



Ipsos MORI

THE FUTURE **2016** OF RESEARCH SERIES

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IPSOS MORI HIGHLIGHTS

March 2016



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WELCOME TO IPSOS MORI'S MARCH HIGHLIGHTS

March sees British politics become about the 23rd June EU referendum and not much else. Concern about the EU has surged – to 20% of voters who say it is one of the biggest problems facing the country.

In 1975, at the last referendum on the issue, only 65% bothered voting. This time turnout is likely to be lower still, which may help the “Brexit” supporters. Even so, 62% of the public currently expect the country will vote to stay IN.

Elsewhere, despite George Osborne’s challenges balancing the books, most voters say they prefer him, rather than Labour, to manage the economy.

This month we also look at who should see your health data in a landmark study for the Wellcome Trust, and at global support for women’s rights to abortion.

For International Women's Day we reflect on why nearly half of women think men have it easier in life:

only 8% of women think they have more advantages in life than men.

As junior doctors continue industrial action against the government we find their support is holding up.

Finally we find pessimism about the future of younger people is at its highest recorded level – some 54% now expect “millennials” to have a worse life than their parents – up from only 12% in 2003.

We also look at how well branded content is working for major advertisers - and much more.

As ever let us know what you think!

All the best

Ben Page
Chief Executive, Ipsos MORI
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IPSOS MORI MARCH HIGHLIGHTS

EVENTS

- Invitation: The Future of the Insight Function

MEDIA, BRANDS & COMMUNICATIONS

- Emperor's new clothes or the future of Marketing?

SOCIETY

- The highest concern about the EU in 13 years
- Global citizens' views on abortion
- Gender equality – dream or reality?
- Most think equal representation of women in professions still a decade away
- The state of Syrian refugees in Jordan and Lebanon
- Generation Y least optimistic about their chances of leading a better life than parents
- Mexico Flair: A year of (more) scrutiny and change

BUSINESS

- Leadership connections 2016
- Healing the pain – customer loyalty
- Story-telling - getting to great research stories

POLITICS

- Satisfaction with Osborne dips, but is seen as more capable than his Labour rival
- Little change in public's views towards Europe – public still expects 'remain' to win
- The SNP and a second independence referendum
- The Death of Polling?

HEALTH

- Continued support for the junior doctors ahead of third round of strikes
- Commercial access to health data

IPSOS MORI OPINION



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INVITATION: THE FUTURE OF THE INSIGHT FUNCTION



In the first Future of Research event of 2016 we will explore how to drive impactful research.

Join us on 13 April to explore how insight can drive change within organisations, how to ensure the consumer or customer lies at the heart of what we do and how insight functions and agencies can deliver more bang for their buck.

Our panel of leading insight professionals from a variety of sectors will provide a health check for the insight function and offer a prognosis on its future.

Speakers:

Andrew Geoghegan,
Global Head of Consumer Planning, Diageo

Monique Hellel,
Senior Strategic Insight Manager, HSBC

Nick Rich,
Vice President - Consumer Insights, IHG

Paul Buckley,
Insights Director, Oral Health, GSK

James Randall,
Managing Director - Clients, Ipsos MORI



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MEDIA, BRANDS AND COMMUNICATIONS



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BRANDED CONTENT - EMPEROR'S NEW CLOTHES OR THE FUTURE OF MARKETING?



Content is the touchpoint du jour for more and more marketers – around 85 % of marketing professionals in the UK now use content marketing with around two thirds planning to increase spending this year.

But unlike advertising which is pushed at people, branded content has to be something people choose to spend time with.

Therefore the holy grail for marketers is ensuring branded content is interesting, engaging and ultimately leads to a positive impact on your brand.

The framework for successful branded content is resonance for people with the:

- Content
- Platform
- Brand

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SOCIETY



THE HIGHEST CONCERN ABOUT THE EUROPEAN UNION IN 13 YEARS



The Issues Index shows that, following the recent EU renegotiation and announcement of the referendum date, a fifth (20%) of the British public mention the EU as amongst the most important issues facing Britain.

- Of those, half (10% of the overall population) see the EU as the single most important issue facing Britain.
- This marks the highest level of concern since 2003 Treaty of Accession, allowing 10 new countries to join the EU.
- However, as is now the norm, immigration remains the most important issue facing Britain, mentioned by 44% of the public.
- In second place is the NHS, mentioned by 38% of the public.

