



IPSOS MORI HIGHLIGHTS

February 2016

**Spring is
coming!**



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WELCOME TO IPSOS MORI'S FEBRUARY HIGHLIGHTS

In this issue we look at our polling on the EU referendum that will dominate British politics this year – 87% of the FTSE 500 firmly want Britain to stay in the EU, and so do public, although they are much more equivocal, and the number who want to leave is rising.

Much will hinge on the trustworthiness and credibility of the different sides: our latest Veracity Index suggests both sides would be wise to get hairdressers to speak up for them: 69% of us trust them to tell the truth, versus 19% for politicians. The latter figure hasn't changed much for decades, but civil servants are now trusted by half the population – double the figure of 1983. About half of you trust me – pollsters' ratings are unchanged at 53% since 2014.

In politics, the Conservatives remain firmly ahead of Labour, and have just recorded the largest lead in terms of the perceived calibre of their leaders, compared to Labour, since 1989 when Mrs Thatcher was Prime Minister.

Elsewhere we look at the global addiction to smartphones (200 or more views a day is common, with 40% of Chinese youth feeling 'uneasy' if they don't look every 20 minutes), and we consider which generation British women think 'have it all'.

There's also information on the economy, housing, GP services (still holding up, despite pressures) and lots more.

We hope you enjoy it – tell us what you think!

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IPSOS MORI FEBRUARY HIGHLIGHTS

MEDIA, BRANDS & COMMUNICATIONS

- China Pulse: Young people and mobile internet
- Clearing the Fog on Neuroscience

ECONOMY & BUSINESS

- Senior business figures optimistic about business prospects for 2016
- More than four in five business leaders hope for “remain” vote in EU referendum
- Economic Optimism at its lowest level since April 2013

POLITICS

- “Remain” in EU still ahead although lead has narrowed
- Conservatives take their biggest lead over Labour
- Most Britons think country is on the wrong track
- Survey of MPs on the European Union
- Northerners' views on the Northern Powerhouse

SOCIETY

- Economist/Ipsos MORI Issues Index
- The blame game? Women's views on generational strife and solidarity
- Preparing for later life; working longer and saving more
- Connected driving: public appetite but concern about safety
- Politicians are still trusted less than estate agents, journalists and bankers
- Global Warming: Uniting world opinion

HEALTH

- Latest GP Patient Survey results released

HOUSING

- People underestimate past house price rises

IPSOS MORI OPINION



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MEDIA, BRANDS AND COMMUNICATIONS



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CHINA PULSE: YOUNG PEOPLE AND MOBILE INTERNET



Presenting the results of a recent survey of 18-30 year olds in China, this report looks at how young people there relate to the mobile internet.

- Some 80% of China's online youth say they feel uneasy not checking their mobile phones in an hour and 40% say they look at their phone every 20 minutes or more.
- The report concludes by highlighting what these results mean for brands.
- The latest quarterly edition of China Pulse also provides briefings on:
 - Running: A new lifestyle
 - Macro economy data in China
 - Best of the best 2015: Quality of Life report including luxury consumption

