



IPSOS MORI HIGHLIGHTS

November 2015

THE **2015**
FUTURE
OF RESEARCH
SERIES

Ipsos MORI



WELCOME TO IPSOS MORI'S NOVEMBER HIGHLIGHTS

A sobering month. In the wake of the Paris attacks, British public opinion has swung round to supporting military action in Syria (54%) even though 79% say they think it will make life more dangerous here.

This month sees economic confidence and confidence in George Osborne slip a little, as his difficulties making further cuts to public spending hit the headlines. He will draw some comfort from the fact that the public have become less worried about future cuts to public services since 2012, as we cover here, although concern about the future of the NHS is at record levels, even if patient satisfaction is holding up.

Labour is not in good shape: only 22% believe Jeremy Corbyn and John McDonnell would be better than the Prime Minister and Chancellor at running the economy.

Our latest analysis suggests that once boundary

changes to constituencies have happened, Labour will need the sort of swing it has only ever achieved twice before – in 1945 and 1997 – if it is to win in 2020.

Meanwhile we have the highest ever anxiety about immigration, but also housing and poverty, that we have ever measured since 1974. In London, housing now swamps all other public concerns.

We also look at digital payments, open APIs and the latest from our Reputation Council.

We have included data from Russia and Colombia – let me know if you'd like to see more regular reports from across the 87 countries we cover.

Ben Page

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IPSOS MORI NOVEMBER HIGHLIGHTS

OUR EVENTS

- End of Year Review 2015
- Uniting media and creativity in a connected world
- Understanding digital payments through the eyes of the consumer

MEDIA, BRANDS & COMMUNICATIONS

- Beating Generation Next's Attention Deficit
- Wisdom of the Crowd '#SocialEthics' report

ECONOMY & FINANCE

- Open API - Exploring the views of consumers and small businesses

BUSINESS

- The Reputation Council Report

SOCIETY

- Economist/Ipsos MORI Issues Index
- Coming to terms with austerity?
- Spotlight on Russia
- Columbia Flair: Beyond the clichés
- Paris attacks have not changed Britons' view on refugees much
- Views from Scotland

POLITICS

- Leader change before GE20?
- Public knows little about the 'devolution revolution'
- Public confidence in George Osborne slips
- Long-term policies for public services

HOUSING

- Londoners say housing is now the number one issue facing the capital

IPSOS MORI OPINION



END OF YEAR REVIEW 2015



Join us for a glass of bubbly at the Ipsos MORI End of Year Review. We will look back at the events of 2015 and explore the political, demographic and technological challenges that lie ahead.

We will also outline findings from our global survey Perils of Perception where we look at how wrong people are about the society they live in, from predicting the levels of immigration and obesity to guessing how many people have access to the internet.

Speakers:

Lord (Victor) Adebowale CBE, Chief Executive, Turning Point

Emily Maitlis, Presenter, BBC Newsnight

Trevor Phillips OBE, President, John Lewis Partnership Council

Ben Page, Chief Executive, Ipsos MORI

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UNITING MEDIA AND CREATIVITY IN A CONNECTED WORLD



UNITING MEDIA AND CREATIVITY

IN A CONNECTED WORLD

Ipsos Connect Breakfast Seminar
October 2015



Ipsos Connect

If you were unable to join us at our recent **Uniting Media and Creativity in a Connected World** event, we can still share the content where we explore the challenges brands face in today's media and advertising landscape.

We examine how you can harness the full power of your brand's big idea by uniting media and creativity. Delivering the right content, in the right context and the best ways to measure and evaluate your success.

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

[Read more >>>](#)

UNDERSTANDING DIGITAL PAYMENTS THROUGH THE EYES OF THE CONSUMER



Contactless payments are now part of the everyday landscape. Consumers are using mobile devices and digital wallets (even if they don't know what they are) and new payment innovations are launching constantly. We ask who's paying in the contactless, mobile and digital world?

At our recent Loyalty Consumer Payments event we were delighted to share new research which sheds light on the attitudes and behaviours of the UK consumer; about what they think and feel about these new options.

Click below to see slides from the event.

[Read more >>>](#)

MEDIA, BRANDS AND COMMUNICATIONS



BEATING GENERATION NEXT'S ATTENTION DEFICIT



Brands are competing for attention against a wide variety of sources from Taylor Swift videos and Vine stars, to personal social media streams where the drama, excitement and relatability of Generation Next's social circles are played out. How do brands even try to compete for their attention?

This paper will investigate:

- Their ecosystem of influence
- How to create authenticity
- Which media sources and platforms to target

[Read more >>>](#)

WISDOM OF THE CROWD 'SOCIALETHICS' REPORT



Ipsos MORI and Demos call for better ethical standards in social media research, which finds just 38% of the public are aware their social media posts are potentially being analysed for research projects.

