



IPSOS MORI HIGHLIGHTS

June 2016



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WELCOME TO IPSOS MORI'S JUNE HIGHLIGHTS

June finally sees the EU referendum. I'm delighted the campaigning is nearly over. The polls are technically too close to call, but many in the Westminster bubble – and indeed in Britain as a whole - still expect the status quo to prevail this week. The public are split down the middle, but 47% expect Britain to vote to remain in the EU, and 38% to vote leave. We'll know soon enough.

Whatever happens on Thursday, there will be plenty of political action afterwards as both parties deal with the ramifications. One thing is almost certain, Leave or Remain, the next Prime minister will be pro Brexit.

There's lots more on the European Referendum in this month's issue – including an interesting use of Daniel Kahneman's System 1 v System 2 responses to look at which arguments are working.

Elsewhere we look at the Queen's enduring popularity as she turns 90. We delve into immigration, which is

seen as a national but not a personal problem, and as helping the economy but bad for the NHS apparently.

Elsewhere we look at front gardens (yes the British love them) and organ donation (your wishes, not those of your relatives matter) – and more!

Finally - if you are interested in how brands can be creative in their communications, come to our next event on 29th June (invite inside) with Mars and more, where we will look at how to use creativity to get your message across – and incidentally why some of our speakers have millions of followers on social media compared to my own 29,000.

If you haven't yet done it, and are eligible – please vote!

All the best

Ben Page
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IPSOS MORI JUNE HIGHLIGHTS

EVENTS

- Invitation: - The Future of Creativity
- The Future of Money

POLITICS

- Immigration is now the top issue for voters in the EU referendum
- What does our subconscious tell us about Brexit?
- Two thirds of Britons think their standard of living won't be affected by Brexit
- The 'Tinman' referendum: the EU debate in Scotland is lacking heart
- Scots look set to back 'Remain'
- Just one in five Britons say EU immigration has had a negative effect on them personally

ECONOMY & BUSINESS

- Economists' Views on Brexit

SOCIETY

- Economist / Ipsos MORI May 2016 Issues Index
- High satisfaction levels with Royal Family as the Queen turns 90
- Largest ever legal needs survey in England and Wales

MEDIA, BRANDS & COMMUNICATIONS

- High definition customers - a powerful segmentation

HOUSING

- How green are British front gardens?
- Conducting surveys of tenants and service users – a guide

IPSOS MORI OPINION



INVITATION – THE FUTURE OF CREATIVITY



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THE
FUTURE 2016
OF RESEARCH
SERIES



Creativity is as important as ever, but as the media landscape has fragmented and consumers encounter brands through ever more touchpoints it has to be designed for the context in which it's delivered to truly excel.

Join us on 29 June when our speakers will 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, Snickers Brand Director, **Mars**
Eleanor Thornton-Firkin, Head of Content & Creative Development, **Ipsos Connect**

Beckie Goodfield, Head of Media Research **Ipsos Connect**.

We will also hear **live** from some of the UK's leading social influencers and experts.

[Read more >>>](#)



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THE FUTURE OF MONEY



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**THE FUTURE 2016
OF RESEARCH
SERIES**



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

On 25 May, our panel of experts from across the industry discussed how they are adapting to the future of money.

Speakers:

Catherine McGrath

Managing Director, Transactions, Insurance & Mass Market, **Barclays Bank**

Mark Oakes

Head of Communications, Corporate Affairs Division, **Financial Services Compensation Scheme**

Alison Sagar

Marketing Director, **PayPal UK & Ireland**

Paul Stamper

Head of Financial Services, **Ipsos MORI**

The slides from this event are now available via the link below.

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POLITICS



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IMMIGRATION IS NOW THE TOP ISSUE FOR VOTERS IN THE EU REFERENDUM



Our poll from a week before the referendum on Britain's membership of the European Union, found Leave with a lead over Remain.