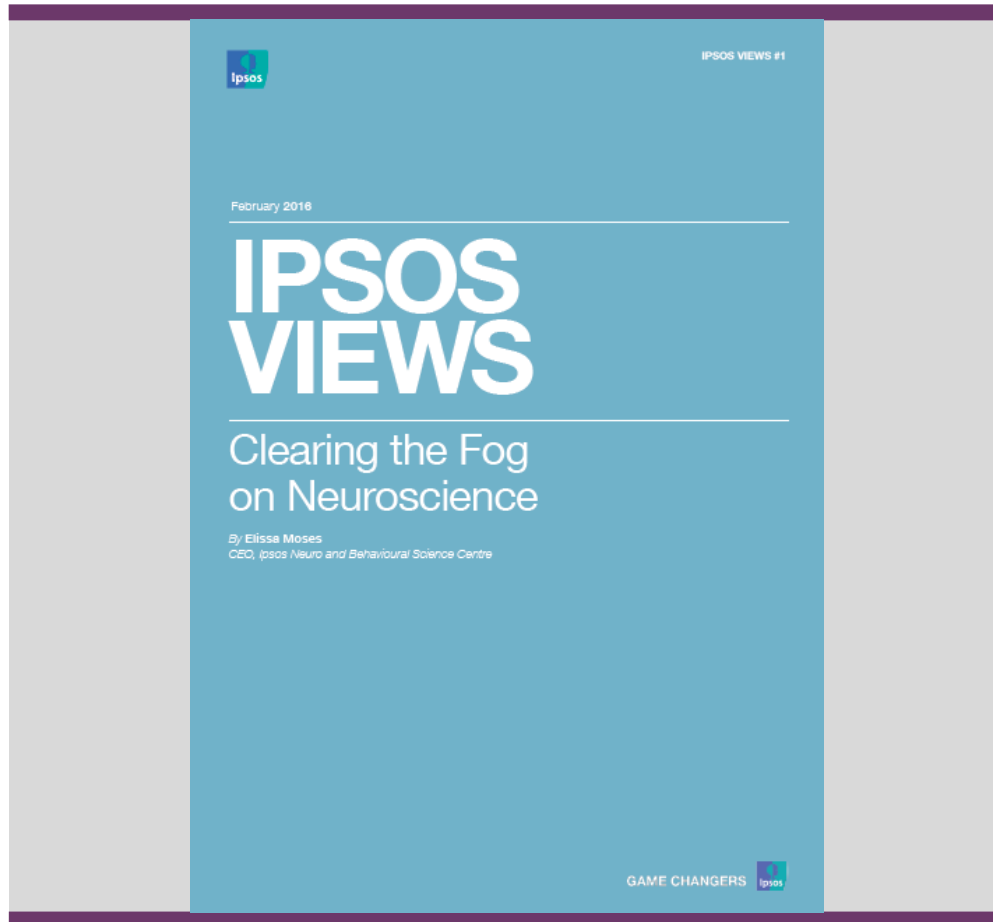


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CLEARING THE FOG ON NEUROSCIENCE



Applied neuroscience is one of the biggest research advancements of our lifetime and methods are now easier, more affordable and have added value for integrating into traditional research.

Clearing the Fog on Neuroscience addresses some of the misunderstandings around what neuroscience is and what it can and can't do.

The key themes include:

- The benefits of neuroscience
- How decisions are made from a neuroscience perspective
- What marketers need to understand
- The misconceptions surrounding applied neuroscience

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ECONOMY & BUSINESS



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SENIOR BUSINESS FIGURES OPTIMISTIC ABOUT BUSINESS PROSPECTS FOR 2016



These findings come from 'Captains of Industry', an annual survey of more than 100 of the most senior figures in top UK companies.

Key findings include:

- 57% of respondents predict business will improve in 2016. Only 7% think that things will get worse.
- Nearly all agree the government's policies will improve the British economy.
- Most (92%) agree that the UK is an attractive place to invest, but US seen as the best country for doing business.
- But three-quarters (76%) fear Chinese economy slowdown poses a threat to British economy.



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MORE THAN FOUR IN FIVE BUSINESS LEADERS HOPE FOR “REMAIN” VOTE IN EU REFERENDUM



The ‘Captains of Industry’ survey also showed 87% believe continuing EU membership would be best for their business.

Key findings include:

- 87% are personally hoping for a “remain” result in the forthcoming referendum and would themselves vote to stay in (83%) if there was a referendum tomorrow.
- Three in four fear Brexit would have a negative effect on the British economy.
- Free movement of people considered significant business advantage to UK businesses.
- Half (49%) would prefer Britain to return to being part of a purely economic union.



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ECONOMIC OPTIMISM AT ITS LOWEST LEVEL SINCE APRIL 2013



The Political Monitor shows economic optimism is continuing its decline since last summer, reaching its lowest level since April 2013.

