



IPSOS MORI HIGHLIGHTS

May 2016



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WELCOME TO IPSOS MORI'S MAY HIGHLIGHTS

Stay or go? Politics in May has again hinged on Brexit. With the public divided, but expecting Remain to win (as do the betting markets) and most businesses hoping it will, we have a clear lead for Remain in our polling, even after allowing for the tendency of telephone polls to over-represent voters and more engaged graduates. As in the election of 2015, economic concerns seem to be trumping other anxieties. Most people expect the economy to suffer in the short-term if the UK leaves the EU, suggesting warnings from the Bank of England, Treasury and others are having an effect.

Immigration is the other big issue that we explore this month – it is one that undecided voters are very concerned about – although empirically many undecided voters fail to turn up at polling stations. Turnout in the referendum still looks to be well below the General Election turnout – a challenge for the Remain camp, as their voters are less motivated.

David Cameron's personal ratings have slipped as he has fought this campaign, although he remains more popular in his divided party than does Jeremy Corbyn among Labour voters; most people still don't think Labour is ready to form a government.

Elsewhere this month, for DCMS we look at cyber security; most business are not ready for a data breach and have no formal policies in this area.

We find that one in five drinkers want to cut down, but don't get any help doing so.

We look at what advertisers can do about ad-blocking, the rise of connected health, organ donation (your wishes and not your relatives' are most important) and much, much more.

All the best

Ben Page
Chief Executive, Ipsos MORI
ben.page@ipsos.com



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IPSOS MORI MAY HIGHLIGHTS

EVENTS

- Invitation: - The State of Britain and Brexit

POLITICS

- Cameron still viewed as most capable leader
- Remain and leave supporters split on Obama's intervention
- Half of people in nine European countries believe UK will vote to leave the EU
- Immigration one of the biggest issues for wavering EU referendum voters
- Understanding Society May 2016: The death of polling?
- International companies say Brexit would be negative

ECONOMY & BUSINESS

- Half believe the economy will get worse in the short term if Britain leaves the EU
- Half say government doing bad job on economy
- Are your customers working too hard?
- Cyber security breaches survey 2016

SOCIETY

- Ipsos Views: Perils of Perceptions
- Building the Northern Powerhouse
- Shifting ground: Views on immigration

HEALTH

- Wishes of organ donors should take priority over wishes of their families, public says
- PneuVUE: A new view into pneumonia among older adults
- Drinkaware Monitor 2015: UK adults' experiences of and views on cutting down
- Connected health: Coming ready or not!

MEDIA, BRANDS & COMMUNICATIONS

- The rise of ad blocking
- The path from ad blocking purgatory to programmatic nirvana
- The many faces of modern motherhood
- Right media, right moment – Understanding people in the media world

IPSOS MORI OPINION



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INVITATION - THE STATE OF BRITAIN AND BREXIT



As we approach referendum day, we will debate the issues with an expert panel, drawing on the huge range of studies we've been conducting across the UK and internationally.

Join us on the evening of 8 June at our annual summer debate, focused (inevitably) on the biggest choice facing us for a generation – the EU referendum – and what it tells us about Britain.

Speakers:

Isabel Hardman - Assistant Editor, The Spectator

Tim Montgomerie - Columnist, The Times

Vicky Pryce - Chief Economic Adviser, Centre for Economic and Business Research

Ben Page - Chief Executive, Ipsos MORI

Bobby Duffy - Managing Director, Ipsos MORI Social Research Institute

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POLITICS





CAMERON STILL VIEWED AS MOST CAPABLE LEADER



David Cameron is revealed as the most capable party leader in the eyes of the British public in the latest Ipsos MORI Political Monitor. Although Jeremy Corbyn is seen as being more honest than most politicians.

- When asked about various attributes of each of the leaders more than half (53%) say the Prime Minister is a capable leader compared with 27% who say the same for Labour leader Jeremy Corbyn
- 16% see Liberal Democrat leader Tim Farron as capable and one in four (24%) say UKIP's Nigel Farage is capable
- David Cameron also leads the field as being the most patriotic of the leaders with two in three (65%) associating this quality with him, just ahead of Nigel Farage (61%)
- Two in five (42%) say Jeremy Corbyn is patriotic while one in four (26%) say the same for Tim Farron



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REMAIN AND LEAVE SUPPORTERS SPLIT ON PRESIDENT OBAMA'S EU INTERVENTION



New polling shows the British public are split on US President Barack Obama expressing his view on whether or not Britain should stay in the European Union.

