



# IPSOS MORI HIGHLIGHTS

September 2015

THE **2015**  
FUTURE  
OF RESEARCH  
SERIES

Ipsos MORI



# WELCOME TO IPSOS MORI'S SEPTEMBER HIGHLIGHTS

If you had told me in May who the new leader of the Labour party and Shadow Chancellor would be, I would have laughed out loud. A reminder that things can change very fast and unpredictably: our data suggests Jeremy Corbyn will have an uphill struggle.

Elsewhere in this issue we have the latest figures on social media and technology use, the things brands need to do to capture consumer attention in an age of interruption, and we look at Britons' record concern about immigration – even before the latest crisis on the borders of the EU in Eastern Europe.

We look at seven day services in the NHS, and the challenges for people living with cancer – which will affect one in three of us in future.

Some good news – “other people” are much better than we think they are – they eat better, exercise more, and save more than we think they do – something communicators might want to reflect on:

our latest analysis from the global Behavioural Insights conference in London last week is here.

We have also included invitations to our upcoming events on major generational shifts with Radio 1, on the impact of trust with Nationwide Building Society and others, on understanding shoppers with Unilever, and on how advertisers and media owners alike need to get more creative – I hope to see you at one or more of these.

Have a great September – do let me know what you would like to see more or less of in future issues.

All best

**Ben Page**

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## OUR EVENTS

- Invitation: The Future of Research: Generation Next
- Invitation - The Trust Dividend
- Invitation - Understanding and Influencing Shoppers
- Invitation - Uniting Media and Creativity in a Connected World

## BRANDS, COMMUNICATIONS & TECHNOLOGY

- Ipsos Connect Tech Tracker Q3 2015
- Creating Travel Partnerships with your Customers
- The Attention Deficit: More screens, more content and how brands can connect

## SOCIETY

- Britons overestimate the bad behaviour of other people
- Concern about immigration at highest level ever recorded

## POLITICS

- SNP increase lead in the run up to 2016 Holyrood election
- EU citizens think things across the Union heading in the wrong direction
- EU citizens hold Greek government responsible for debt crisis

## ECONOMY & FINANCE

- Primary Consumer Sentiment Index up for first time since June
- Lloyds Spending Power Report

## HEALTH

- Exploring the attitudes and behaviours of older people living with cancer
- Motivation for NHS seven-day services misunderstood by many

## IPSOS MORI OPINION

# INVITATION - FUTURE OF RESEARCH: GENERATION NEXT

## 24 SEPTEMBER, CENTRAL LONDON



**At the next in our series of Future of Research events we will explore what makes Generation Next tick.**

Join us on the evening of **24 September** to understand the next generation. We'll examine their attitudes and motivations and explore how to engage them both as consumers and research participants.

We are delighted to be joined by **Patrick Collins**, Head of Youth Audiences from the **BBC** who will share his perspective on how Generation Z consume media and content and how the BBC is responding to their needs.

[Read more >>>](#)

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# INVITATION - THE TRUST DIVIDEND 29 SEPTEMBER, CENTRAL LONDON



At the Reputation Centre Annual Conference we will discuss unlocking value from your reputation. In a digital age of consumer and regulatory scrutiny the relationship between what you stand for and what you sell has never been so important.

Join us on the 29th September at the **London Stock Exchange** to hear how companies are managing the convergence between reputation equity and business performance, as well as welcoming our keynote speaker, **Graham Beale**, Chief Executive of **Nationwide Building Society**.

[Read more >>>](#)



# INVITATION - UNDERSTANDING AND INFLUENCING SHOPPERS, 6 OCTOBER, CENTRAL LONDON



Ipsos Marketing

## Pinpointing Shopper Behaviours and Emotions in the Moment

The grocery market is more competitive than ever, with differentiating retail channels and an ever growing selection of products. Influencing shoppers across different purchase channels, and providing a positive grocery-shopping experience aligned against shopper needs, has never been more important.

Join us on the morning of **6 October** for our dedicated Shopper Marketing event, when we are delighted to be joined by **Iris Cremers**, Senior Insight Manager from **Unilever** to explore how mobile technologies are opening up new ways for manufacturers and retailers to understand and delight shoppers.

[Read more >>>](#)

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# INVITATION - UNITING MEDIA AND CREATIVITY IN A CONNECTED WORLD 20 OCTOBER, CENTRAL LONDON



**At this event we will explore how to stay true to your 'Big Idea' by focusing on uniting media and creativity. Make sure you deliver the right content, in the right context, optimised for all platforms and channels and discover the best ways to measure and evaluate your success.**

Join us for this breakfast event on **20 October** as we discuss the current climate of change in today's media and advertising landscape and how this presents brands with new and, at times, daunting challenges.