Key findings include:

- A quarter of Britons (26%) believe the economic condition in Britain will improve over the next 12 months
- This compares to two in five (39%) who think it will get worse, and 31% who believe it will stay the same
- This gives an overall Economic Optimism Index score (% improve minus % get worse) of -13.

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POLITICS



"REMAIN" IN EU STILL AHEAD ALTHOUGH LEAD HAS NARROWED



As the clock ticks down towards the referendum on EU membership the latest Political Monitor reveals a majority still want to remain in the EU although the gap between stay and leave is narrowing.

- When asked the referendum question "should the United Kingdom remain a member of the European Union or leave the European Union?" 55% say they wish to remain (down 3 points from December) and 36% want to leave (up 4 points) giving a 19 point gap between remain and leave (a 3.5 point swing to leave)
- Our long-term trend question also shows the difference getting closer with exactly half (50%) the public now saying they would vote to remain an EU member and nearly two in five (38%) voting for Brexit – leaving a 12 point gap (a 2.5 swing).

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CONSERVATIVES TAKE THEIR BIGGEST LEAD OVER LABOUR



New research shows the Conservatives opening up their biggest lead over Labour as party with the best team of leaders and who are most clear and united on policies.

Key findings include:

- 43% of Britons say the Conservatives have the best team of leaders to deal with the country's problems, with 16% choosing Labour
- This is an increase of 9 points for the Conservatives and a fall of 7 points for Labour since June 2014, and is the biggest lead for the Conservatives since 1989
- When it comes to being clear and united about their policies, one in three (33%, up 6 since June 2014) believe this best reflects the Conservative party compared to 13% who say Labour (down 4, and just two points higher than UKIP on 11%)
- Public opposition to unilateral nuclear disarmament little changed since the 80s.



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MOST BRITONS THINK COUNTRY IS ON THE WRONG TRACK



In our global study of 24 countries we explore how people feel about the future for their country.

Key findings include:

- Only four in 10 people (38%) think things in their country are heading in the right direction.
- A majority (62%) say things in their country are off on the wrong track, with 59% of Britons agreeing with this statement.
- However, Britons are the 9th most positive about their own country out of the 24 surveyed, behind developing economies such as China (where 89% say things are headed in the right direction) and India (72%).
- We're also more likely to think things are on the right direction than citizens of many European neighbours including Germany (35%), Poland (30%) and Italy (20%).

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SURVEY OF MPS ON THE EUROPEAN UNION



UK MPs were surveyed on their attitudes to the European Union and the forthcoming EU referendum.

Key findings include:

- Half (50%) of MPs say they will vote for the UK to remain a member of the EU regardless of any re-negotiated terms of membership, while just over a third (35%) say it depends on the terms of the negotiations
- However, there are clear party differences; while almost nine in ten Labour MPs (87%) have already decided that they will vote for the UK to remain, just 11% of Conservative MPs have already decided to vote for the UK to remain
- Most Conservatives (61%) say they will decide how to vote after negotiations about the terms of membership, while a fifth (20%) say they will vote for the UK to leave regardless of the renegotiations.



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NORTHERNERS' VIEWS ON THE NORTHERN POWERHOUSE



A poll for the UK Northern Powerhouse International Conference and Exhibition has thrown fresh light on people in the North of England's views on the Northern Powerhouse project.

Key findings include:

- 82% of respondents stated that 'investing in training to develop skills of the local workforce' and 'transport infrastructure investment within the North' were the two most important priorities when compared with the other possibilities
- 7 in 10 respondents thought investment in transport links between London and the North is important, indicating that local people would prioritise investment between northern cities before further investment between the north and south
- Awareness of the Northern Powerhouse is about 50:50 (51% yes, 49% no) and there was a correlation between awareness and positivity.



