

Ipsos MORI Highlights

September 2016

Six in ten prefer to be British rather than any country on earth – but ashamed about drinking too much!

No sign of 'Bregret' after the EU Referendum – or changing positions

Honeymoon continues for Theresa May



WELCOME TO SEPTEMBER HIGHLIGHTS

As we head into Autumn, Britain remains in a state of “phoney war” – the economists’ and bankers’ predictions of a slow down have not yet been noticed by consumers, who are now more positive about the near term each month, although input prices are up by 8% for manufacturers, and consumer concern about price rises is mounting. Currently Theresa May’s honeymoon continues, with no sign of the public changing their mind about Jeremy Corbyn.

On Brexit, both Remain and Leave voters show no sign of “Bregret”, but are also diametrically opposed over trade offs between single market access and free movement of people; someone is going to be disappointed in due course. At an event I was at recently, with Boris Johnson, the UK Foreign Secretary, the Italian minister listening simply said “There is no chance Boris will get everything he wants”!

Elsewhere this month we look at consumer attitudes to animal testing – where there is support if it is necessary, and on beauty and grooming we explore the pressure women and men feel to be well presented, and possible future changes in attitudes, with a quarter of men expecting make up to become the norm for them in future!

While immigration remains a key concern in Britain, this month we have the highest concern about housing in 40 years, and in London, a centre of building frenzy, increasing concern about the over 400 towers now under construction. Six out of ten Londoners want restrictions on where towers are built. At the same time in Britain as a whole, 88% agree there is a housing crisis and acceptability of house building is rising.

Finally despite our anxieties, 60% of us would rather be British than any other country on earth, and we are proud of the NHS and our monarchy (but not business – only 4% of us think British business makes them proud). Personally our best points are our sense of humour, manners and tolerance, but we are ashamed of our drinking, ignorance of other cultures and constant complaining...

I’ll stop there. There’s much more inside.

Ben Page
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IPSOS MORI'S SEPTEMBER HIGHLIGHTS



POLITICS & ECONOMY

- Optimism over the economy improves for the second month in a row – but young are still more pessimistic
- The honeymoon continues for Theresa May as most remain satisfied in her performance as Prime Minister
- Corbyn struggles to win support from Labour MPs
- Concern about Europe falls in the second month following Brexit vote
- Brexit does not trigger significant increase in support for Scottish independence
- Just over a year after becoming Lib Dem leader Tim Farron still to make a breakthrough with the public
- Northern Ireland border poll 2016



INTERNATIONAL

- It's nativism: explaining the drivers of Trump's popular support



SOCIETY

- Six in ten prefer to be British than of any country on earth
- Women still face more pressure to look groomed
- The poverty premium in Scotland
- Most support research on animals – if necessary
- Mixed views on the refugee crisis among Scots



HOUSING

- Concern over housing rises again
- Londoners support restrictions on new tall buildings



MEDIA, BRANDS & COMMUNICATIONS

- Virtual reality - immersive storytelling
- Pokémon go
- Effective communications begin with the brand
- Feeding the machines: a prognosis for programmatic



OPINION

- It's good to talk: organ donation and the importance of making your wishes known
- Blog: Britain after the Referendum: what next?
- Does the public back devolution?
- How Nicola Sturgeon could win a second independence referendum



EVENTS

- Britain after the Referendum: what next?

POLITICS



Ipsos MORI



OPTIMISM OVER THE ECONOMY IMPROVES FOR THE SECOND MONTH IN A ROW – BUT YOUNG ARE STILL MORE PESSIMISTIC



Ipsos MORI's September 2016 Political Monitor shows public expectations over the economy continue to improve after hitting a low in July following Britain's shock decision to leave the European Union.

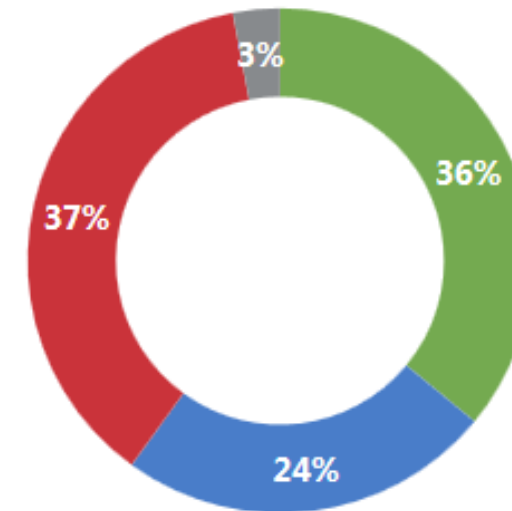
Key findings include:

- Figures show that 36% believe the economy will improve over the next 12 months (up 8 points) compared with 37% who believe it will get worse (down 6 points) – leaving a net Economic Optimism Index score of -1 (up 14 points). One in four (24%) believe it will stay the same.
- This is the highest score since December 2015.
- The poll also reveals differences in economic optimism between different segments of British society.
- A large generational gap exists with older Britons more optimistic about Britain's economic future than younger ones.
- Just under half (46%) of those aged 55+ think things will improve in the next 12 months (29% think things will get worse) compared with three in ten (29%) 18-34 year olds (42% think things will get worse).

[Read more ...](#)

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?

September 2016



IMPROVE	36%
STAY THE SAME	24%
GET WORSE	37%
DON'T KNOW	3%
EOI = -1	

Base: 1,000 British adults 18+, 10th – 14th September 2016

THE HONEYMOON CONTINUES FOR THERESA MAY AS MOST REMAIN SATISFIED IN HER PERFORMANCE AS PRIME MINISTER



As party conference season begins new Ipsos MORI polling reveals the public remain more positive about the new Prime Minister than they do Jeremy Corbyn on many key leader image attributes.