Key findings include:

- Public awareness that information on social media can be mined for research is low compared to other uses of social media data such as to target advertising which 57% are aware of, and to personalise the content they see on that network (54%).
- A majority (60%) say they don't think social media companies should be sharing their data with third parties for research purposes.

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ECONOMY AND FINANCE



OPEN API - EXPLORING THE VIEWS OF CONSUMERS AND SMALL BUSINESSES



Barclays commissioned Ipsos MORI to explore consumer and small business perspectives on possible use cases and on the permission based data sharing that would underpin the framework (open APIs).

Key findings include:

- Some potential open API enabled use cases have clear consumer appeal, with aggregation of financial holdings perceived particularly favourably.
- 4 in 10 consumers responded positively to the concept of data sharing via open API.
- There is some caution about sharing personal data such as credit scores and account balances, but a significant number of consumers would be happy to do so.



BUSINESS





THE REPUTATION COUNCIL REPORT



A definitive guide to the latest thinking in the corporate communications world from the Reputation Council – a 114 strong panel of industry professionals

- The council members were asked what proportion of the reputation management work they currently carried out they would describe as 'proactive' – 63% answered 'more than 50%', with three in five of those saying 'more than 75%', for an overall average of 65%.
- When asked how much time would, in an ideal world, be given to proactive reputation management, half of the council members said 'more than 75%', and the overall average stood at 77%.



SOCIETY





ECONOMIST/IPSOS MORI ISSUES INDEX



The November Issues index, conducted prior to the terrorist attacks in Paris, shows that immigration remains the most important issue facing Britain in the eyes of the public.

- It is mentioned, unprompted, by half (49%) of the British public, indeed for three in ten (31%) it is the single most important issue.
- This marks the sixth month in a row in which immigration has been the most important issue, in each instance pushing concern about the NHS into second place.
- This month a third of the public (34%) mention NHS – though this issue has fallen from 47% in April of this year, this still marks the 13th consecutive month that concern about this issue has been at, or higher than, 30%.

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COMING TO TERMS WITH AUSTERITY?



Three out of four Britons say cuts haven't affected them much, but concern about the future of the NHS highest for 13 years

- One in four (23%) say they and their family have been affected at least a fair amount by spending cuts, compared with 33% in 2012.
- Those who feel they have been little affected have grown from 59% to 73%.
- In addition, worry about the impact of spending cuts in the future has also fallen, from 61% in 2012 to 46% now.
- However, that does not mean that Britons have no concerns about the government's policies for public services.
- Four in ten (43%) think that public services have got worse over the last five years.

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SPOTLIGHT ON RUSSIA



A review of state statistics and consumer trends, offering an overview of Russia's current social and economic situation.

Based on 2000-2014 data, this review charts changes in population and consumer behaviour, and forecasts possible future trends.

Key findings include:

- Russia is home to 180 nationalities, who speak 150 languages.
- Across the population of people aged 30+, there are 11 million more women than men overall.
- 34% of Russians agree that “religion does play an important role in my life”, up from 21% in 2000.
- Russia has the highest share of the population globally who have a higher education degree (54%) – ahead of Canada, Israel, the USA and the UK.



COLOMBIA FLAIR: BEYOND THE CLICHÉS



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.

- Written by our Colombian experts, *Colombia 2016: A strong desire to succeed* is the latest report in the *Ipsos Flair* series. It looks at the current situation in Colombia, uncovers new insights and highlights 2016 as a turning point.
- Despite the challenges the developing nation of Colombia faces, the report also highlights the progress it has been making in recent years. It looks at the possibilities for communicating with people in a deeper way, making use of advancements in digital connectivity.
- Colombia follows *Ipsos Flair* reports for Brazil and Thailand, released earlier this year. You can view the full [Ipsos Flair Collection](#) via our website.

PARIS ATTACKS HAVE NOT CHANGED BRITONS' VIEW ON REFUGEES MUCH



This poll reveals British attitudes towards the refugee crisis and its entanglement with national security. It also captures public attitudes both before and after the tragic events in Paris.

Key findings include:

- On the potential threats to Britain post-Paris, the vast majority (95%) of Britons think there is a very or somewhat real threat of a terrorist attack in Britain.
- This represents an increase of ten points on October's figure (85%).
- More than eight in ten Britons (84%) think there is a very or somewhat real threat that Britain will be involved in a war with another country.
- This is a 15 point increase on October's figure (69%).

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VIEWS FROM SCOTLAND



A selection of our latest polls, publications and articles from Ipsos MORI Scotland.

Scots optimistic about the economy in Scotland over next ten years, but expect cost of living to increase

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Scotland's constitutional future seen as the key long-term issue facing the country

[Read more >>>](#)

Scots expect health, social care and police services to get worse in the next ten years

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Conservatives make ground ahead of Holyrood elections while most Scots want to remain in the EU

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POLITICS



LEADER CHANGE BEFORE GE20?