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SOCIETY



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ECONOMIST/IPSOS MORI 2016 ISSUES INDEX



The January 2016 Issues Index shows that, after an absence of one month, concern about immigration has returned to the top of the list of the most important issues facing Britain.

Key findings include:

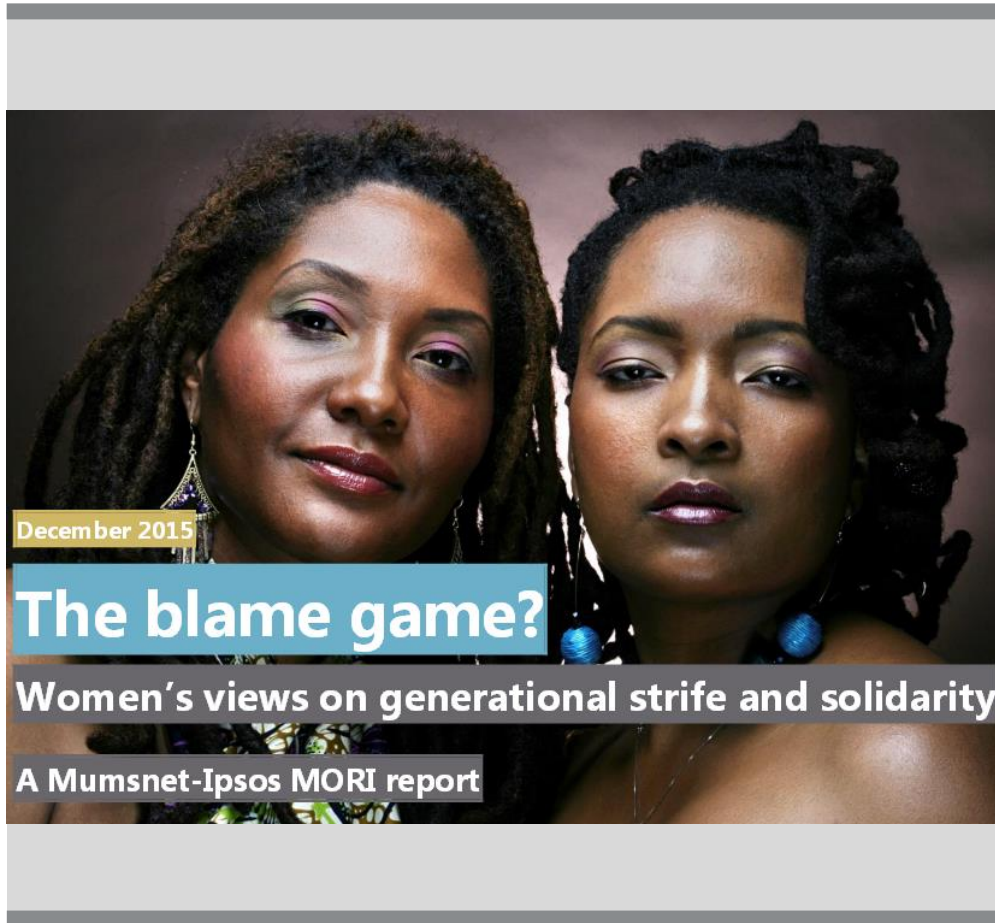
- Approaching half (46%) of the public mention this issue. This is an increase of six percentage points from last month, though concern peaked at 56% three months prior to that. For a quarter (25%) it is the single most important issue facing the country.
- 38% of the public mention the NHS, an increase of four percentage points since December, though, in the last decade, concern peaked at 47% in April 2015.

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THE BLAME GAME? WOMEN'S VIEWS ON GENERATIONAL STRIFE AND SOLIDARITY



New research for Mumsnet shows that Baby Boomers are seen as having the best quality of life

- While the media and the public identify Baby Boomers (50-69 year-olds) as the most fortunate generation, conversations with Generation Xers (36-49 year-olds) show that they also recognise their own good fortune.
- They have been enjoying many of the same benefits (free university education; a slice of property market profits) as their predecessors, but experiencing little of the resentment.
- Although they also feel hit by the pressures of the modern world, and are worrying about their children's futures.