Key findings include:

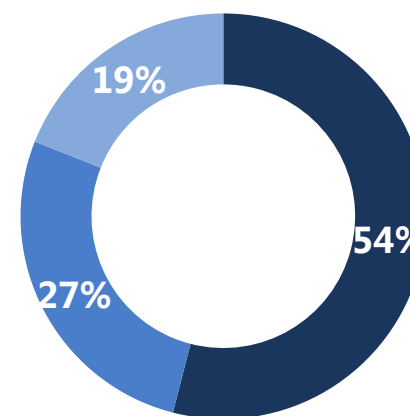
- Theresa May continues to enjoy her honeymoon period with more than half (54%) of Britons satisfied with her performance as Prime Minister and 27% saying they are dissatisfied – leaving her a net satisfaction score of +27 (although down by 8 points from last month).
- Jeremy Corbyn however continues to struggle with public approval with 27% satisfied in him doing his job as leader of the Labour party and three in five (58%) dissatisfied - leaving him a net score of -31 (up 2 points).
- Two in three (68%) say Mrs. May is a 'capable leader', compared with 24% saying the same for Jeremy Corbyn
- Honesty however appears to be a quality Mr. Corbyn does lead Mrs. May on. More than half (52%) say the Labour leader is 'more honest than most politicians' compared with 44% saying this of Theresa May.

[Read more ...](#)

Are you satisfied or dissatisfied with the way Theresa May is doing her job as Prime Minister?

Are you satisfied or dissatisfied with the way Jeremy Corbyn is doing his job as leader of the Labour party?

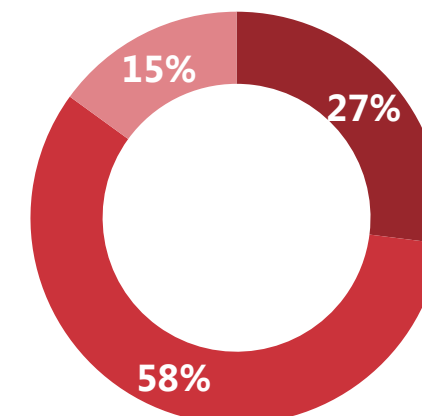
September 2016 (All)



SATISFIED	54%
DISSATISFIED	27%
DON'T KNOW	19%

Net = +27

Base: 1,000 British adults 18+, 10th – 14th September 2016



SATISFIED	27%
DISSATISFIED	58%
DON'T KNOW	15%

Net = -31

Base: 1,000 British adults 18+, 10th – 14th September 2016

CORBYN STRUGGLES TO WIN SUPPORT FROM LABOUR MPS



Theresa May (25%) and David Cameron (26%) have been voted the most impressive parliamentarians by their fellow MPs in the annual Ipsos MORI survey of MPs.

Key findings include:

- This follows a general trend seen over the course of the survey of MPs naming their current party leader as the most impressive parliamentarian.
- However, in contrast, mentions of the Labour party leader by Labour MPs have been in decline in recent years, and **Jeremy Corbyn** receives a record low number of mentions this year, with just one mention from a Conservative MP.
- The MP seen as most impressive amongst Labour MPs is in fact Theresa May, receiving 35% of mentions.
- Reflecting his difficult relations with the Parliamentary Labour Party (PLP), Corbyn's low number of mentions is in contrast to those of previous leaders **Tony Blair**, **Gordon Brown** and **Ed Miliband**. Brown is the party leader who received the highest proportion of mentions amongst his own MPs over the course of the survey, receiving 60% of mentions in Summer 2007 (39% among all MPs).

[Read more ...](#)



CONCERN ABOUT EUROPE FALLS IN THE SECOND MONTH FOLLOWING BREXIT VOTE



After reaching a record level of concern in July following Britain's decision to leave the EU, fewer Britons now show concern about the EU, according to Ipsos MORI's August Issues Index.

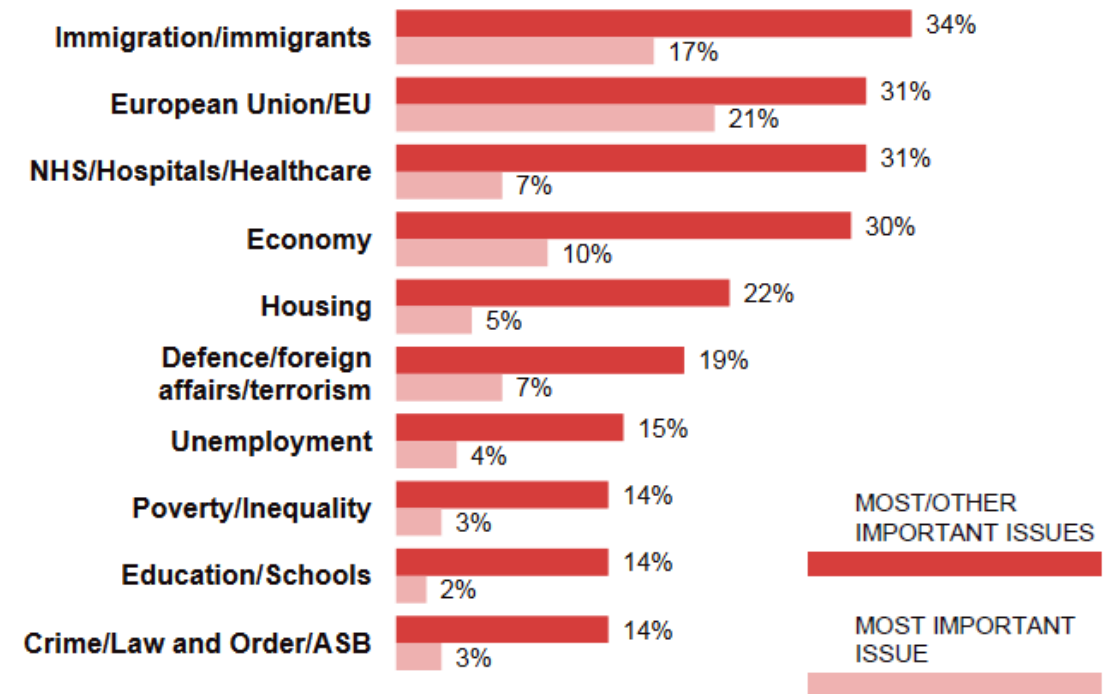
Key findings include:

- Three in ten (31%) now say they are concerned about the EU – down 9 points from July – although it is still seen as the single most important issue (mentioned by 21% as their most concerning issue).
- Immigration has once again taken the top spot with one in three (34%) saying it was a concern (down 4 points from last month) despite being at its lowest level since March 2015.
- Immigration remains particularly relevant for Conservative voters with 45% mentioning it as their concern compared with just one in four (24%) Labour voters.

[Read more ...](#)

What do you see as the most/other important issues facing Britain today?

Top mentions %



Base: 983 British adults 18+, 1st – 11th August 2016

BREXIT DOES NOT TRIGGER SIGNIFICANT INCREASE IN SUPPORT FOR SCOTTISH INDEPENDENCE



In the wake of the UK voting to leave the EU against the wishes of the majority of Scots, our new poll for STV News suggests that Brexit has not caused an upsurge in support for a second independence referendum being held.

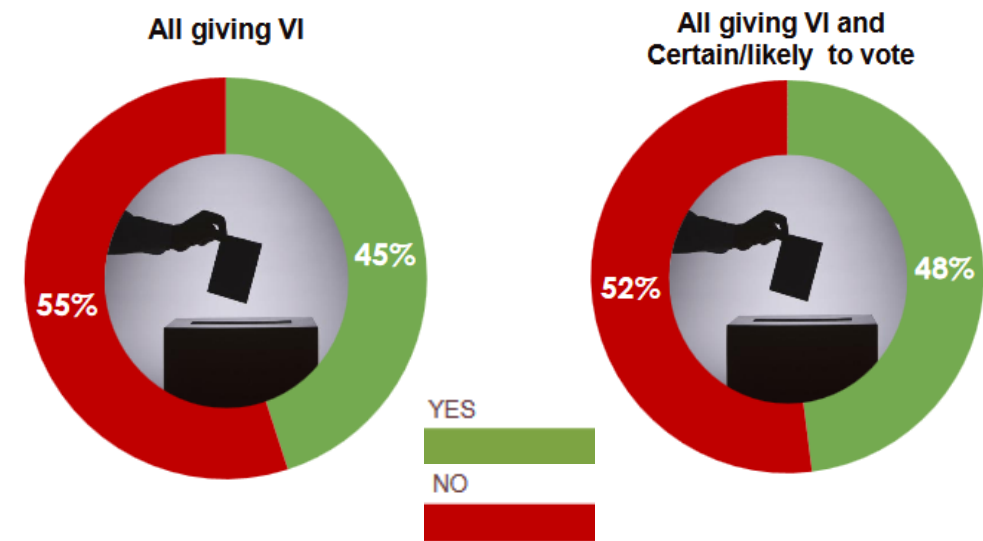
Key findings include:

- Among those who expressed a voting preference and who would be very likely or certain to vote in an immediate referendum, 48% said they would support independence while 52% would back Scotland remaining in the UK.
- And support for indyref2 being held in the next two years has fallen from 48% in our last STV News poll before the Brexit vote in June, to 41% now. Over the same period, opposition to such a move has grown to 54%, 10 points higher than the recorded in June. Unsurprisingly, there are deep divisions on this issue, with 84% of 'Yes' voters supporting indyref2 while 92% of 'No' voters oppose the idea.
- Elsewhere there has been a significant shift in the public perceptions of the First Minister Nicola Sturgeon and the leader of the main opposition party, Conservative leader Ruth Davidson.

[Read more ...](#)

If a referendum were held tomorrow about Scotland's constitutional future, how would you vote in response to the following question: should Scotland be an independent country?

Top mentions %



Base: All giving voting intention = 914. All certain to vote = 831; Data collected among 1,000 Scottish adults 16+, 5th-11th September 2016

JUST OVER A YEAR AFTER BECOMING LIB DEM LEADER TIM FARRON STILL TO MAKE A BREAKTHROUGH WITH THE PUBLIC



As the Liberal Democrats kick-off their party conference Ipsos MORI polling finds Tim Farron and his party still unable to make much headway with the British public, with ratings little changed from a year ago.

Key findings include:

- Just one in five (22%) Britons say they are satisfied with how Tim Farron is doing his job as leader of the party while one in three (33%) say they are dissatisfied leaving him with a net satisfaction score of -11. This is very similar to his rating a year ago of -7.
- Further, almost half (45%) surveyed said that they 'don't know' indicating the public are still unfamiliar with Mr Farron a year on after taking leadership of the party.
- When asked to compare Tim Farron with the Liberal Democrat party 23% stated that they like Mr. Farron (down 1 point from September 2015) and just under half (46%) say they don't like him (up two points).