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GLOBAL CITIZENS' VIEWS ON ABORTION



A new poll conducted by Ipsos in 23 countries around the world sheds light on global citizens' views on the controversial subject of abortion.

Key findings include:

- Three quarters (74%) of respondents in 23 countries around the world say abortion should be permitted.
- 45% say it should be permitted whenever a woman decides she wants one.
- Only 5% say that abortion should never be permitted, no matter what circumstances exist.

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EQUAL RIGHTS FOR MEN AND WOMEN – DREAM OR REALITY?



To mark International Women's Day, Ipsos asks respondents around the world their opinion on inequality between women and men in terms of their social, political and/or economic rights.

Key findings include:

- 88% in 23 countries around the world believe in equal opportunities for men and women.
- 73% agree that there is currently inequality between women and men.

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MOST THINK EQUAL REPRESENTATION OF WOMEN IN PROFESSIONS STILL A DECADE AWAY



A new poll for the Southbank Centre reveals most Britons think it will be a decade or longer before there are equal numbers of men and women in key professions.

Key findings are:

- People are generally more positive about the prospects for young women today compared to older generations, than they are about the prospects of young men today compared to their fathers.
- Some 60% of all Gen Y (men and women) think that young women will have a better life than women from their parents' generation, while only 44% are as positive about the prospects for young men.
- However, seven in ten people expect to wait longer than a decade to see equal numbers of male and female judges, chief executives, MPs and engineers – and around one in four expect to wait until at least 2036 for the gender gap to close.



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A LIFE SUSPENDED: THE STATE OF SYRIAN REFUGEES IN JORDAN AND LEBANON



A Life Suspended:

The State of Syrian Refugees in Jordan and Lebanon

February 2016

Ipsos MENA surveyed 2,200 Syrian Households in Lebanon and Jordan, gathering information on over 13,000 Syrian refugees, looking at their daily lives, challenges, attitudes, and future aspirations.

Key findings are:

- Syrian refugees have escaped from one life of struggles only to be faced by another.
- In their quest for normalcy, the majority have seemingly tried to pick up the pieces to restart their lives in the host countries, yet face challenges in assembling even the simplest of pillars that make up a basic standard of living, such as providing regular income for their families through employment, or an education for their children.
- As a result of these difficulties, most refugees see their current state as one of transition, and most have hopes of an immediate return to their homes once the conflict ends.

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GENERATION Y LEAST OPTIMISTIC ABOUT THEIR CHANCES OF LEADING A BETTER LIFE THAN PARENTS



Only a third of Generation Y think their generation will have a better quality of life than their parents, finds the study conducted for the Guardian.

Key findings are:

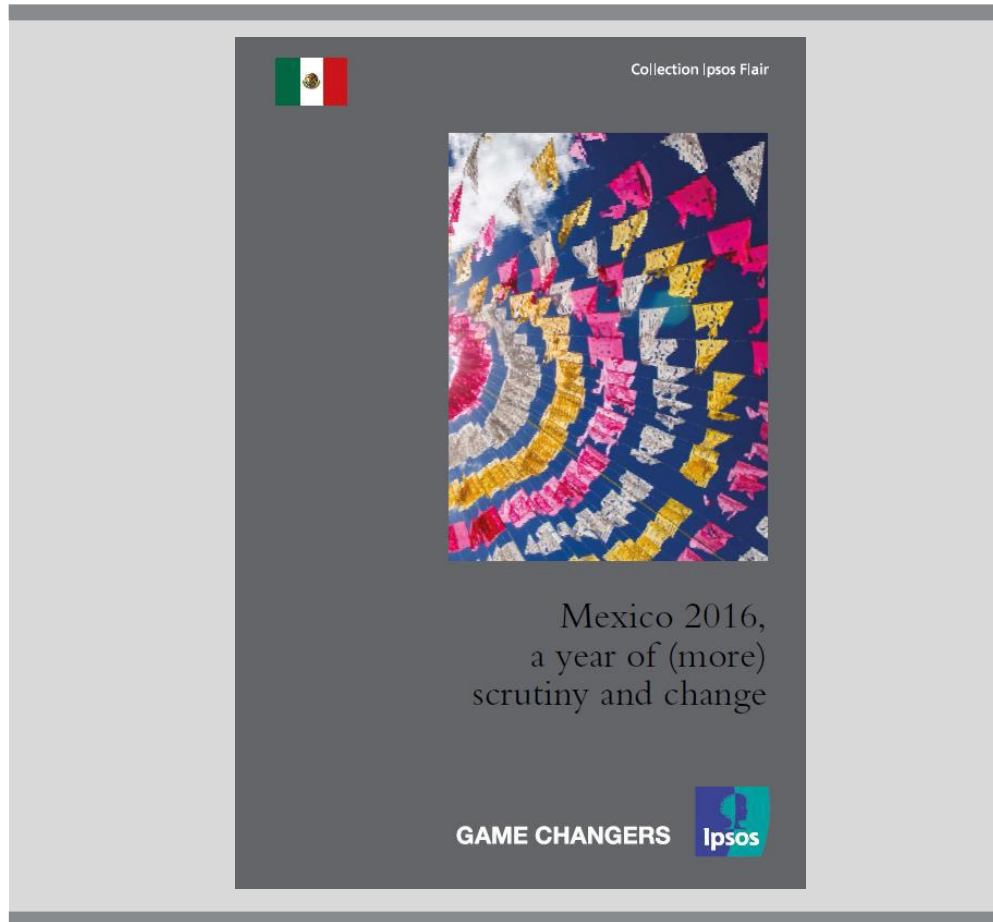
- Over half of the public think young people will have a lower quality of life than their parents, the highest level of pessimism for young people we've measured.
- Just one third (33%) of those from Generation Y (born between 1980 and 2000) agree that their generation will have had a better life than their parent's generation, compared to two thirds of those from the Baby Boomer generation (those born between 1946 and 1965).
- 54% of the public now think that quality of life for today's youth will be lower than that of their parents. This is the highest percentage of people saying quality of life will be lower for young people since we started asking this question.



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MEXICO FLAIR: A YEAR OF (MORE) SCRUTINY AND CHANGE



Ipsos Flair is a series of reports designed to present a vision of a country, through the observation and interpretation of behaviours, attitudes and opinions of its consumer citizens.

- *Mexico 2016: A year of (more) scrutiny and change* is the latest report in our *Ipsos Flair* series. Written by our Mexican experts, it looks at the current situation in this young and vibrant market.
- Mexico is in the middle of a long and difficult transformation process. It is a huge country with 120 million people and a long list of issues to solve, but the determination and willingness of its people is relentless. This report explores their current values and mood, as well as their ambition and desire for the future.
- Mexico follows recent *Ipsos Flair* reports for Colombia, Brazil and Thailand.



BUSINESS



LEADERSHIP CONNECTIONS 2016, HR AND THE C-SUITE DRIVING INNOVATION



How can HR help the C-suite drive innovation? Download new research from Ipsos MORI and Cirrus examining the HR contribution to the C-suite agenda.

This research explores the C-suite leaders' agenda for 2016 and the role of HR in helping to achieve their key priorities.

Our joint report offers a unique cross-analysis of opinions from C-suite leaders (as part of our Captains of Industry survey), from HR professionals, managers, as well as employees (as part of our RED programme).

How can HR professionals be recognised as true transformation agents by Board members?

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HEALING THE PAIN



Healing the Pain introduces the concept of 'Smarter Closed Loop Feedback', helping companies maximise the ROI of customer feedback programmes and reduce customer complaints and churn.

- The importance of customer experience as a driver of business performance is widely acknowledged, and many companies now deploy real-time Voice of the Customer (VOC) or Enterprise Feedback Management (EFM) programmes to enable them to generate 'hot alerts' when a customer experiences a poor level of service – we call these “Critical Incidents”. Closed Loop Feedback is when companies enable their staff to contact a customer following a critical incident and take appropriate action. However, the economics of Closed Loop Feedback have not yet been properly addressed.
- This new white paper, written by Ipsos Loyalty's Jean-Francois Damais and Roger Sant, explores the importance of responding well to bad experiences and how this can boost customer loyalty.