Yet, the need to deliver consistent communications and brand messages across all touchpoints and formats still remains.

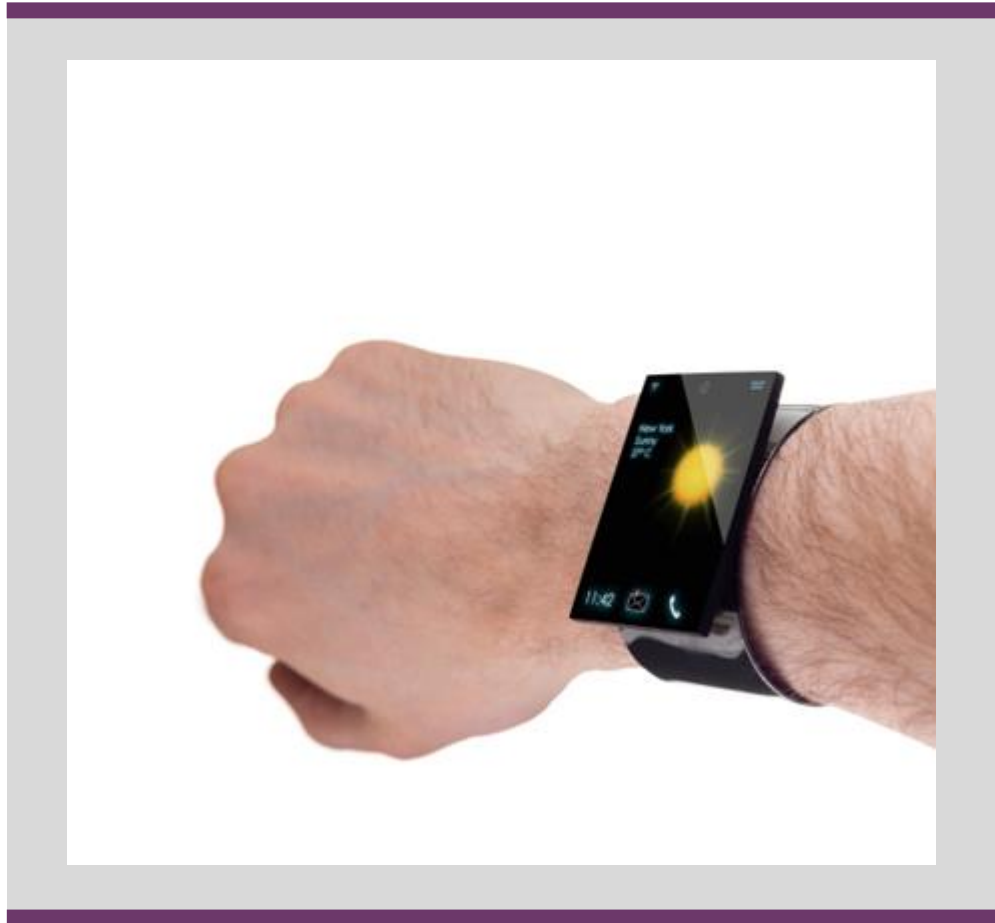
[Read more >>>](#)



# BRANDS, COMMUNICATIONS & TECHNOLOGY



# IPSOS CONNECT TECH TRACKER



## Ipsos Connect's Tech Tracker finds smartphone ownership remains stable at 71%

- Apple iOS penetration has increased and so regained its lead over Android. With Apple's new product announcement due at the start of September this will be a measure to watch next time.
- Our homes are more connected than ever with a quarter of GB households now having a connected TV.
- The way we consume content continues to change over time with unofficial movie downloads having almost doubled over the past year (6% -11%).

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# CREATING TRAVEL PARTNERSHIPS WITH YOUR CUSTOMERS



There can be no doubt the travel industry is embracing mobile technology, finding new ways to help customers and evaluate the travel experience. But are travellers ready to widen their holiday horizons with technology?

- These "postcards" highlight key findings from Ipsos Loyalty's customer tracker exploring travel habits and how mobile technology is now key in the planning and organisation of travel.

[Read more >>>](#)

# THE ATTENTION DEFICIT: MORE SCREENS, MORE CONTENT AND HOW BRANDS CAN CONNECT



Ipsos Connect

## THE ATTENTION DEFICIT:

MORE SCREENS, MORE CONTENT  
AND HOW BRANDS CAN CONNECT

Thought Piece  
2015



The competition to be heard has never been greater. People have access to more content, at more speed and across more devices than ever before. How can brands ensure that they communicate their message clearly across a large number of screens?