- Half (49%) think that President Obama should express his view while 46% say that he should not
- Opinion strongly differs however when looking at who will vote to remain in the European Union and those who will vote to leave (respondents were told that President Obama was expected to say that it is a matter for the British people to decide, but that the US supports a strong UK in the EU)
- Two in three (68%) remain voters say Mr Obama should express his view (28% say he should not) versus one in four (25%) leave supporters (72% say he should not).
- Nevertheless the majority of the British public say that President Obama's view will not be important to them in deciding how they will vote.



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HALF OF PEOPLE IN NINE EUROPEAN COUNTRIES BELIEVE UK WILL VOTE TO LEAVE THE EU



With the British referendum on EU membership rapidly approaching, a new poll reveals that half (49%) of Europeans in eight other EU countries believe that Britain will vote to leave the EU.

Key findings are:

- Half think Brexit could lead to a 'domino effect'
- Europeans more likely to think Brexit will harm the EU than the UK
- Four in ten Europeans foresee a reduced EU by 2020

Between them, the nine EU countries surveyed represent around three-quarters of the EU population and approximately 80% of its GDP.

This figure varies between a majority in Italy and France (60% and 58% respectively) thinking that Britain will vote to leave, to 42% in Germany.



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IMMIGRATION ONE OF THE BIGGEST ISSUES FOR WAVERING EU REFERENDUM VOTERS



Immigration is one of the key issues which will affect how people vote in the upcoming EU referendum, along with the effect on the economy and Britain's sovereignty, a new Ipsos MORI study published today finds.

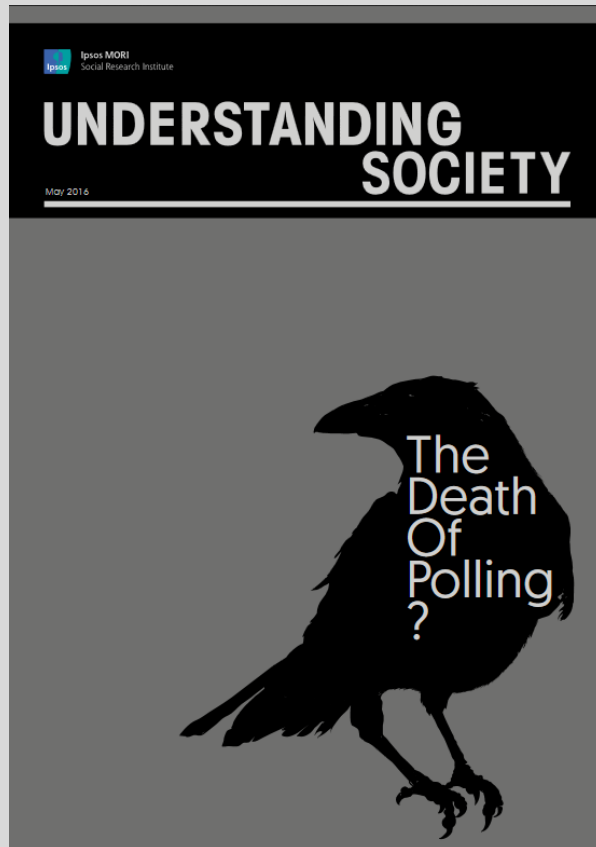
- Over half believe the Government should have total control over immigration even if it means coming out of EU
- More than half overall (55%) and one in five remain voters (20%) say that they think the government should have control over who comes into Britain even if this means having to leave the EU
- Immigration will be a big factor in how people decide to vote in the EU referendum, particularly for leavers and for undecided voters
- Almost half (48%) say that the number of EU immigrants coming into the UK will be important to them when they vote in the EU referendum



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UNDERSTANDING SOCIETY MAY 2016: THE DEATH OF POLLING?



This issue of **Understanding Society** focuses on two closely connected topics that are core to what we do at Ipsos MORI: the government's push to open up and improve the policy making process, and the very real challenges around the legitimacy of our democratic system.

In this edition, we examine the state of polling across the world, giving an international perspective from some of the 30 countries and five continents in which Ipsos carries out political research.