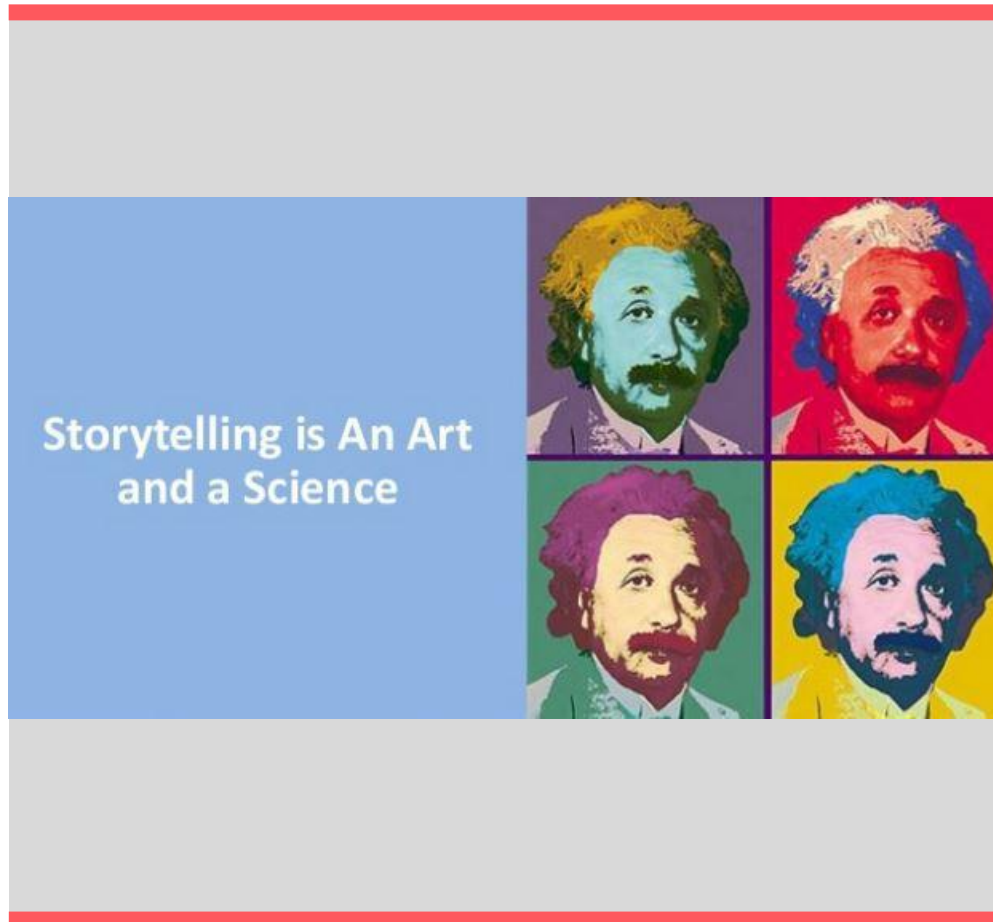


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GETTING TO GREAT RESEARCH STORIES



Everyone is talking about storytelling, but its role in the market research industry (and how to do it) is not always clear.

- In this presentation, Ipsos Marketing's Allyson Leavy and Douwe Rademaker discuss storytelling in the context of market research.
- It was presented at the Festival of New Market Research in February 2016.
- Highlights include:
 - How to get to the root of the business issue (the premise of the story).
 - How to use storytelling to transform data into insights.
 - How to sequence a story depending on the research conducted.
 - How to bring the story to life – so your stakeholders can remember it and re-tell it.



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POLITICS



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SATISFACTION WITH OSBORNE DIPS, BUT IS SEEN AS MORE CAPABLE THAN HIS LABOUR RIVAL



As we approach the Government's next budget announcement, Ipsos MORI reveals that for the first time since 2013 more of the public are dissatisfied than satisfied with the way George Osborne is doing his job as Chancellor of the Exchequer.

Key findings include

- Two in five (40%) are satisfied with Mr Osborne (down 4 points from July) compared to 46% who are dissatisfied (up 2 points) leaving the Chancellor with a net satisfaction score of -6 (down 6 points).
- Despite the dip in personal satisfaction ratings for George Osborne he holds a strong lead over his counterpart John McDonnell of the Labour Party. When asked who would make the most capable Chancellor 46% of the public back George Osborne compared to three in ten (29%) who back John McDonnell.

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LITTLE CHANGE IN PUBLIC'S VIEWS TOWARDS EUROPE – PUBLIC STILL EXPECTS 'REMAIN' TO WIN



As David Cameron ramps up his efforts to secure a new deal for Britain in the EU, the Political Monitor reveals little change from January amongst the public when it comes to how they will vote in the referendum on EU membership.