[Read more ...](#)

**Which of these statements comes closest to your views of...
Tim Farron and the Liberal Democrat Party?**

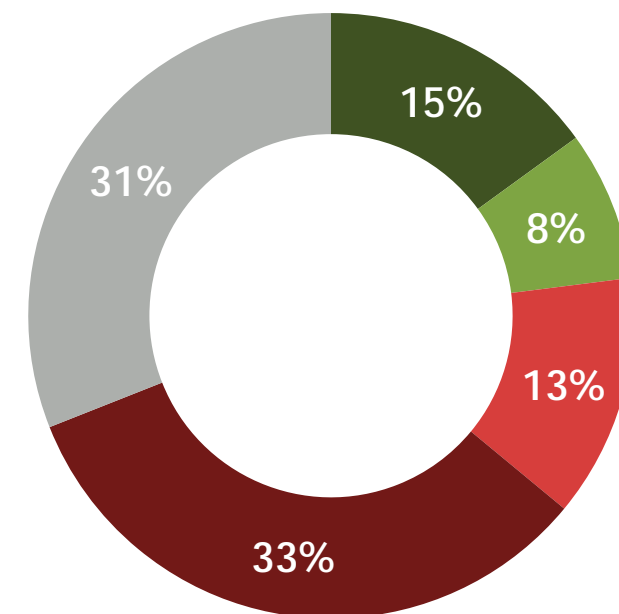
I LIKE HIM AND I
LIKE THE PARTY

I LIKE HIM BUT I DO
NOT LIKE THE
PARTY

I DO NOT LIKE HIM
BUT I LIKE THE
PARTY

I DO NOT LIKE HIM
AND I DO NOT LIKE
THE PARTY

DON'T KNOW



Base: 1,000 British adults 18+, 10th – 14th September 2016

NORTHERN IRELAND BORDER POLL 2016



Ipsos MORI carried out a survey for BBC Northern Ireland's The View programme on public attitudes towards a border poll and how the public might vote.

Key findings include:

- More than eight out of 10 people in Northern Ireland say the UK's decision to leave the European Union has not changed the way they would vote in a future border poll.
- However, this survey reveals that less than a fifth of the people say the Brexit decision has influenced how they would vote in a referendum to decide whether Northern Ireland remains in the UK or joins the Irish Republic.
- A third of those interviewed (33%) want the government to call a border referendum.
- However, more than a half (52%) oppose such a move. Opposition was strongest among those with a Protestant background with 72% against holding a border poll.

[Read more ...](#)



INTERNATIONAL



Ipsos MORI



IT'S NATIVISM: EXPLAINING THE DRIVERS OF TRUMP'S POPULAR SUPPORT



A year ago who would have believed it—Trump the presumptive nominee for the Republican party! For the longest time, most expected Trump would implode. But to the prognosticators chagrin this did not happen.

First and foremost, the basis for Trump's popular support is nativist, anti-immigrant, and America-first in nature. All other possible factors are secondary or tertiary in importance.

Put differently, Trump supporters see all the ills of the world through the prism of immigration and its perceived negative impact on their lives. Trump, in turn, has offered himself as a solution to this problem.

Second, many analysts understand Trump's anti-immigrant rhetoric as really a symptom of a more profound problem of globalization and the corresponding economic dislocation that comes with it.

From this perspective, Trump, Brexit and Western Europe's right-wing parties can all be understood in economic terms: immigrants are perceived as the cause of long-term economic uncertainty.

[Read more ...](#)



SOCIETY



SIX IN TEN PREFER TO BE BRITISH THAN OF ANY COUNTRY ON EARTH



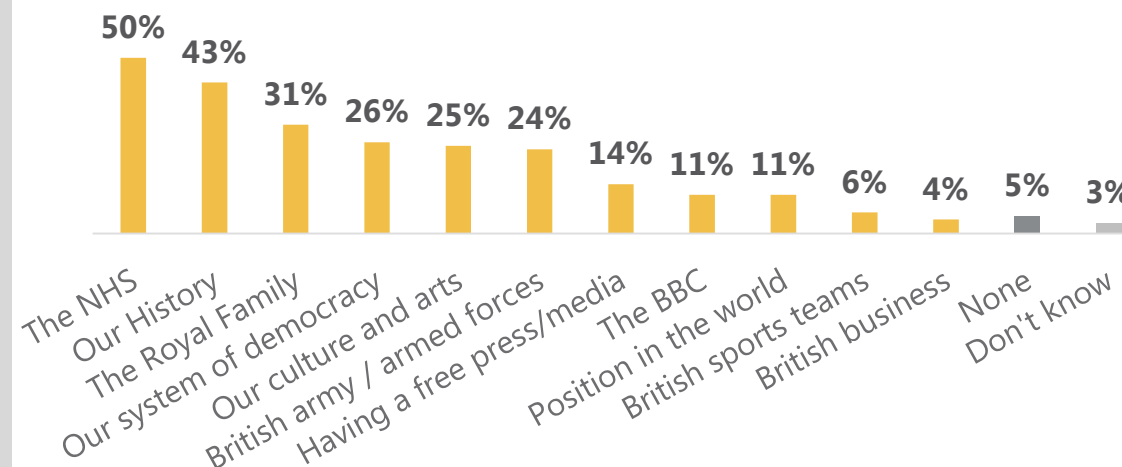
Six in ten British citizens agree they would rather be a citizen of Britain than of any other on earth, according to new research among 1,052 British Citizens.

Key findings include:

- Six in ten British citizens agree they would rather be a citizen of Britain than of any other on earth, according to new research by Ipsos MORI.
- **Best and worst of Britons**
Despite preferring to be British rather than any other nationality, stereotypical “British” characteristics are still alive and well, the research shows, with the common image of drinking too much coming out as the worst (42% say this) from a given list. On the positive national characteristics, having a good sense of humour is in the lead (47%), followed by good manners and politeness (40%).
- **NHS makes us most proud**
The study also finds the NHS tops the list of things that make us most proud to be British. Half of British citizens (50%) say the NHS makes them proud, putting it ahead of Our history (43%) and the Royal Family (31%).

[Read more ...](#)

Which two or three of the following, if any would you say makes you most proud to be British? Please select up to 3 options.