This paper will investigate:

- Why a screen sensitive strategy is important when communicating a brand message.
- What the four tactical pillars of a screen sensitive strategy are.
- How data can help you implement a successful screen sensitive approach.

Read more >>>





# SOCIETY



# BRITONS OVERESTIMATE THE BAD BEHAVIOUR OF OTHER PEOPLE



This new survey was conducted by Ipsos MORI in partnership with the Behavioural Insights Team across six countries.

Our study highlights that people in the UK often overestimate the bad behaviours of other people. Key findings are that the British think:

- 69% of their fellow Britons eat more than the recommended amount of sugar, while nutrition surveys show it's actually only 47%;
- 65% of the population are not saving enough for retirement, when government studies suggest it's actually 43%;
- 36% of the population have avoided paying the full amount of tax on income or purchases in the past year, when only 6% admit to it themselves.
- only 42% of their countrymen do the recommended amount of exercise each week, when detailed surveys of physical activity show that 57% do.

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# CONCERN ABOUT IMMIGRATION IS AT THE HIGHEST LEVEL EVER RECORDED



The August Economist/ Ipsos MORI Issues index shows concern about immigration is at the highest level ever recorded.

- 50% of the public mention immigration as among the most important issues facing Britain.
- For 32% it is the single most important issue facing the country.
- This measurement of 50% is an increase of 8 percentage points since July, and this represents the highest level of concern we have ever recorded about immigration – surpassing the 46% recorded in December 2007, as the migrant camps in Calais continue to dominate sections of the media.



# POLITICS



# SNP INCREASE LEAD IN THE RUN UP TO 2016 HOLYROOD ELECTION



As the Scottish Parliament returns from recess and attention begins to focus on next year's Holyrood election, our new poll for STV News shows the SNP continuing to dominate.

- 55% would cast their constituency vote for the SNP in an immediate Holyrood election (up 2 points from January 2015).
- 20% would vote for Scottish Labour (down 4 points).
- Support for the Scottish Conservatives is up by 1 point to 12%.
- While support for the Scottish Liberal Democrats is up 2 points to 7% .

# EU CITIZENS THINK THINGS ACROSS THE UNION HEADING IN THE WRONG DIRECTION



## The Ipsos European Pulse is a survey of citizens in nine European countries

- The majority of respondents (73%) think things across the EU are headed in the wrong direction.
- Fewer than half agree that EU membership has improved their own standard of living.
- Attitudes are most negative among French respondents, with only 15% saying the union is on the right track.
- However, despite these misgivings, few (17%) want to leave the EU.
- Overall the most commonly chosen option (29%) for the future of their country and the EU is to stay in the union but seek to reduce its powers.



# EU CITIZENS HOLD GREEK GOVERNMENT RESPONSIBLE FOR DEBT CRISIS



**An Ipsos survey of citizens of nine European Union countries finds most people hold the Greek government responsible for the ongoing debt crisis.**

- 88% say the Greek government is a great deal, or a fair amount, to blame for the crisis – rising to 94% among German respondents.
- The German government was mentioned by 46%, attracting less blame than the Greek populace, the IMF and the European Commission overall.
- The survey also found broad agreement (61%) that the austerity measures being imposed on Greece are making their economy worse.

# ECONOMY AND FINANCE



# PRIMARY CONSUMER SENTIMENT INDEX UP FOR FIRST TIME SINCE JUNE



**Thomson Reuters/ Ipsos MORI Primary Consumer Sentiment Index (PCSI) for September appears to have rebounded after a two month decline.**