Key findings include:

- Immigration overtook the economy becoming the most important issue for voters.
- As we have seen in previous months, young people are much more in favour of remaining than older people (around six in ten 18-34s would vote to remain, around six in ten of those aged 55+ would vote to leave), and social classes ABC1 are more in favour of staying in the EU than those in classes C2DE.
- Despite Leave leading the survey, more voters expected a Remain win this week (47%)



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WHAT DOES OUR SUBCONSCIOUS TELL US ABOUT BREXIT?



Leave supporters display a surprisingly high level of conviction that Brexit would be good for the economy but are some paying lip service to the campaign's key message on reducing immigration?

We have used a technique called Implicit Reaction Time, which measures how quickly people express an opinion, to assess the strength of people's feelings towards leaving or staying in the EU and areas of weak association that may indicate differences between what people "say" and "how" they will vote.

Key findings include:

- Leave voters are just as convinced that leaving will be better for the economy as remain voters are that staying will be better.
- Neither side is sure that leaving will reduce immigration.
- Despite their best efforts, neither campaign is owning the debate on personal impact.

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THE PERILS OF PERCEPTION AND THE EU



New research by UK in a Changing Europe and Ipsos MORI shows the public have a number of significant misperceptions about the EU and how it affects life in the UK.

Some of the key things we get wrong (and right) are:

- **EU immigrants:** we massively overestimate how many EU-born people now live in the UK. On average we think EU citizens make up 15% of the total UK population (which would be around 10.5m people), when in reality it's 5% (around 3.5m people).
- **Proportion of immigrants who were born in an EU country:** but at the same time we underestimate the proportion of all immigrants who were born in the EU.



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TWO THIRDS OF BRITONS THINK THEIR STANDARD OF LIVING WON'T BE AFFECTED BY BREXIT



The public is not optimistic about levels of EU investment in the UK or its ability to export to the EU over the next five years if Britain votes to leave the EU in the referendum.

Key findings include:

- The latest wave finds the economic arguments seem to have taken hold with the public; a majority (56%) think direct investment into the UK from the EU will fall over the next five years if Britain leaves the EU.
- Only one in twenty (5%) think that EU investment will increase and three in ten (29%) think it will stay the same.
- There is uncertainty about the impact on unemployment if Britain leaves the EU. Three in ten (29%) think unemployment will increase compared with one in four (25%) who think it will fall, while over a third (36%) think unemployment levels will stay the same.

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SCOTS LOOK SET TO BACK 'REMAIN'



In the final week of campaigning ahead of the referendum on the UK's membership of the EU, polling suggests that the majority of Scots will back the campaign to retain membership.

- Among those who are likely to vote, 58% would vote for the UK to stay in the EU while 33% support Brexit and 8% are undecided.
- Once we have removed undecided voters, 64% back Remain and 36% Brexit.
- But while there is consistent scepticism about the impact of a possible Brexit, Scots are split on whether a UK vote to leave the EU, when Scots vote to stay in, should trigger a second independence referendum.
- In this scenario, 47% agree that there should be an indyref2 within two years while 45% disagree.

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THE 'TINMAN' REFERENDUM: THE EU DEBATE IN SCOTLAND IS LACKING HEART



In Scotland the polls show a clear and consistent lead for those who want to remain in the EU. But the polls do not analyse or explain the deep-seated attitudes of Scots, or how important this referendum is for them and for the country's future.

We identified some key factors which are shaping our attitudes, such as:

- A vote to 'Remain' will not be made with much conviction
- The rest of the campaign may still change many minds
- The EU referendum is lower key and less important than indyref
- The question of indyref2 is not a major influence on voters' thinking
- Scots don't identify with the EU or see themselves as European

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JUST ONE IN FIVE BRITONS SAY EU IMMIGRATION HAS HAD A NEGATIVE EFFECT ON THEM PERSONALLY



As polling day approaches, new research finds the public is divided when it comes to how EU immigration has affected Britain; despite relatively few saying it has had a negative impact on their own life.

Brits are evenly split on whether EU immigration has been good or bad for Britain overall.