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PREPARING FOR LATER LIFE; WORKING LONGER AND SAVING MORE



This research for the Joseph Rowntree Foundation explores people's attitudes and expectations about working longer and saving more for retirement and the barriers that prevent them from doing this.

Key findings include:

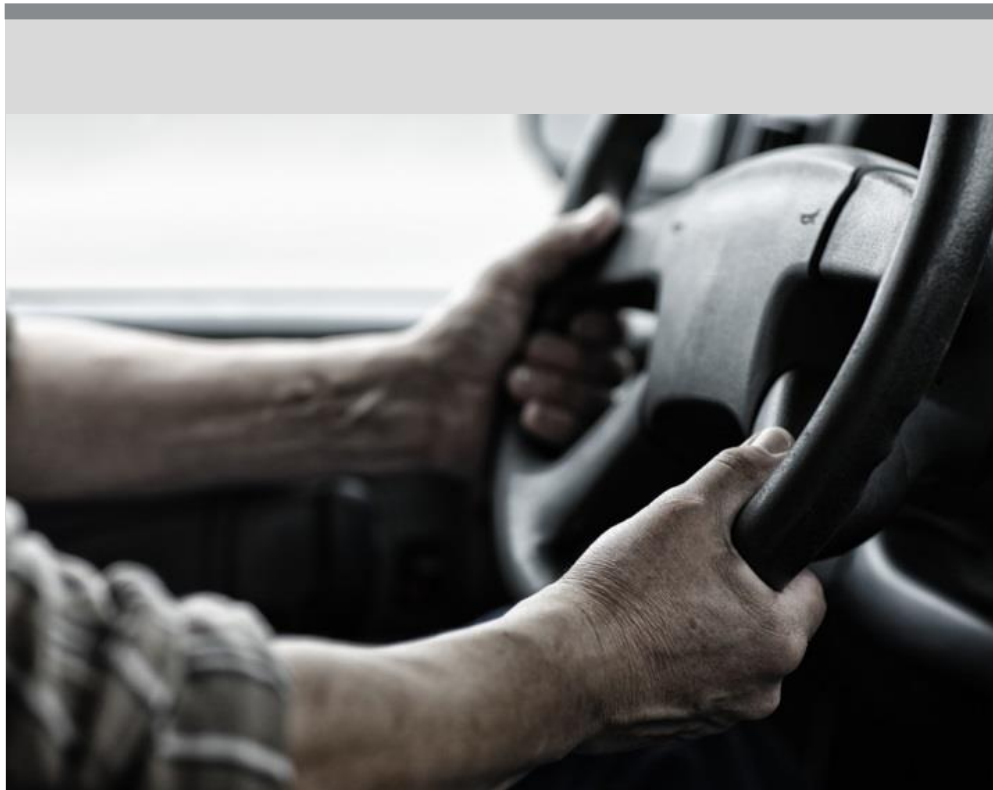
- The cost of living was cited by participants as a major barrier to saving for later life.
- Most participants accepted that they would need to work longer; indeed many felt that they would not have the necessary funds to retire.
- Ideas for increasing opportunities for flexible hours – and enshrining this in legislation – were welcomed by participants, as were measures designed to retrain or upskill older workers.

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CONNECTED DRIVING: PUBLIC APPETITE BUT CONCERN ABOUT SAFETY



According to research for the RAC Foundation, most drivers are interested in connected driving technologies.

- The majority of drivers are interested in connected driving technologies, but both they and the wider public recognise how connections to the outside world have the potential to cause distractions and impact on safe driving.
- Regarding the safety implications, the public are slightly more inclined to disagree than agree that “information provided about the car (e.g. fuel usage) could distract people from driving safely” (34% vs 30%), or that “information provided about the journey” could have this effect (39% vs 26%).
- There is rather clearer sentiment though when it comes to information provided from outside the car (e.g. text messages, phone calls), with a sizeable majority (69%) believing this has the potential to distract people from driving safely.