We are also delighted to have an interview with **Professor Samuel Wang**, founder of the Princeton Election Consortium website.

Our expert contributors include **Ann Treneman**, journalist and author of 'All in this together: My five years as a political stalker', who takes us on the campaign trail, and **Dr Rob Ford**, one of the most prominent thinkers in this election, who dissects the rise of the insurgent parties.

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INTERNATIONAL COMPANIES SAY BREXIT WOULD BE NEGATIVE FOR THEIR BUSINESSES



An overwhelming majority of international businesses (78%) from seven countries believe that Brexit would be negative for them, according to a survey by Ipsos MORI.

- A handful (5%) think a vote for Brexit in the 23rd June referendum would be positive for their business, with the remainder saying either that the effect would be neither positive nor negative (13%) or that they do not know (4%).
- Among those saying the impact would be negative, more think the impact would be “very” rather than “fairly” negative (44% very, 34% fairly).
- Participants were asked a follow-up question about the impact of Brexit on likely future investment in the UK. A clear majority say that this impact would most likely be negative (61%); a few (5%) take the opposite view.

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ECONOMY AND BUSINESS



HALF BELIEVE THE ECONOMY WILL GET WORSE IN THE SHORT-TERM IF BRITAIN LEAVES THE EU



With just one month to go until the referendum the new Political Monitor shows that on balance Britons believe the economy would be better off in the long term if Britain left the EU yet likely be worse off in the years immediately following Brexit.

- When asked if Britain votes to leave the European Union, to what extent do you think it would be better or worse for Britain's economy over the next five years, half (49%) say it would be worse compared with a quarter (26%) who say it would be better (15% say Brexit would make no difference).
- When asked about Britain's economy over the next ten to twenty years however two in five (39%) think it would be better outside the EU compared with 35% who say it would be worse (11% say Brexit would make no difference).

HALF SAY GOVERNMENT DOING BAD JOB ON ECONOMY AS ECONOMIC OPTIMISM FALLS



One year on from the election of a Conservative majority in Westminster, the Political Monitor finds a fall in the public's ratings on the government's management of the economy.

- Just under half (47%) say the government has done a bad job over the past year compared with 42% who say they have done a good job. In March 2015, 56% said the Coalition government was doing a good job, and 37% were critical.
- Women, young people, the working classes and those in the public sector are more negative, while men, older people, the middle classes and private sector workers are more positive.
- Despite the falling ratings for the government's management of the economy, the public still do not believe the Labour party or its leader Jeremy Corbyn are ready for government.
- Sixty-three percent disagree that Labour is ready to form the next government, compared with 27% who agree.



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ARE YOUR CUSTOMERS WORKING TOO HARD?



A new report from Ipsos Loyalty investigates the role Customer Effort plays on customers' satisfaction with complaints handling and on broader outcomes such as advocacy and loyalty.

Overall the premise is that the less effort customers have to put in during an interaction, the more likely they are to recommend and continue doing business with the company.

This is particularly relevant in complaints management. It makes intuitive sense that when customers face negative 'critical incidents', or 'moments of truth' in the customer experience, the more effort they have to put in to resolve the issues and the more dissatisfied they will be.

This is expected to have a significant impact on customer advocacy and loyalty.

