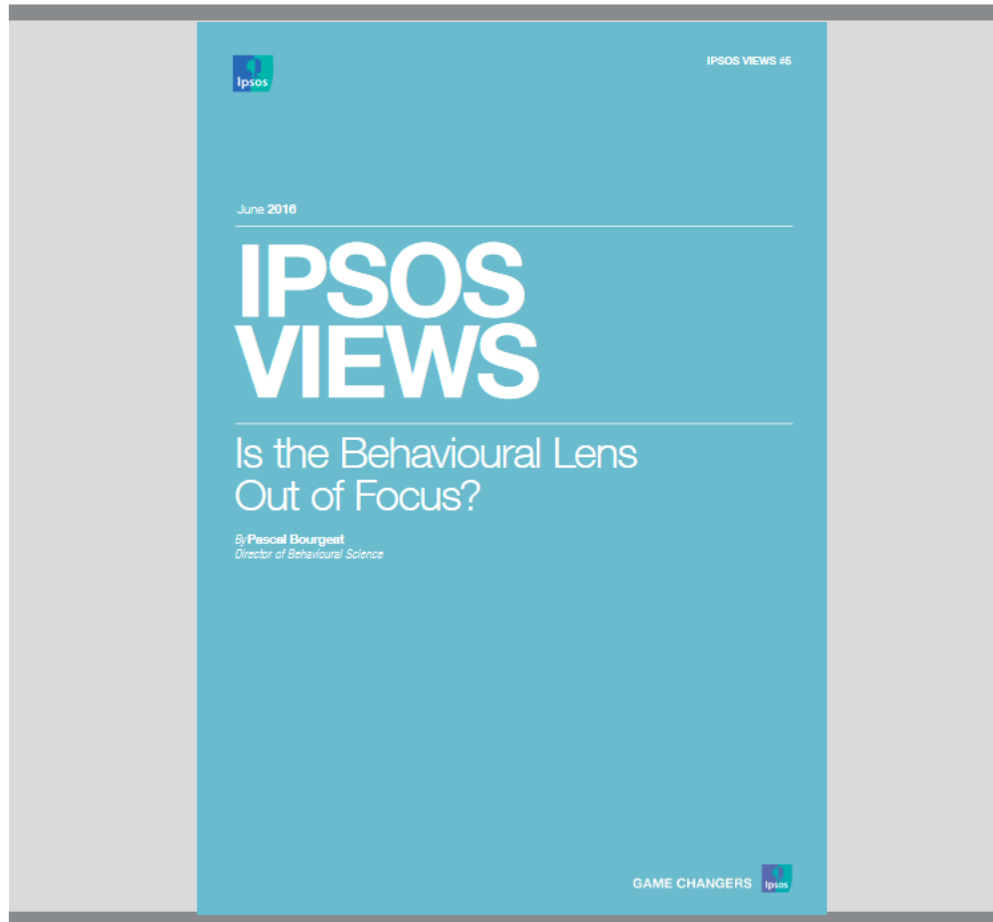


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# IS THE BEHAVIOURAL LENS OUT OF FOCUS?



## How to make behaviour work in CPG, financial services, technology and retail

Before psychologists and neuroscientists came onto the stage, Shakespeare's Hamlet, Prince of Denmark was the best reference to understand our deep dislike of uncertainty and how it shapes our behaviour. Experimental psychology and more recently neuroscience have not replaced Hamlet but they have enriched our view of behaviour, especially behaviour within the context of uncertainty. They have also changed how we look at ourselves as consumers, shoppers, customers or citizens.

In this Ipsos Views paper, Pascal Bourgeat takes the helicopter view of behaviour to show:

- That the lens we use is often out of focus (and why) a simpler and clearer view of how (economic) behaviour works from the overlap of various areas of behavioural science
- Examples from different industry sectors
- It is when we fit most closely around the way consumers, shoppers and customers 'construct decisions' that the creativity in our interventions, actions and campaigns is most effective.