Key findings include:

- More (46%) think EU immigration has been good rather than bad (30%) for the economy, but over half (55%) say it has had a negative effect on the NHS.
- Half say immigration has had no impact on their own area, while a quarter say it has had a positive impact and the same say it has had a negative impact.
- Strikingly, people aged 18 to 34 are twice as likely as those aged over 55 to think EU immigration has been good for Britain (50% compared with 25%).



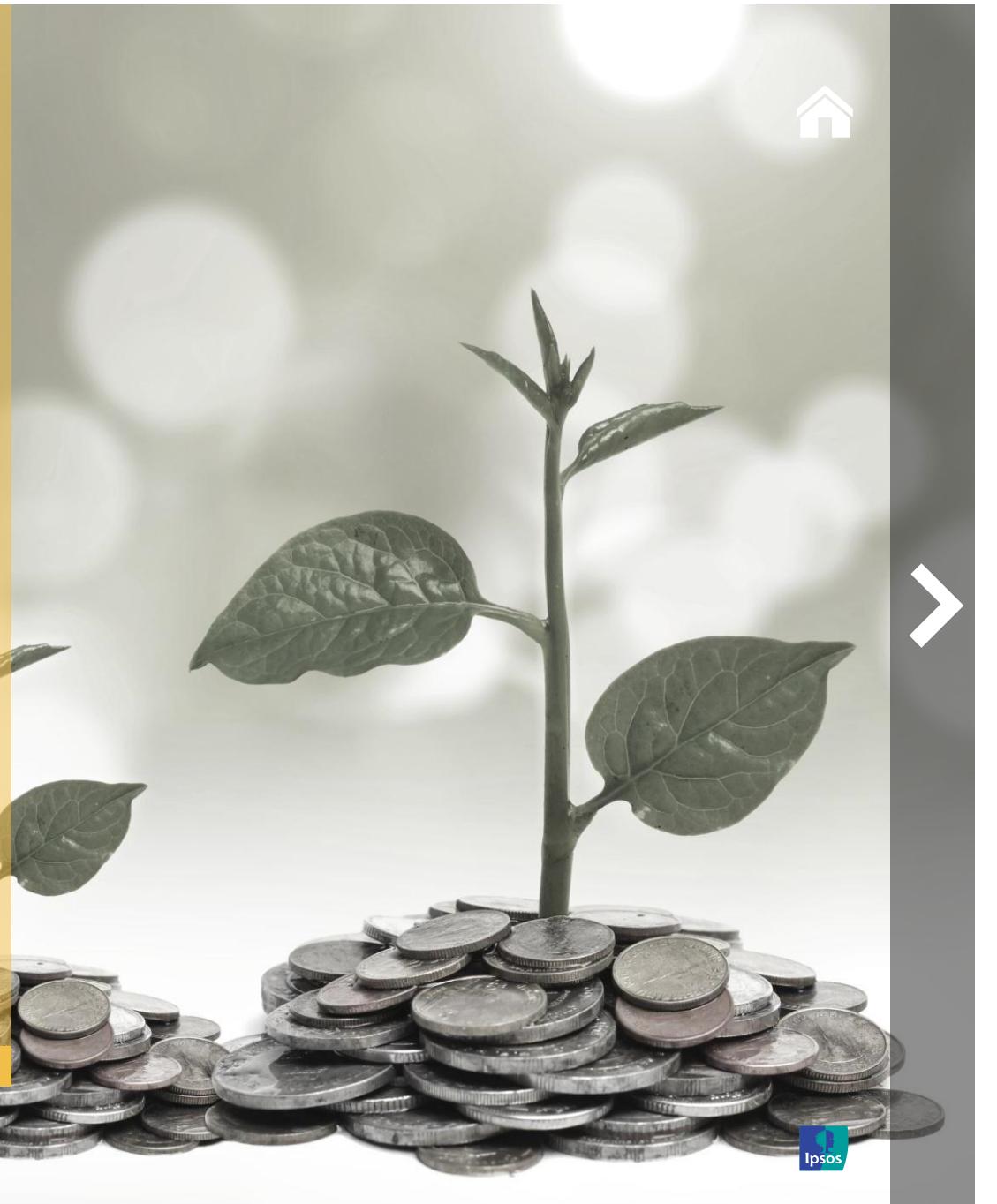
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ECONOMY AND BUSINESS



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ECONOMISTS' VIEWS ON BREXIT



Ipsos MORI conducted an online survey of members of the Royal Economic Society and the Society of Business Economists on behalf of the Observer.