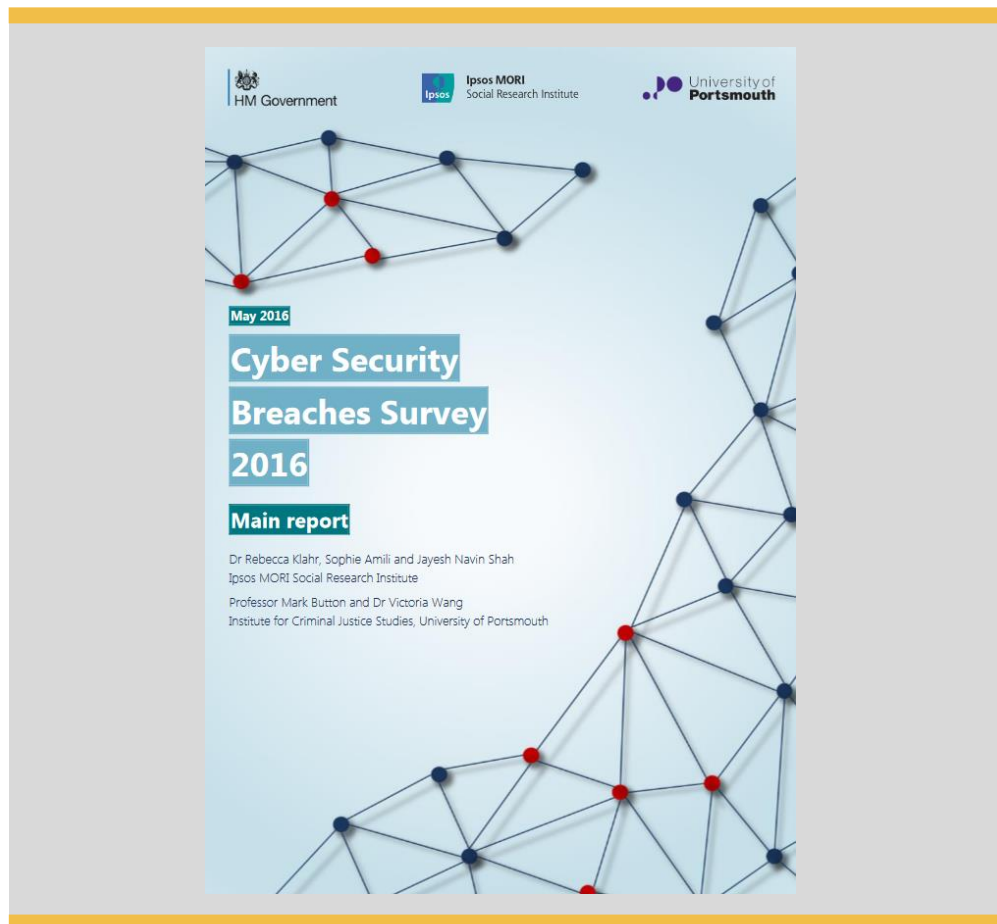
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CYBER SECURITY BREACHES SURVEY 2016



Ipsos MORI was commissioned by the Department for Culture, Media and Sport to carry out quantitative and qualitative research with UK businesses on cyber security.

E-commerce has become much more important to UK businesses in recent years. In this context, seven in ten businesses (69%) say cyber security is either a very high (33%) or fairly high (37%) priority for their organisation's senior management. However, many may not fully understand how their organisation is at risk and what action to take:

- Just half (51%) of all businesses have attempted to identify the cyber security risks faced by their organisation, for example through health checks, risk assessments or audits
- Half of all firms (48%) have enacted basic technical controls across all five areas laid out under the Government-backed Cyber Essentials scheme
- Three in ten (29%) have written cyber security policies, and just one in ten (10%) have formal incident management processes



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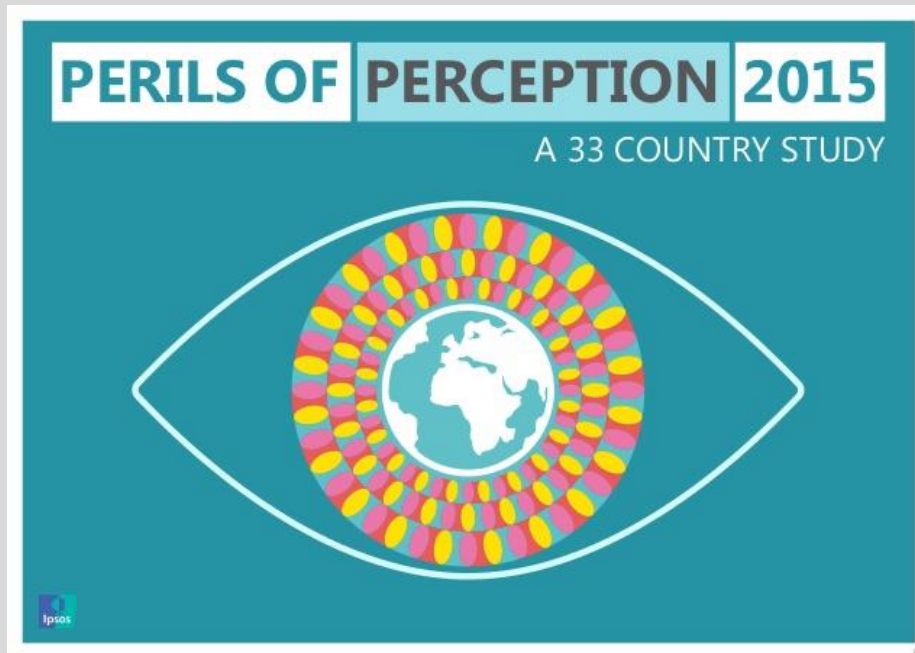


SOCIETY





IPSOS VIEWS: THE PERILS OF PERCEPTION



The 33-country international research study explored how clueless people are in estimating a range of key social realities.