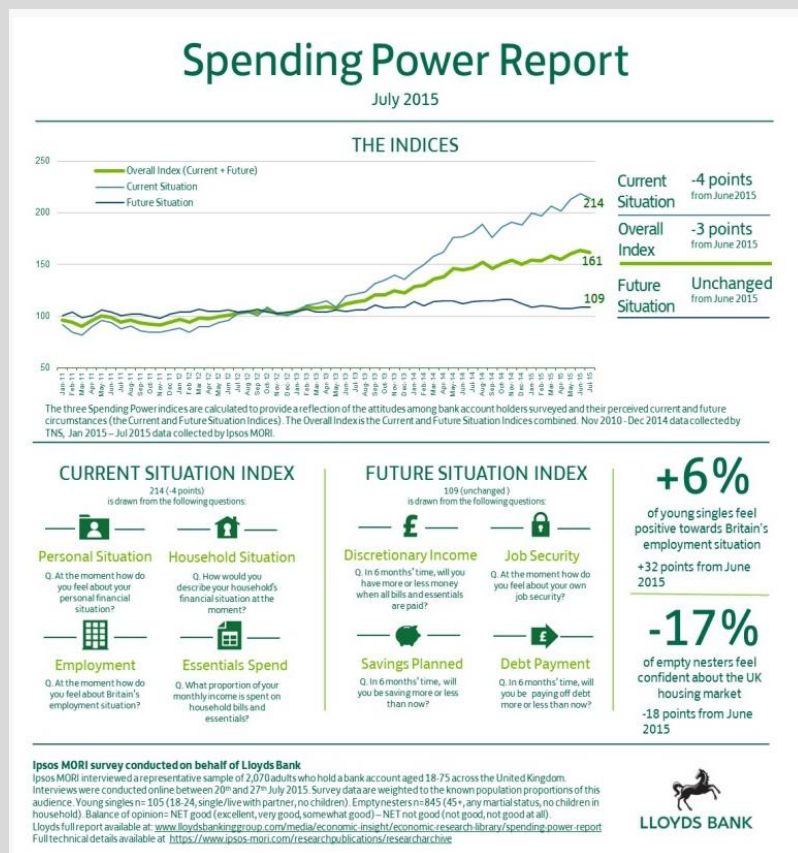
- September figures show the PCSI up 1.4 points from August standing at 53.6.
- Looking further into the sub-indices that make up the PCSI, the growth seen in consumer confidence is strongly driven by perceptions of the current economic climate (up 2.4 points from August).
- More modest gains are seen in perceptions of the current investment climate, a measure of how confident people feel in their ability to invest or save for the future (up 1.5 points), perceptions of job security (up 1.4 points) and future economic expectations (up 1.2 points).

[Read more >>>](#)





# LLOYDS SPENDING POWER REPORT



**The Lloyds Spending Power Report monitors sentiment towards spending, borrowing and saving amongst UK bank account holders aged 18 – 75.**

Key findings include:

- The current situation is down four points from June 2015 – this is made up of questions covering personal and household situation, employment and essentials spend.
- The future situation index is unchanged from June 2015 – this is made up of questions covering discretionary income, job security, savings planned and debt payment.
- 6% of young singles feel positive towards Britain's employment situation (up 32 points from June 2015).
- 17% of empty nesters feel confident about the UK housing market (down 18 points from June 2015).



# HEALTH



# EXPLORING THE ATTITUDES AND BEHAVIOURS OF OLDER PEOPLE LIVING WITH CANCER



**A study for Macmillan Cancer Support aimed to better understand how patient attitudes influence the outcomes of older people living with cancer.**

Some key themes from the report are:

- There are differences in the views of older people with cancer and those who have not been diagnosed with cancer, with those with direct experience of the condition having more positive perceptions about it.
- Some of the preconceptions that people may hold about older people's attitudes have been challenged, for example, older people are no more likely to choose not to have treatment than younger people, and no more likely to be concerned about the consequences of having treatment.
- Older people are more likely than younger people to place trust in their health professionals, but at the same time believe that discrimination against older people does exist (albeit not necessarily in their personal experience).

# MOTIVATION FOR NHS SEVEN-DAY SERVICES MISUNDERSTOOD BY MANY



**The message about why NHS seven-day services are needed is not clear to the public – most people think services are being implemented for reasons of convenience rather than improving weekend mortality rates.**

- The survey shows a quarter of adults in England (25%) believe some services not being available at the weekend is one of the biggest problems facing the NHS.
- While this concern is fairly widespread, it comes lower than a list of other concerns, which is topped by 'long waiting times' (44%), 'a lack of resource generally' (43%) and an ageing population' (36%).
- 'Some services being worse on some days than others' was only seen as an important issue by 15% of the population, despite this being the primary problem that a seven-day health service is designed to solve.



# IPSOS MORI OPINION





## A to-do list for the next Labour leader

Gideon Skinner writes for The New Statesman's Staggers politics blog about what the next Labour leader needs to do to win back former voters in 2020.

[Read more >>>](#)

## A return to the new business as usual

In this blog Ipsos SRI's Mark Diffley discusses the polarising poll between the SNP and Labour in Scotland ahead of the 2016 Holyrood election.

[Read more >>>](#)

## Clarify the quality message to get people behind seven day services

Anna Quigley writes in The Health Service Journal that people would be more engaged with this policy if they understood the safety benefits too.

[Read more >>>](#)

# 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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