Base: 1,052 British Citizens aged 16-75 across the UK. Interviews were conducted online, from 26th-29th July 2016

MIXED VIEWS ON THE REFUGEE CRISIS AMONG SCOTS



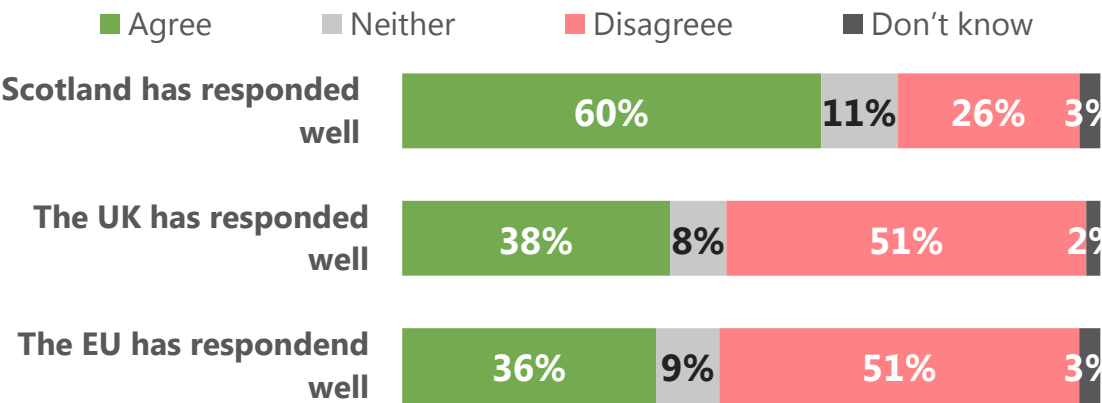
A new poll provides a mixed picture of Scots' attitudes to the refugee crisis, however the majority believe that Scotland has responded well.

Key findings include:

- A clear majority (60%), believe that Scotland has responded well to the refugee crisis, compared to 38% who think the UK has responded well and 36% who think the same about the EU.
- And more than half of us (57%) agree with the statement that refugees entering the UK will 'successfully integrate into their new society', more than in any other European country included in the research.
- Similarly, 72% disagree that 'we must close our borders to refugees entirely' which is among the lowest of the countries included.
- However, nearly half of Scots (47%) agree with the statement that most foreign people wanting to enter the UK 'just want to come here for economic reasons' while a clear majority (58%) agree that 'there are terrorists pretending to be refugees who will enter my country to cause violence and destruction.'

[Read more ...](#)

Response to the refugee crisis.



Base: 1,000 respondents aged 16+, Interviews were conducted by telephone, from 5th – 11th September 2016

WOMEN STILL FACE MORE PRESSURE TO LOOK GROOMED



Whilst 85% of women and 78% of men agree women should be equal to men in society, nearly all women (90%) and 77% of men think that that society puts more pressure on women than men to look groomed, the findings show.

Key findings include:

- **Changing attitudes** - Widespread agreement that it is unacceptable for employers to place strict regulations on how their staff present themselves in the workplace. Some 77% women and most men (58%), disagree with women being required to wear high heels as part of a uniform code
- **Body worries** - Women worry more about personal grooming, and have more worries than men on average, the results show. On average women report 4.3 different worries about their bodies compared to men's 3.5.
- **The future: Unisex or mind the gender gap?** - Looking to the future people are generally in agreement that personal care products will be (even) more gender targeted, rather than move towards being unisex. However, men are slightly more likely to think that the future of care products will be genderless – 16% say more products will be unisex compared with 10% of women.

[Read more ...](#)



THE POVERTY PREMIUM IN SCOTLAND



Ipsos MORI was commissioned by Citizens Advice Scotland (CAS) to conduct research on the 'poverty premium' in Scotland.

Key findings include:

- The findings of the research highlighted evidence of a poverty premium among low-income households, who were more likely than higher income households to use expensive payment options such as electricity prepayment meters (PPMs) and pay as you go mobile phones.
- Low earners were also more likely than those on a higher income to use more expensive types of credit, such as those offered by pawn brokers, and less likely to use credit cards or take out bank or building society loans.
- The research also provided clear evidence that living on a low income had significant impacts on those affected. These included a need to cut back on other areas of expenditure, including spending on food; and a number of more 'personal' impacts, from health problems to relationship difficulties.

[Read more ...](#)