Following on from the 33-country Perils of Perception survey, Bobby Duffy has written a new Ipsos Views white paper on the subject.

He sets out a series of themes we need to consider, including:

- **What do we get wrong?** Americans think 33% of their population are immigrants, when in fact it's just 14%
- **Why are we often so wrong?** Bobby takes us through "The Ignorance Equation"
- **Does it matter that we're wrong?** Our view is that this does matter – misconceptions have always been with us, but it doesn't mean we cannot learn from understanding these perception gaps



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BUILDING THE NORTHERN POWERHOUSE

Building the Northern Powerhouse: Next steps for transformation

The Outcomes Report
from the UK Northern
Powerhouse International
Conference & Exhibition 2016



Ipsos MORI reports on 'Building the Northern Powerhouse' – Next steps for transformation.

The inaugural UK Northern Powerhouse International Conference and Exhibition was attended by around 2,500 delegates keen to debate how the Northern Powerhouse aims and ambitions could be achieved.

At the heart of the debate is the principle of devolution – the decentralisation of power from central to regional and local government.

Earlier this week the research findings were published in an outcomes report entitled Building the Northern Powerhouse: Next steps for transformation. The report combined our research with insightful summaries of the panel discussions and made a number of recommendations in order to maintain the momentum on making the Northern Powerhouse vision a reality.

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SHIFTING GROUND: VIEWS ON IMMIGRATION DURING THE LONG TERM AND DURING ELECTION CAMPAIGNS



A major new research study by Ipsos MORI looks at how British attitudes towards immigration have changed over the long term and during election campaigns.

The study finds concerns about immigration have indisputably risen over the long term. The importance of immigration as an issue facing Britain on the Economist/Ipsos MORI Issues Index reached record levels in 2015, with 56% of the public mentioning it in September; the highest level ever recorded since the series started in the 1970s.

As well as growing concern overall, there were changes in the profile of people who are concerned about the issue. In particular, in the early 2000s there was relatively little difference between the oldest and youngest generations on concern about immigration, but in the last few years there is a growing generational divide with older generations having become much more concerned than younger generations.



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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 who wants to become an organ donor after their death should be followed, even if their family disagrees, according to a new opinion poll.

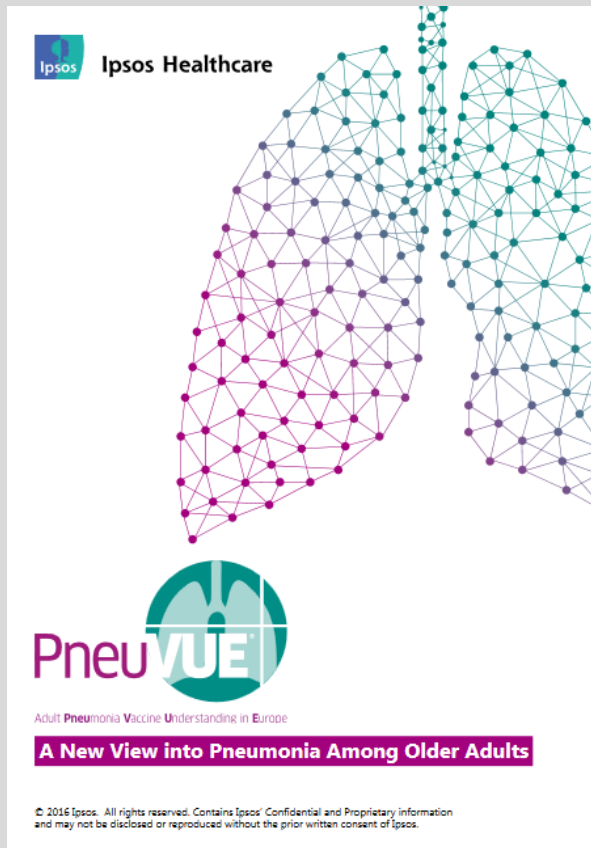
- At present, NHS doctors will not use organs if the potential donor's next of kin objects, even though the law allows the doctors to do so
- Asked if the family "should or should not be able to block the use of organs from an adult who had agreed to be a donor before they died", 88% said the family 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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PNEUVUE: A NEW VIEW INTO PNEUMONIA AMONG OLDER ADULTS



PneuVUE® (Adult Pneumonia Vaccine Understanding in Europe) survey shows there is a generally poor understanding about the risks and prevention of pneumonia across Europe.