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POLITICIANS ARE STILL TRUSTED LESS THAN ESTATE AGENTS, JOURNALISTS AND BANKERS



Our Veracity Index shows that politicians remain the profession least trusted by the British public, below estate agents, journalists and bankers.

Key findings include:

- 21% of Britons trust politicians to tell the truth compared with 25% trusting journalists and estate agents and 42% who trust builders.
- Doctors remain the most trusted profession, with 89% of the public trusting them to tell the truth.
- Public trust in the clergy continues to fall; they are now the eighth-most trusted profession.
- Hairdressers are one of the most trusted professions in Britain, with 69% saying they would trust them to tell the truth.

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GLOBAL WARMING: UNITING WORLD OPINION



Following the 2015 United Nations Climate Change Conference, Global @dvisor looks at the opinions of citizens around the world towards climate change and global warming.

Key findings include:

- An overwhelming majority (84%) of citizens in 27 countries consider global warming a serious issue. Half (54%) consider it a very serious issue.
- Seven in ten (70%) believe there is solid evidence that the average temperature on earth has been rising. More see the evidence of temperature increase this year than in 2014 (62%), with the biggest gain of 13 points in North America (48% in 2014 vs. 61% in 2015).
- A large number (59%) disagree that it is practical and feasible to almost completely eliminate the use of oil and gas in the next ten years.



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HEALTH



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LATEST GP PATIENT SURVEY RESULTS RELEASED



The survey on behalf of NHS England details the headline findings of patients' experience of healthcare services provided by GP surgeries.

Key findings include:

- The majority (85%) of patients have had a good overall experience of their GP surgery with 43% stating they had a very good experience.
- The vast majority (95%) have confidence and trust their GP.
- 75% are satisfied with their practice's opening hours, however satisfaction has been falling.
- 85% were able to get an appointment last time they tried.



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HOUSING



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PEOPLE UNDERESTIMATE PAST HOUSE PRICE RISES



The latest Halifax Housing Market Confidence Tracker shows that on average, people under-estimate the extent of house price rises.

- In December last year the public thought, on average, that there had been a 1% rise in the average national house price between October 2014 and October 2015, compared to the reality of 10%.
- The survey also asked people about the average property price in 12 months' time in the area where they live. Just under six in ten, 58%, expect this to rise locally. This compares to 67% who expect a rise in the average UK property price over the next 12 months.
- Still, 14% expect a local property price rise of 10% or more, similar to the 13% who think this will happen nationally.

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Energy – the quest for a licence to operate

International research from Ipsos Global @dvisor and expert commentary from our Reputation Council members underline the growing challenge facing the worldwide energy industry, says Robert Knight.

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Three strikes and you're out of favour with the public

Anna Quigley and Harry Evans blog in the HSJ on why public sympathy with the junior doctors comes with some big caveats.

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Dead Trees and the Death Narrative

Andrew Green, Global Head of Audience Solutions, Ipsos Connect, blogs on the so-called 'death narrative' – the notion that printed newspapers (the 'dead tree' editions) will eventually disappear.

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Who is stepping up in the 'retirement revolution'?

New Ipsos MORI research suggests that big business is beginning to do its bit to help their employees make good decisions at retirement. Does this mean the retirement savings industry itself needs to do more, asks Georgina Clarke.

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The Truth, The Whole Truth and Nothing But the Truth

In a world where we can watch TV and read newspapers across a host of devices, Andrew Green, Global Director of Audience Solutions at Ipsos Connect, writes about how we can measure all this complexity.

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Five questions about the Holyrood elections

The result of the forthcoming Holyrood election may not cause a great shock but there is plenty to play for and the future of the country is at stake, says Mark Diffley in the New Statesman.

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All methodological details are available via the website links