ATTITUDES TO ANIMAL RESEARCH IN 2016

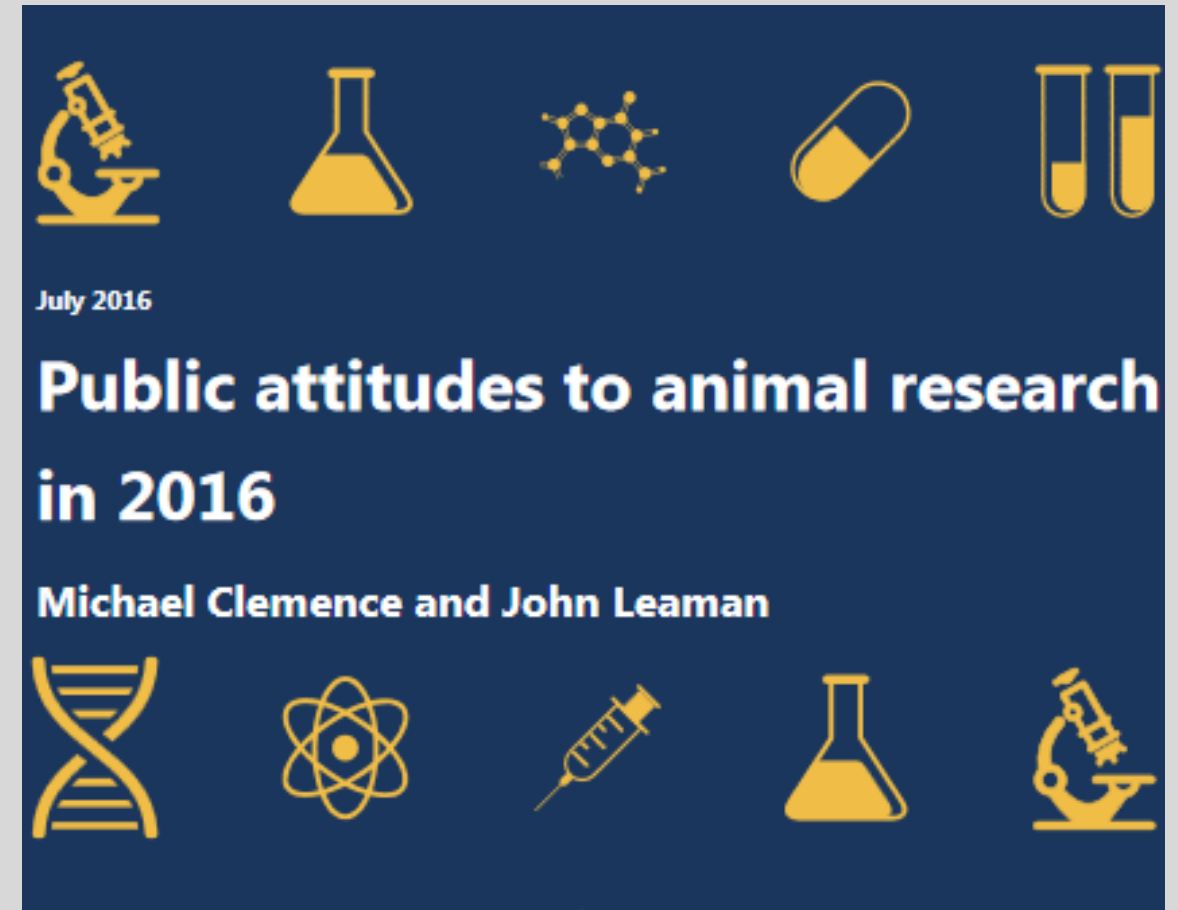


This report presents the findings of a 2016 survey on current public awareness of, and attitudes towards, the use of animals in research.

Key findings include:

- A majority of the public do not feel well-informed about the use of animals in research in the UK – only one third (34%) say they feel either very or fairly well informed, a similar finding to 2014 when 30% felt well informed.
- Two thirds (65%) say they can accept the use of animals in research as long as it is for medical purposes, and there is no alternative. Public acceptance has remained at the same level since 2014, when 68% said the same thing.
- Many people continue to believe that cosmetics testing on animals is allowed in the UK (35% - up from 31% in 2014) although testing cosmetic products and their ingredients on animals was banned in the UK in 1998 and across the EU in 2013.

[Read more ...](#)



HOUSING



Ipsos MORI



CONCERN OVER HOUSING RISES AGAIN



Concern over housing reaches its highest in more than 40 years, according to Ipsos MORI's August Issues Index.

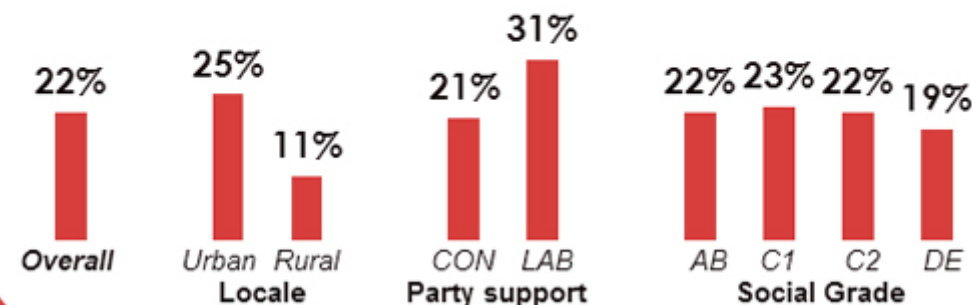
Key findings include:

- Housing has moved up by two places and is cited as a concern by 22% (up 6 points from July) - its highest recorded score on the Issues Index since October 1974.
- Housing is a particular concern amongst younger people where one in four (26%) 18-34 year olds mentioned it compared with 17% of those aged 55+. Those in Greater London also express housing concerns, where it is mentioned by 44%.
- Differences amongst tenure type are also worth noting; renters are more likely to mention housing as a concern (27%) than those either paying a mortgage (22%) or who own their home outright (14%).

[Read more ...](#)

What do you see as the most/other important issues facing Britain today?

Concern about housing by key demographic groups:



Base: 983 British adults 18+, 1st – 11th August 2016

LONDONERS SUPPORT RESTRICTIONS ON NEW TALL BUILDINGS



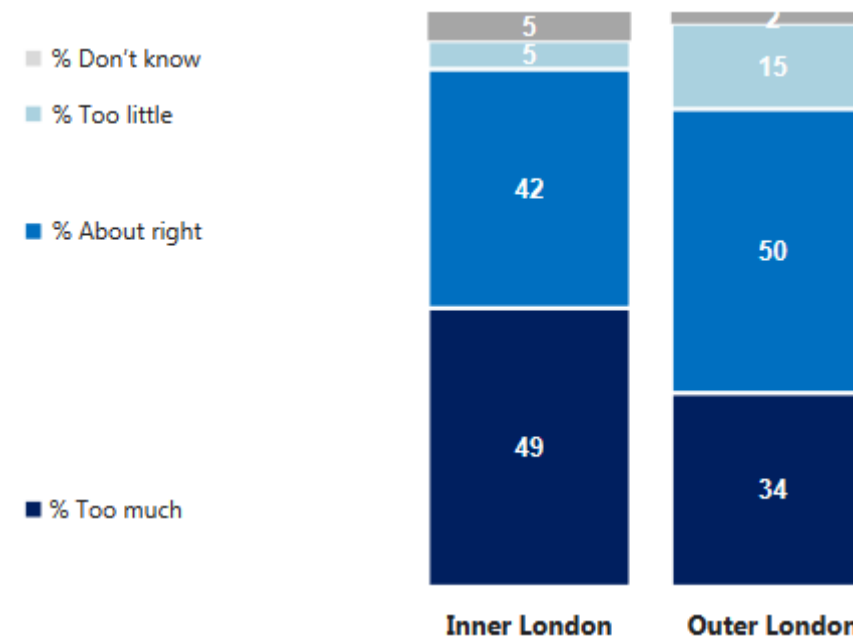
Most Londoners think tall buildings should only be built in areas like the City and Canary Wharf, and that there should be limits on how high they can be, according to an Ipsos MORI survey for the Skyline Campaign.