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# HEALTH



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# LATEST GP PATIENT SURVEY RESULTS RELEASED



**The 2016 GP Patient Survey results have now been published.**

Key findings include:

- The majority of patients (85%) have had a good overall experience of their GP surgery
- The vast majority have confidence and trust in their GP (95%) and nurse (97%)
- On the whole (70%) patients find it easy to get through to their practice by phone (although this has dropped from 78% in 2011-12)
- 85% were able to get an appointment last time they tried
- 92% of these found this appointment convenient
- 73% say they had a good experience of making an appointment
- 76% are satisfied with their practice's opening hours. However satisfaction has declined overtime



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# HOUSING



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# SOCIAL MOBILITY STALLS AS HOUSING DREAMS ARE DASHED



**Owner-occupation is the clear tenure of choice for most Britons but they think politicians are not being honest about the prospects for people to own.**

Key findings from the survey include:

- 46% of the view that people have equal opportunities to get ahead in Britain, a drop of seven points since 2008
- 79% agree that even if today's young people work hard and get good jobs, they will have a hard time getting the right kind of housing while a majority, 57%, agree that getting on the property ladder is one of the most important ways of getting on in life (23% disagree).
- The British agree that renting is an important part of the UK's housing mix but over-estimate its size relative to owner-occupation – for example, on average, they think that local authorities and housing associations house 28% of adults, but the real figure is half that.



# MEDIA, BRANDS AND COMMUNICATIONS

# THE FUTURE OF CREATIVITY: OPTIMISING FOR PLATFORM



We are sharing the content from the event **The Future of Creativity**, for anyone who missed the latest in the **Future of Research series**.

On 29 June we held an event to share ideas on how to capitalise on the creative opportunities that different platforms offer while still ensuring you are true to your brand.

Speakers:

- **Christoph Weber**  
UK Snickers Marketing Director, *Mars*
- **Eleanor Thornton-Firkin**  
Head of Content & Creative Development, *Ipsos MORI*
- **Beckie Goodfield**  
Head of Media Research, *Ipsos MORI*

The video of **Eleanor Thornton-Firkin's** presentation is now [available to view here](#).



# SURVEY FINDS VR NEEDS TO OVERCOME ITS IMAGE PROBLEM



**Britons are enthusiastic about the potential of Virtual Reality (VR), but the perception it is only for gamers is a barrier to it becoming mainstream, a new survey published today finds.**

Key findings include:

- Half (52%) say they have a good understanding of virtual reality, (13% strongly agree they have a good understanding) and 47% want to try it out.
- But despite the high awareness of VR, the study shows there are some barriers to widespread adoption. A third (34%) of people said they have no interest at all in the technology and a similar number (36%) think the devices are confusing.
- The study uncovers uncertainty around the applications of VR. Crucially, most people (60%) feel that it is mainly for gamers at the moment, and 46% can't see any practical uses for people like them.



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# THE SELFIE GENERATION



**Ipsos Connect's Tech Tracker is a quarterly, GB nationally representative research survey which measures the emerging trends and developments in technology.**

Key findings include:

- One in five British Adults admit to taking selfies of just themselves, and the same number (20%) take selfies of themselves and others.
- Taking selfies is more prevalent among younger people (64% of 15 to 24 year olds) and particularly young women, seven in ten (68%) of whom take pictures of themselves.
- People in the highest social grades (ABC1) are also more likely to engage in the pose and pout than average, with 25% saying they've taken a picture of themselves and someone else.

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# IT'S A MAD, MAD, MADTECH WORLD



**As the lines between media, advertising and technology blur, marketers, content creators and consumers are changing.**

We now live in a world in which media, advertising, and technology – “MAdtech” – intersect to alter fundamentally how consumers “consume” content.