- When asked the referendum question “should the United Kingdom remain a member of the European Union or leave the European Union?” the poll finds a majority (54%) would vote to remain a member (down 1 point from January) and 36% would vote to leave (no change).
- The trend question on EU membership also reveals little difference from last month.
- When asked “if there were a referendum now on whether Britain should stay in or get out of the European Union, how would you vote?” half (51%) would vote to stay in (up 1 point) while 36% would vote to get out (down 2 points).



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THE SNP AND A SECOND INDEPENDENCE REFERENDUM



As May's Scottish Parliament election looms large, a poll for STV News suggests that the SNP remains on course for victory while Brexit could swing Scots behind a second independence referendum 'Yes' vote

- Among those likely to vote, 53% would cast their constituency vote for the SNP (up three points from November 2015), while 20% would vote for Scottish Labour (no change).
- The poll shows that Scots are strongly in favour of remaining in the EU (62% would vote to remain versus 26% who would vote to leave and 12% who are not sure) with the gap in opinion still wider than it is across Britain as a whole.
- A vote for Britain to leave the EU against the wishes of the majority of Scots is seen as a possible trigger for a second independence referendum. The poll suggests that if this were to happen then opinion would be more in favour of Scotland becoming independent than it is now.
- Over half (54%) said they would vote 'Yes' in a second independence referendum if Britain voted to leave the EU when voters in Scotland voted to remain, compared to 39% who would vote 'No' and 7% who were unsure.



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DEATH OF POLLING?



Bringing together leading Ipsos experts, this presentation looks at the state of opinion polling in the world today.

Following the 2015 UK General Election, where pollsters got it wrong, there is a question about whether this is representative of a global issue and whether the experiences of other countries can provide new insights.

Across the world, pollsters are having to face up to tough questions, including:

- How to achieve a representative sample
- How to predict turnout accurately
- How to ensure polls are reported well and understood among the media, politicians and the public

Our recent event saw a panel of Ipsos colleagues, from the UK, the US, Canada, Italy and Sweden, discuss their country's current political landscape, the role and challenges of polling and what we need to do to get it right.

Full details are in the presentation, which also explores the on-going race to the White House.



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HOUSING



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HELP TO BUY – ITS IMPACT ON HOME BUYERS



Evaluation of the Help to Buy Equity Loan Scheme has found that consumer demand has been more effective, feeding through to an increase in housing supply.

Key findings include:

- Investment in the scheme up to January 2015 is estimated to have generated 43% additional new homes, an equivalent of contributing 14% to total new build output between April 2013 and June 2015.
- Developers report seeing improved confidence in the market and think the loan made a strong contribution to the profile and awareness of the new build market.
- Lenders were also positive – believing that the scheme has helped to make it more financially viable to enter market.
- 70% of consumers assisted by the scheme say they were very satisfied with the overall experience of purchasing property using a Help to Buy Equity Loan, and 82% say they would not have been able to buy the same property without assistance.



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HEALTH



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CONTINUED SUPPORT FOR THE JUNIOR DOCTORS AHEAD OF THIRD ROUND OF STRIKES



The poll for BBC News finds two in three support the doctors' cause. The majority still think the government is most at fault for the ongoing dispute – but a rising number think government and doctors both to blame equally

- Public support for the third round of the junior doctors' strike is as high as it was for the first two strikes in January and February.
- The same proportion (65%) support junior doctors' strikes as for the previous round of action in February (66%) – as long as emergency care is provided.
- Opposition to junior doctors striking has decreased by five percentage points to 17% compared to last month.

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PUBLIC HEALTH ENGLAND 2015/16 STAKEHOLDER RESEARCH



The third wave of Public Health England's (PHE) research has been conducted with local authority chief executives, directors of public health and officers.