Key findings include:

- 72% thought the most likely outcome would be a negative impact on UK real GDP over the next 10 to 20 years, if the UK left the EU and the single market.
- This compares with 11% who thought that a positive impact on real GDP would be the most likely outcome.
- 88% thought it most likely that real GDP would be negatively impacted in the next 5 years, if the UK left the EU and the single market. 4% thought GDP would be positively impacted over the same time period and the 7% thought GDP would be broadly unaffected.

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SOCIETY



ECONOMIST / IPSOS MORI MAY 2016 ISSUES INDEX



With the impending EU Referendum, the Ipsos MORI Issues Index shows concern about the EU remains in third place.

The index shows that the proportion of the British public who consider the EU an important issue facing Britain has plateaued, remaining at the same level as that recorded in April.

Just under three in ten (28%) say the EU is a concern, compared to 30% last month – although this score remains much higher than the average over the past decade.

The EU remains the third-biggest issue facing Britain, after immigration and the NHS. Concern about the NHS has fallen; at 33% this month it is down six percentage points from the proportion recorded in April.

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HIGH SATISFACTION LEVELS WITH ROYAL FAMILY AS THE QUEEN TURNS 90



New polling released as the Queen turns 90 reveals that key members of the Royal Family continue to receive high satisfaction ratings from the public.

When asked how they feel about the way the Queen is doing her job as Monarch 86% are satisfied, and 5% are dissatisfied - giving a net rating of +81.

Prince William, though second in line to the throne, receives the second highest satisfaction levels with 76% satisfied, and 6% dissatisfied (net +73).

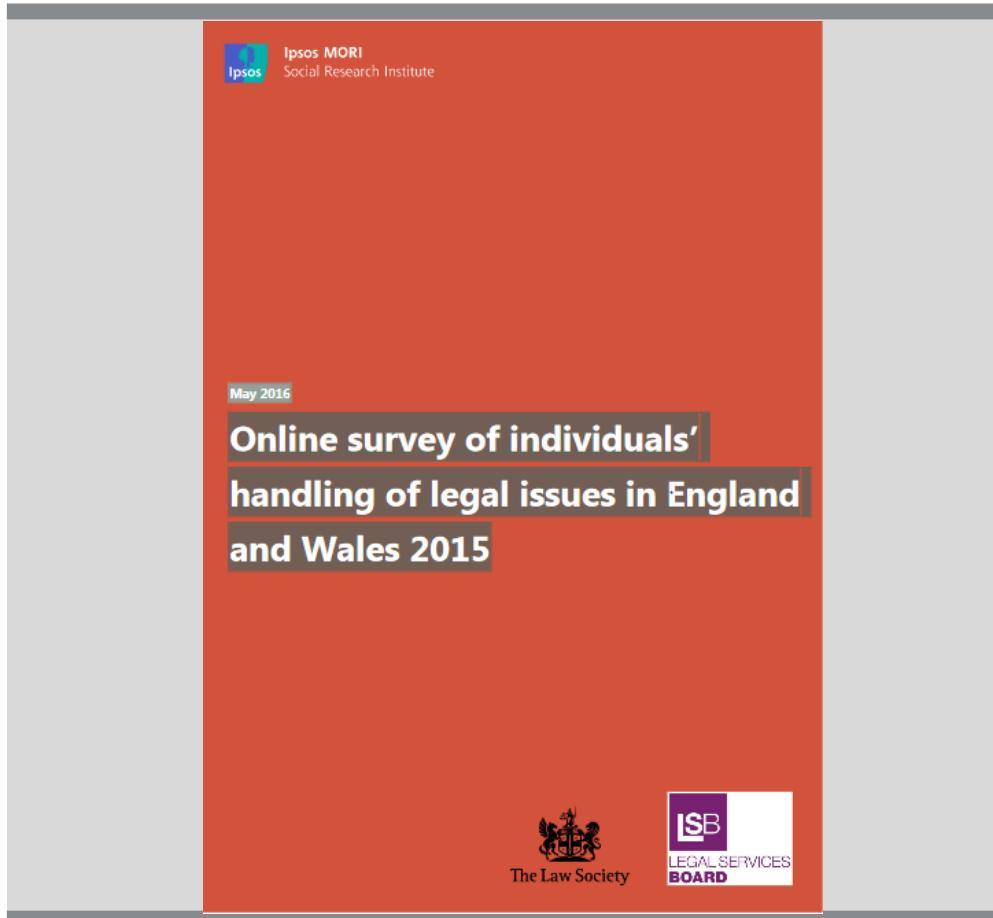
Prince Charles has 71% satisfied, and 11% are dissatisfied - giving a net satisfaction rating of +60.