The key themes of this analysis by Peter Minnium, President of Ipsos Connect in the US, are:

- **MAdtech changes everything**  
The implications for advertising and media are widespread.
- **MAdtech changes nothing**  
It's still all about people.
- **Making sense of Madtech**  
It starts with data and insights.
- **The MAdtech mash-up**  
The walls between advertising, media, and technology have crumbled.



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# CRACKING SOCIAL



As people are spending ever more time on social media, the challenge for brands is making an impact in this space. Brands can learn a lot from influencers who truly understand their audiences and harness their creativity to connect in a meaningful way.

Social and influencer led marketing is complex and measuring success even more challenging. Despite this the influencer market is booming. But how can you make it work for your brand? Brands that want to engage their audiences in the social media space need to behave like all the best content creators.

To be successful brands need to focus on three key areas:

- Think social first
- Cultural capital
- Collaborate

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# INTERNATIONAL



# PULSO BRASIL– AS ECONOMY STALLS, HOW ARE BRAZILIANS COPING?



Every month, Ipsos produces a snapshot on what has been happening in Brazil. Pulso Brasil covers politics, the economy, consumer behaviour and the social agenda.

This month, there are some big issues under consideration:

- With the temporary suspension of President Dilma Rousseff, there is a positive trend regarding the country's direction and the government seems to be moving on. Is this an opportunity for acting President Michel Temer?
- The Consumer Confidence Index has grown by 2 points and there is a gradual rising trend – inflation and unemployment will be the key pillars to confirm this upward movement.
- With 70% of the public in favour of new elections, Michel Temer's disapproval index rose again after two consecutive drops.
- With the impeachment process under way, the country is anxiously awaiting its outcome. What can be expected in the coming months?



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# POLITICAL INSTABILITY



## What do we think of our current governments and political leaders?

In new Global @dvisor research, respondents from 24 countries around the world evaluate their current governments and national leaders.

- Six in 10 (62%) agree that their current national leader and government “should be replaced by someone else”.
- 59% agree their leaders have a “hidden agenda”.
- 54% agree their leaders are “in power for themselves” and not for any other reason.

Ahead of the US Presidential Election later this year, Ipsos has been researching exactly why there is support for the divisive figure of Donald Trump. Cliff Young’s analysis focuses on the importance of nativism, with Trump supporters much more likely to hold strong anti-immigrant beliefs. Meanwhile, a real political earthquake has shaken Italy in the administrative elections, highlighting a real cleavage between people and the elites.

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# IPSOS MORI OPINION



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## 4 ways the anti-immigration vote won the referendum for Brexit

Total control on immigration mattered more to voters than the single market, writes Aalia Khan in the New Statesman.

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## Ladders to social mobility after Brexit

Ben Marshall looks at whether Brexit is a “smell the coffee” moment for a different approach to social mobility and housing tenure.

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## How Project Fear failed to keep Britain in the EU – and the signs that anyone could have read

Gideon Skinner writes in the Telegraph on the 5 signs that revealed Project Fear wasn't working.

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# IPSOS MORI OPINION

## The potential impact of Brexit on UK retail

Tim Dennison, Director of Retail Intelligence at Ipsos Retail Performance, blogs on the potential impact of Brexit on UK retail.

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## Boiling the frog

Andrew Green, Global Head of Audience Solutions at Ipsos Connect, blogs on the inexorable rise of Ad blocking.

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## Newsbrands need to harness VR to keep pace with digital life

News organisations shouldn't wait for YouTube to take over the Virtual Reality space, writes Neil Stevenson, Research Manager, Ipsos Connect in Mediatel.

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# IPSOS MORI OPINION

## We must overcome patients' understandable suspicion about data gathering

Harry Evans writes in the HSJ about the importance of articulating the benefits of sharing health data if public trust is ever to be rebuilt.

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## Never leave a place behind

Ben Page in the Municipal Journal, examines the revival of the inner city & the crucial role local government has played.

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

**James Randall**

Managing Director, Key Clients

[james.randall@ipsos.com](mailto:james.randall@ipsos.com)

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

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