Stakeholder views on:

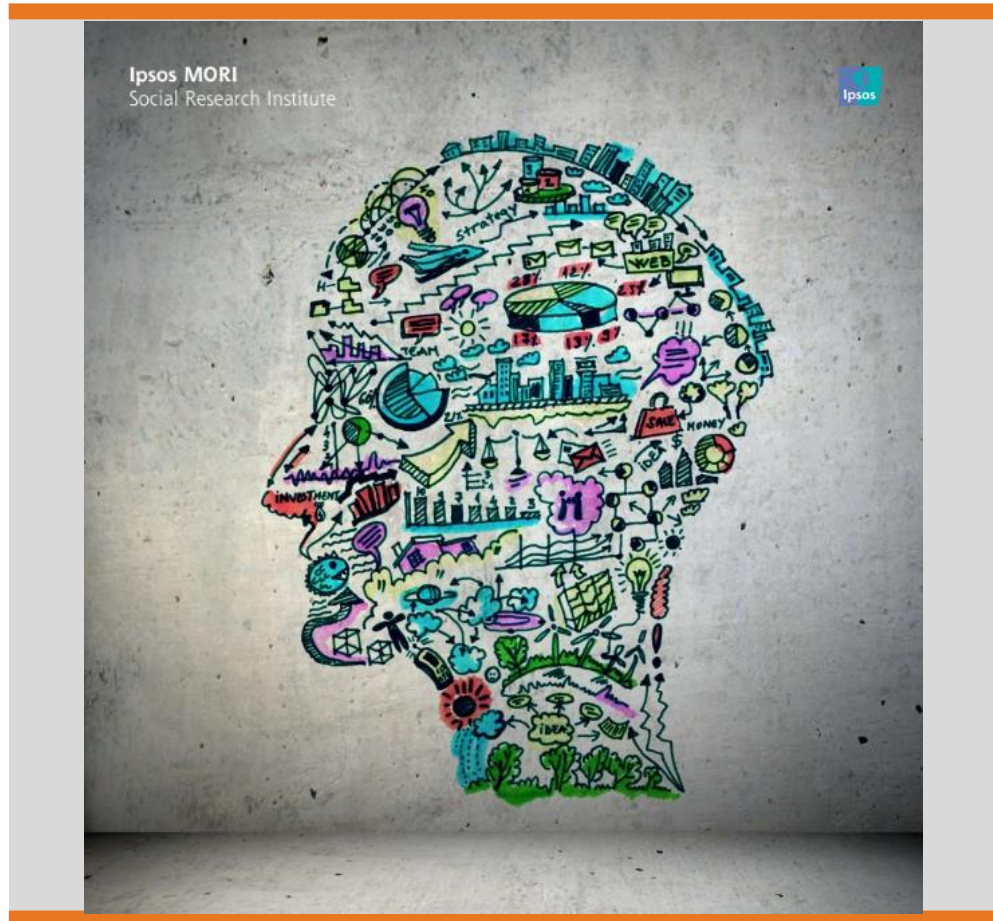
- Working relationships
- Expectations of PHE
- PHE's priorities and focus
- Areas for improvement

Key findings include:

- Working relationships remain positive with 76% describing it as good.
- 85% say PHE work in partnership with stakeholders.
- Local relationships are developing but there is a disconnect with PHE nationally.



COMMERCIAL ACCESS TO HEALTH DATA



The research for the Wellcome Trust discusses what the public think about patient records being used by commercial organisations.

Key findings include

- The report has revealed that the majority are in favour as long as there is a clear public benefit and appropriate safeguards are in place.
- While there is a core group of people who do not want this health data shared *at all*, many people find that sharing health data with commercial organisations is acceptable if there is a clear public benefit for this sharing.
- A clear public benefit is often seen to be, for example, something with a clearly medical aim, such as developing treatments and, in some cases, improving health services.



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Continental shift: What Europe thinks (and feels)

Simon Atkinson blogs for the Huffington Post on what our recent research reveals about Europeans' hopes and fears and their attitudes to life in Europe.

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Wisdom of the crowd: Polls show Brits can predict the future (sometimes)

In December 2014, we asked Britons to predict what would happen in 2015. How well did they do? asks Hannah Shrimpton in Politics.co.uk.

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The riddle of productivity: How can business leaders improve it when they can't agree on what it means?

Andrew Croll, Research Director at Ipsos Loyalty writes about how business leaders define productivity and what this means for the UK's productivity problem.

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IPSOS MORI OPINION

Over half of customers think they are working harder than companies to fix problems

Jean-François Damais reveals an Ipsos study which found that all too often, customers believe they are putting in more effort than companies to get things resolved following a negative complaint or incident.

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CONTACT

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