Key findings include:

- Almost half (49%) of residents of inner London boroughs think that the 270 tall buildings planned, proposed, or under construction in London is too many.
- This contrasts with 34% of people in outer boroughs who say the same.
- Latest data released after the research was conducted indicates more than 400 new tall buildings are planned, proposed or under construction.
- People in inner London are also more likely to say they are worried about how many tall buildings are being built – 43% say this compared to 33% of outer London residents.
- Additionally, the study finds Londoners are unconvinced about the role of tall buildings in meeting the Capital's housing needs; terraced houses (24%) and low-rise purpose built flats (21%) are thought to be the most suitable buildings to meet the needs of Londoners.

[Read more ...](#)

Do you think the number of new tall buildings over 20 storeys currently under construction, planned or proposed is too much, too little or about right?



Base: 504 adults 15+ in Greater London, 29 Jan - 26 February 2016;
Inner London (186), Outer London (318)

MEDIA BRANDS & COMMUNIATIONS



Ipsos MORI



VIRTUAL REALITY - IMMERSIVE STORYTELLING



Virtual Reality (VR) - Which sectors have the biggest appeal for consumers?

There is a general perception that gamers are the main target audience for virtual reality (VR) experiences, and our research finds this opinion is shared by 60% of participants. There is an emerging awareness of VR in the UK, with 59% of men boasting a strong understanding of VR, compared with 46% of women.

The VR platform is constantly evolving and we predict the future of research in this field will quickly be applied to:

VR focus groups and interviews - allowing diverse groups of participants to come together in a malleable environment

In-store and in-situ experiences - being able to control and change environments

New product development - allowing pack ideas to be better explored without the development of full prototypes

[Read more ...](#)





The latest game sensation has been making a big splash in a number of interesting ways. Ipsos has been investigating what it means.

It's the latest craze that has swept the world since its launch in July. But what does this mean for the retailers of the UK, and users in North America?

It would appear that Nintendo's Pokemon Go game has persuaded shoppers to return to the high street in Great Britain. Players are visiting towns, landmarks, shops and restaurants in search of Pokemon monsters. And therein lies the secret weapon that the high street could benefit from – a drive in sales.

Tips for retailers:

- turn your store or venue into a PokeStop to increase footfall.
- purchase a 'Lure' which turns a store or location in to a specialPokeStop for 30 minutes at a time. By becoming a PokeStop in the first week of the launch, Maxwell's Bar in Covent Garden, London, reported a 26% increase in customers.

[Read more ...](#)



EFFECTIVE COMMUNICATIONS BEGIN WITH THE BRAND



People don't remember ads; they remember stories.

We all remember great ads. But do we remember what they were trying to sell us? This is the No. 1 aim for advertising, But, surprisingly, many marketers don't achieve it.

Marketers must start with the brand in the earliest conception stage, and weave it throughout the storyline architecture at opportune points. There are several tried and true techniques to ensure success.

How To Integrate The Brand:

- **Brand Presence:** Recognisable brand shots or mentions at pivotal moments
- **Distinctive Memory Structures:** Elements—celebrities, jingles, tonality—that help identify the brand
- **Story Conclusion:** The brand resolves the story tension.

[Read more ...](#)

FEEDING THE MACHINES: A PROGNOSIS FOR PROGRAMMATIC



“Programmatic” media buying can be defined as the use of software programmes to buy advertising space.