Pneumonia is responsible for over 120,000 deaths in Europe per year*, with older people and those with certain medical conditions particularly vulnerable. It places a significant burden on those affected and their families, costing approximately €10 billion per year to society**.

- 8 out of 10 adults at risk report they are not vaccinated against pneumonia
- Nearly 8 out of 10 older adults (78%) do not feel personally concerned about the risk of catching it
- Only 3 out of 10 older adults are aware that pneumonia vaccines exist

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DRINKAWARE MONITOR 2015: UK ADULTS' EXPERIENCES OF AND VIEWS ON CUTTING DOWN



Drinkaware commissioned Ipsos MORI to carry out a survey of UK adults, looking at their drinking behaviours and attitudes towards alcohol, and their experiences of cutting down.

The main aims of the research were:

- To provide an overview of adults' drinking behaviour in the UK
- To take a close look at attitudes towards alcohol and harmful drinking behaviour
- To explore experiences of moderation within the UK population

Key findings:

- One in five of UK drinkers are currently cutting down (9%), or thinking about it (11%)
- Yet the majority of these people appear to be doing so without getting any support or guidance.



CONNECTED HEALTH: COMING READY OR NOT!



Ipsos International Survey on **Connected Health**

A Syndicated Research Report

The first Ipsos survey on the uptake and use of Connected Health across the USA, UK and Japan from multiple stakeholder perspectives.

Connected Health – sometimes referred to as Digital Health – is a potential game-changer for global healthcare.

- Not only does it enable patients and consumers to be more actively engaged in their own health, it allows physicians to provide recommendations based on more than an occasional consultation. Already we can see a shift in the patient-provider relationship
- The first Ipsos International Survey offers a picture of the uptake and use of connected health technologies

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MEDIA, BRANDS AND COMMUNICATIONS



THE RISE OF AD BLOCKING



Ad blockers have become an increasing worry 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. But what is it about online advertising in the first place that makes people want to take active steps to avoid it?

Online advertising has gained a negative reputation over the last couple of years, an opinion that both people that do and don't use ad blockers shared.

Their main reasons being:

- Online ads are perceived as annoying
- Online ads are often irrelevant to the viewer
- Online ads can be intrusive
- Online ads can be creepy

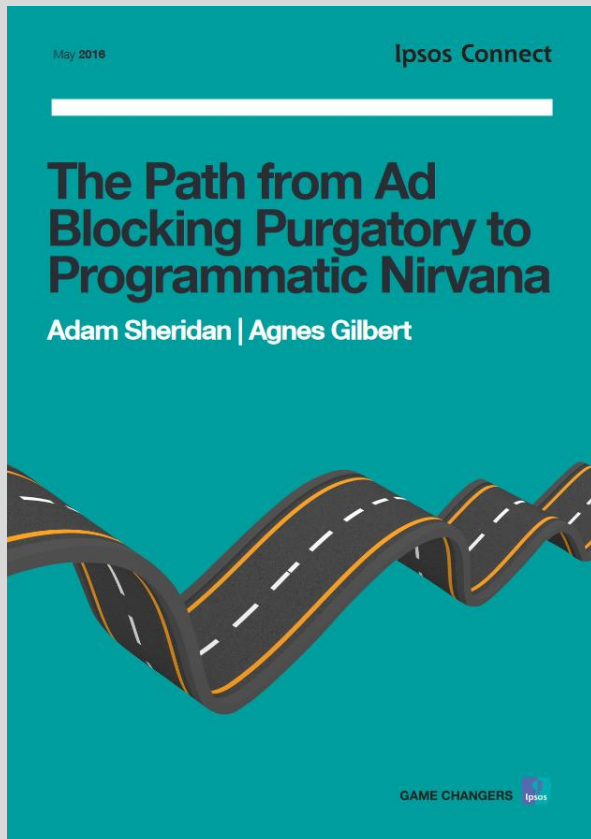
However, people are prepared to turn ad blockers off under the right circumstances. Find out how to avoid these pitfalls and ensure your advertising engages with your intended audience.