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LARGEST EVER LEGAL NEEDS SURVEY IN ENGLAND AND WALES



This large-scale Ipsos MORI survey of over 8,000 participants provides insight into people's experiences of over 16,000 legal issues.

Key findings are:

- Just over half (54%) of adults screened online experienced one of 29 legal issues in the three year period before completing the survey.
- Experience of multiple issues was common among respondents with almost two thirds (63%) experiencing more than one issue.
- Most issues were not initially considered to be 'legal' in character with only 25% of all issues seen as legal upon the outset of the issue.
- Awareness of providers of legal services varied as did prior experience and knowledge about the availability of legal aid for particular issues.

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HEALTH



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WISHES OF ORGAN DONORS SHOULD TAKE PRIORITY OVER WISHES OF THEIR FAMILIES, PUBLIC SAYS



The vast majority of the British public think that the wishes of somebody wants to become an organ donor after their death should be followed, even if their family disagrees, according to a new opinion poll.

- At present, NHS doctors will not use organs if the potential donor's next of kin objects, even though the law allows the doctors to do so.
- Asked if the family "should or should not be able to block the use of organs from an adult who had agreed to be a donor before they died", 88% said the family should not be able to block their use and only 9% that they should.
- When the question asked if "doctors should or should not respect the wishes of the family", 82% said that they should not, compared to 14% who thought they should.

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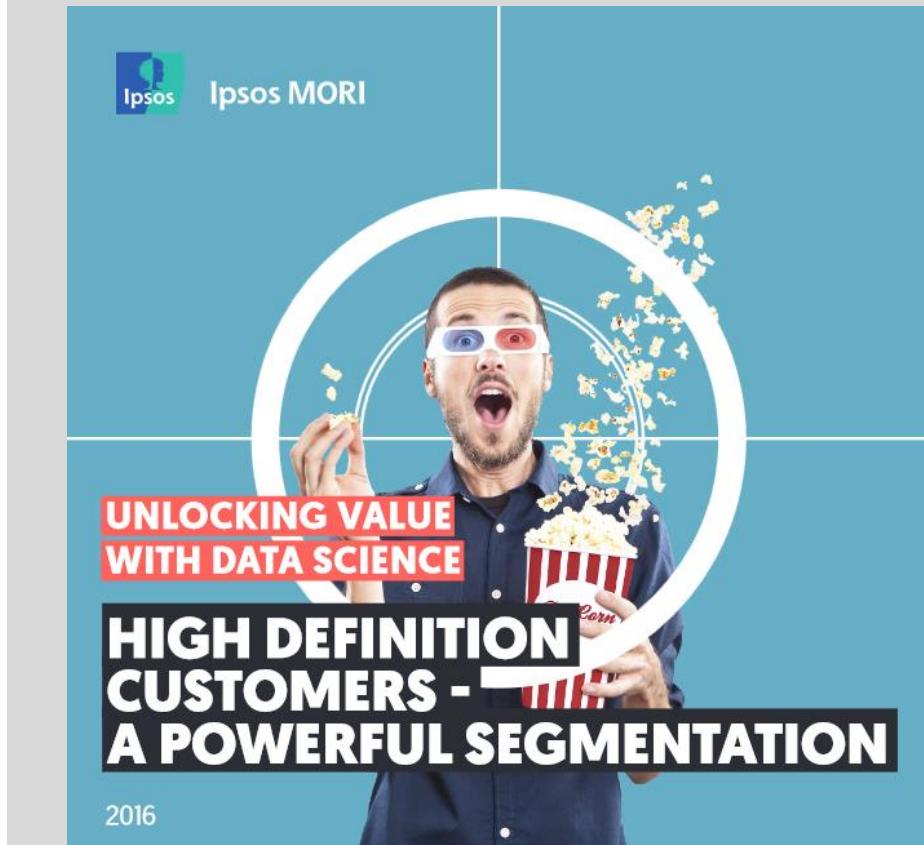