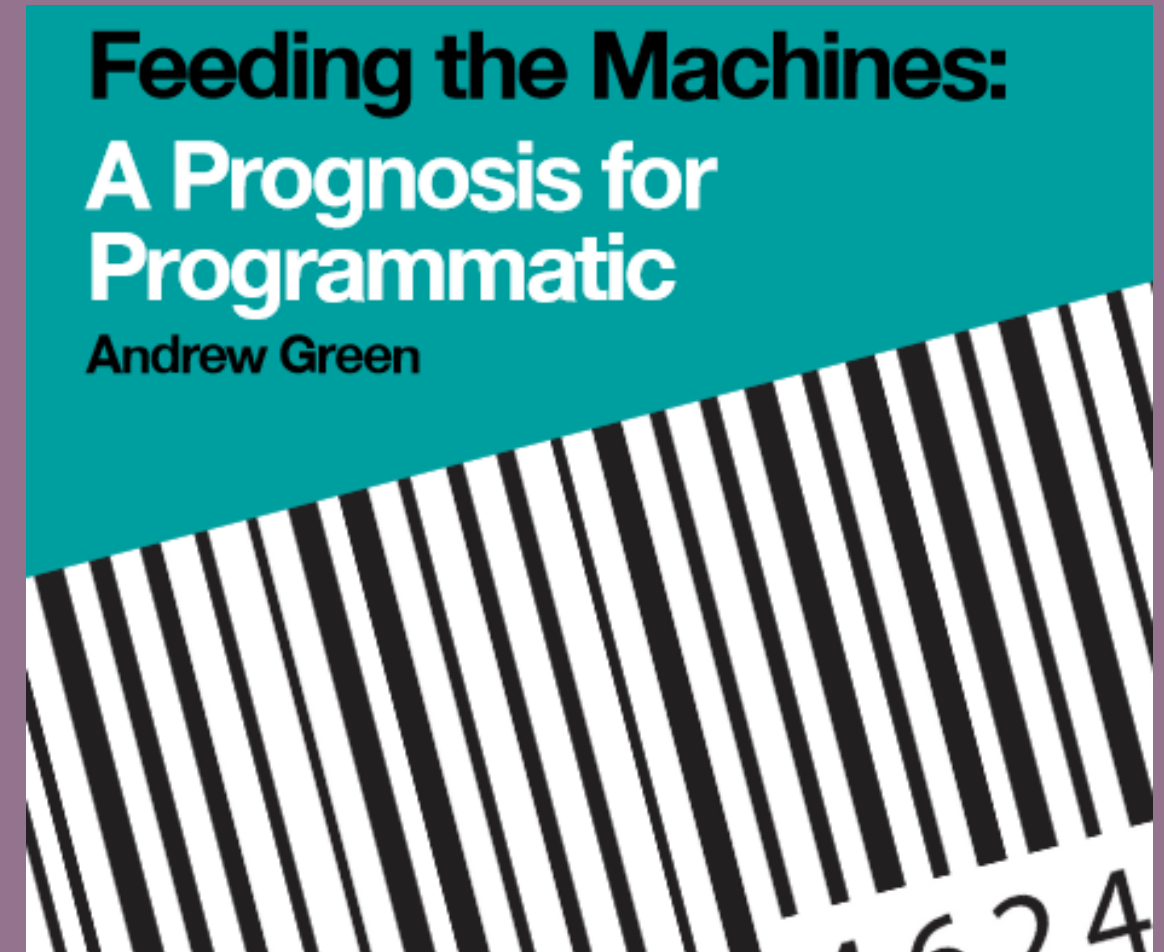
Programmatically traded media represents less than 4% of total ad spend. This is about one-third the size of printed newspaper ad revenues, half the size of radio and 10% of the television total.

On a good day, programmatic technology enables media buyers to save time, increase efficiency and improve effectiveness. On a bad day, programmatically targeted advertising will be seen by almost nobody, as a result of ad blocking, fraud and viewability issues.

Whatever day it is, programmatic technology will continue to grow strongly and will begin to make its presence felt beyond the digital space – in television, radio, Out of Home, newspapers and magazines.

At the end of the day, brands live inside people’s minds. So it is people’s minds we, as market researchers, must seek to understand and to help brands influence.

[Read more ...](#)



EVENTS



Ipsos MORI



BRITAIN AFTER THE REFERENDUM: WHAT NEXT?



Earlier in the month we examined what the EU referendum result meant for the economy, British identity and business at our event 'Britain after the Referendum: what next?'

We released our latest research on the reasons behind how Britain voted, and presented findings from our major new survey across 20 countries on international perceptions of Brexit, and future co-operation.

Speakers:

Rt Hon Nick Clegg MP

Member of Parliament for Sheffield Hallam

Paul Drechsler

President, Confederation of British Industry

Tim Montgomerie

Columnist, The Times

Polly Toynbee

Columnist, The Guardian

Ben Page

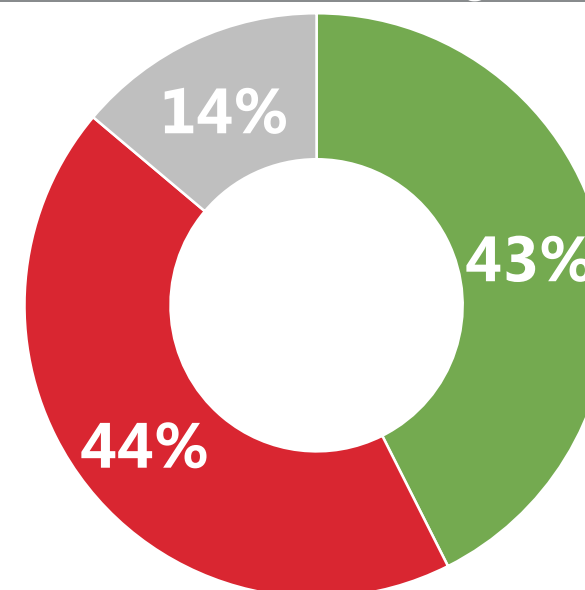
Chief Executive, Ipsos MORI

[Watch video ...](#)

[Read more ...](#)

As you may know the United Kingdom voted to leave the European Union. Do you think that was the right decision or the wrong decision for the United Kingdom?

All



Right decision

Wrong decision

Don't know

Base: 1,077 online GB adults aged 18-75 29th– 30th June 2016 (426 leave voters and 548 remain voters)



Ipsos MORI

OPINION



Ipsos MORI



IPSOS MORI OPINION



It's good to talk: organ donation and the importance of making your wishes known

For Organ Donation Week, **Josie Lloyd** and **Charlotte Simms** blog on recent Ipsos MORI polling on organ donation and whether it aligns with current legislation.

[Read more ...](#)



Britain after the Referendum: what next?

A panel of **Rt. Hon. Nick Clegg MP, Polly Toynbee, Tim Montgomerie, Paul Drechsler** and **Ben Page** discussed life in Britain after the Referendum.

[Read more ...](#)



Does the public back devolution?

As Theresa May settles in to 10 Downing Street, **Ben Page** writes in the Municipal Journal on public views of devolution.

[Read more ...](#)



Ipsos MORI

IPSOS MORI OPINION



How Nicola Sturgeon could win a second independence referendum

Support for independence is higher than at the start of the first Scottish referendum campaign, writes **Mark Diffley** for the New Statesman.

[Read more ...](#)



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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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