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THE PATH FROM AD BLOCKING PURGATORY TO PROGRAMMATIC NIRVANA



In this new paper from Ipsos Connect, Adam Sheridan and Agnes Gilbert address some of the key issues around escaping ad blocking purgatory and returning to the programmatic nirvana originally promised.

Some considerations for advertisers about how to reduce the need for ad blockers include:

- **Redefining variables of programmatic currencies** – buying and selling behaviour is currently defined by what the market place values
- **Greater availability of user opt-in ad formats** – skippable and auto play ad formats, such as YouTube and Facebook Video, offer the best of both worlds
- **Optimising advertising to the online experience** – advertisers need to consider ways to creatively add to the online experience, rather than intrude on it

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THE MANY FACES OF MODERN MOTHERHOOD



Marketers and advertisers crave simplicity. But by simplifying the lives of consumers are they failing to understand the complex ecosystem of identities related to motherhood?

We found there was a huge raft of identities which mums said defined their outlook and behaviour.

We believe marketers and advertisers should consider these 5 key points to ensure authenticity:

1. More diverse teams in advertising agencies will better reflect the needs states of real mothers
2. Don't advertise to a 'universal' mum
3. Remember, they are the most educated mothers in history
4. Don't be afraid to challenge out of touch messaging
5. Get as close as you can to your broader target of mums



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RIGHT MEDIA, RIGHT MOMENT – UNDERSTANDING PEOPLE IN THE MEDIA WORLD



Ipsos Connect

RIGHT MEDIA, RIGHT MOMENT

UNDERSTANDING PEOPLE
IN THE MEDIA WORLD

Thought Piece
2016

Media owners face the dual challenge of building a brand that people choose to spend time with, and demonstrating to advertisers that their platform can deliver the right audiences and impact. In order to do that they need to be able to prove the unique value they bring, whether comparing or by showcasing what they do really well.

There are a number of influences affecting media and content brands that impact on consumer decisions and are changing the media landscape. .

We believe these are the three key questions that media owners and advertisers should be asking when thinking about understanding the effectiveness of a particular platform or channel.

1. Am I reaching the right people, at the right time, in the right way?
2. Why is it the right moment to reach these people?
3. Can I prove the unique value that one platform/channel offers to both people and advertisers?

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INTERNATIONAL



AMERICANS MORE LIKELY THAN BRITONS TO SAY THERE IS A 'SPECIAL RELATIONSHIP'



A new poll from Ipsos MORI reveals that although Americans are slightly more likely than Britons to believe the 'special relationship' currently exists, a majority of both populations feel 'Brexit' would make little difference to the connection between the two countries.

- Half (52%) of Americans agree that there is currently a 'special relationship' between the two countries, as do 43% of Britons
- Britons though are more sceptical about the relationship – one in five (20%) disagree that it currently exists, compared with just 7% of Americans
- When asked to think about the possible implications of Britain voting to leave the EU, 58% of Britons and 60% of Americans think it would make no difference to the special relationship. Britons though are more worried about the potential impact than Americans



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Scottish stability in election run-up?

Ipsos MORI Scotland director Mark Diffley suggests in Holyrood magazine, that Scotland may now be entering a period of political and electoral stability.

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Who will win the race to treat NASH?

Dr. Sabina Heinz and Victoria Allan write for Pharma Exec on our research into NASH (Non Alcoholic Steato Hepatitis) and ask where the biggest buzz around the pipeline products is.

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Interesting times ahead for all parties in the Scottish Parliament

Ipsos MORI Scotland director Mark Diffley takes a look at the Scottish Parliament election results in Holyrood magazine.

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IPSOS MORI OPINION

The signs that David Cameron could win another election – if he wanted to

While polls indicate voters are concerned about the government's economic management, they don't think Labour would do any better, writes Ben Page in the Spectator.

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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:

James Randall

Managing Director, Key Clients

james.randall@ipsos.com

www.ipsos-mori.com

All methodological details are available via the website links