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MEDIA, BRANDS AND COMMUNICATIONS



HIGH DEFINITION CUSTOMERS - A POWERFUL SEGMENTATION



In this new thought piece, Leo Cremonezi explores how three types of advanced statistical analysis – Factor, Cluster and CHAID analysis – can help us unlock additional value from market segmentation

We use a number of advanced statistical analysis techniques to uncover the hidden stories, and value, in the data that may not be visible at first glance.

- Factor analysis – simplifying attributes to enable focused analysis
- Cluster analysis – grouping individuals by similarities to reveal segments
- Chaid analysis – modelling variables to predict outcomes

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HOUSING



HOW GREEN ARE BRITISH FRONT GARDENS?



An Ipsos MORI poll for Royal Horticultural Society to understand greenery in British front gardens.

Key findings from the survey include:

- 73% of British adults say planted areas along roads and streets would make them feel happier, 59% say they'd feel healthier and 58% say they'd feel calmer.
- 72% agreed that planted areas along roads and streets would make them feel proud of where they lived.
- 45% of those surveyed with grey driveways or front gardens think the space is too small for plants, with 28% of saying they need the space for cars.
- A further 23% of those with grey driveways or front gardens say they either don't have time, or it's too hard, to grow and maintain greenery in their front gardens.
- Only 10% of all those surveyed said growing plants in their front gardens was an activity they would like to get involved in.

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CONDUCTING SURVEYS OF TENANTS AND SERVICE USERS – A GUIDE



In 2013, Ipsos MORI produced 'Conducting surveys of tenants and service users – a guide' for the Scottish Housing Regulator (SHR) and after a short review have produced the updated guidance.

This guide was designed by Ipsos MORI to instruct landlords on good practice when conducting surveys of the tenants in their household stock. It has been used by all social housing landlords (local authorities and registered social landlords) in conducting surveys of tenants which are then submitted to the SHR as part of the compliance with the social housing charter.

In March 2016, the SHR commissioned Ipsos MORI to undertake a short review of this document to understand how well it functions in providing advice to landlords when conducting tenant surveys, and to identify any issues they face with the guidance or where additional clarity would be appreciated.

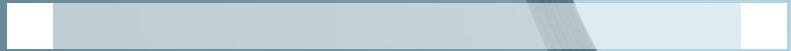
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IPSOS MORI OPINION



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Five questions business leaders should ask before they speak out on Brexit

Milorad Ajder of the Ipsos Reputation Centre looks at our recent research and asks: should you be taking a public stance?

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There is an app for that: How apps can add extra value to the world of music

Elliot Whitehead explores the different ways in which apps can help add value for consumers, brands and artist in the music industry.

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The Future of Money

Who will win the fight for customer wallets? The banking landscape is shifting as never before, says Hugh Good in the Financial Services Forum.

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Who'll win the European referendum? It all depends on the young.

If the young don't turn out, the result will be Brexit, writes Bobby Duffy in the *New Statesman*.

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Wondering why Boris Johnson keeps mentioning bendy bananas and Brexit – there's a simple explanation

People are getting their facts confused about Brexit, and this might be a nifty trick being played on us all, says Bobby Duffy in the *Independent*.

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