Four in ten think Labour and Conservatives should change leader before 2020's General Election

- Corbyn's period at the helm of the Labour Party continues to attract both supporters and critics.
- Four in ten (42%) think the Labour Party should change their leader ahead of the election, while three in ten (31%) disagree.
- Under Ed Miliband in June 2014, 49% said Labour should change their leader, while 30% disagreed.
- In the wake of Cameron's announcement that he will not seek a third term, four in ten (39%) think the Party should change its leader ahead of 2020.
- In June 2014, this figure stood at a quarter (27%).
- Four in ten (42%) remain satisfied with his performance as PM while 51% are dissatisfied, similar to last month.

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PUBLIC KNOWS LITTLE ABOUT THE 'DEVOLUTION REVOLUTION' - BUT SUPPORTS LOCAL DECISION-MAKING



Despite acknowledging that they know very little about proposals for devolution, the public in England is generally supportive of greater powers being devolved to local government.

Key findings include:

- Citizens trust local government most to make decisions about local services.
- But they know little or nothing about the Government's decentralisation plans.
- Doubts remain about the potential of the Northern Powerhouse to achieve its goals.
- Introducing elected mayors makes little difference in the eyes of the public.

PUBLIC CONFIDENCE IN GEORGE OSBORNE SLIPS – BUT FEW THINK LABOUR WOULD DO A BETTER JOB



With the Autumn Statement approaching the new Political Monitor shows a growing dissatisfaction with George Osborne amongst the British public.

Key findings include:

- One in three (35%) say that they are satisfied with the way he is doing his job as Chancellor of the Exchequer – down nine points from July.
- Half (52%) say that they are dissatisfied – up eight points since after the Summer Budget, which gives him his worst figures since March 2013.
- If given the chance however just 22% think a Labour government led by Corbyn and McDonnell would do a better job at managing the economy.
- Four in ten (41%) think Corbyn and McDonnell would do a worse job (as did 37% of Labour in March), and 28% say there would be no difference.

TWO IN THREE DISAGREE THAT GOVERNMENT HAS THE RIGHT LONG-TERM POLICIES FOR PUBLIC SERVICES



With the next Autumn Statement looming, new polling shows growing public concern about the government's plans for public services.

Key findings include:

- Two in three (67%) Britons disagree the government's policies will improve the state of Britain's public services, up from 60% before the election and at its highest level since 2001.
- Overall, one in three (34%) surveyed say that it is still necessary to reduce the deficit through further spending cuts
- Another one in three (32%) think cuts were necessary in the last parliament but not anymore and 27% think spending cuts were never necessary to begin with.

HOUSING



LONDONERS SAY HOUSING IS NOW THE NUMBER ONE ISSUE FACING THE CAPITAL



Housing is now the number one 'top of mind' issue for Londoners, a poll conducted by Ipsos on behalf of London Councils has found.

- Over half of Londoners (54%) in our latest poll spontaneously mention housing as among the most important issues facing the capital
- An increase of 17 percentage points since 2013 and overtaking transport (which was then 44%) and the economy (22%) as the most-cited issue.
- The poll also finds that Londoners overwhelmingly believe that there is currently a housing crisis in the capital - almost nine in ten (88%) agree, a rise of six percentage points since 2013 (82%).

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IPSOS MORI OPINION





IPSOS MORI OPINION

Like never before, the London mayoral election is going to be about housing

Housing is set to be the battleground as Sadiq Khan and Zac Goldsmith compete to see who can call City Hall "home" in 2016, writes Ben Marshall in the New Statesman.

[Read more >>>](#)

Misperceptions show what is worrying the public

Bobby Duffy, MD of the Social Research Institute, makes the case for businesses being more upfront about how much tax they pay in The Great Business Debate.

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National Arthritis Week

The effect of and concern caused by arthritis and joint pain goes beyond people in their old age, says Debbie Lee Chan, Research Director in SRI.

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IPSOS MORI OPINION

Nothing looks like halting the SNP bandwagon

Mark Diffley, Director of Ipsos MORI Scotland, writes in Holyrood magazine on the state of play approaching the 2016 election.

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Sadiq Vs Zac: How Do Londoners See The Mayoral Candidates?

Paul Carroll summarises the findings from a focus group for the BBC's Sunday Politics London, asking a cross section of the capital's electorate exactly what it is they are looking for in the next mayor.

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The austerity question

As the Department for Communities and Local Government cuts another 30% from its budget, Ben Page asks in the Municipal Journal whether that means the British are resigned to austerity.

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Why isn't housing a more decisive issue in elections?

Housing as an issue of concern to Britons is rising to new heights on the list of voter concerns, writes Ben Page in the Independent.

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NHS: A healthy devolution?

Nicola Moss, of Ipsos MORI North, discusses the prospects for a devolved National Health Service.

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Capital Concerns: The Housing crisis in London

Victoria Harkness blogs in The MJ on the possible reasons why housing is the top issue of concern for Londoners according to our research for London Councils.

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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 methodology details are available via the website links

