## Mood of the Nation 2023: Not angry, just disappointed

Presentation, November 2023







# We put the people who matter to you at the heart of your thinking

Thinks Insight & Strategy is an international insight consultancy.

We are a Certified B Corp – **a business that balances purpose with profit.** This informs how we run our business, how we treat our 70 colleagues, and the challenges we take on.









## We have four areas of expertise

#### STRATEGIC INSIGHT

Research & analysis that unlocks new thinking and better decision making

#### **BEHAVIOURAL**

Applied behavioural science to identify, explain & influence the behaviours that matter

#### **COMMUNICATION**

Campaign
development that
starts from where
your audience are
(not where you wish
they were)

#### **ENGAGEMENT**

Open conversations that generate new ideas & build understanding



## We advise a truly diverse client list











































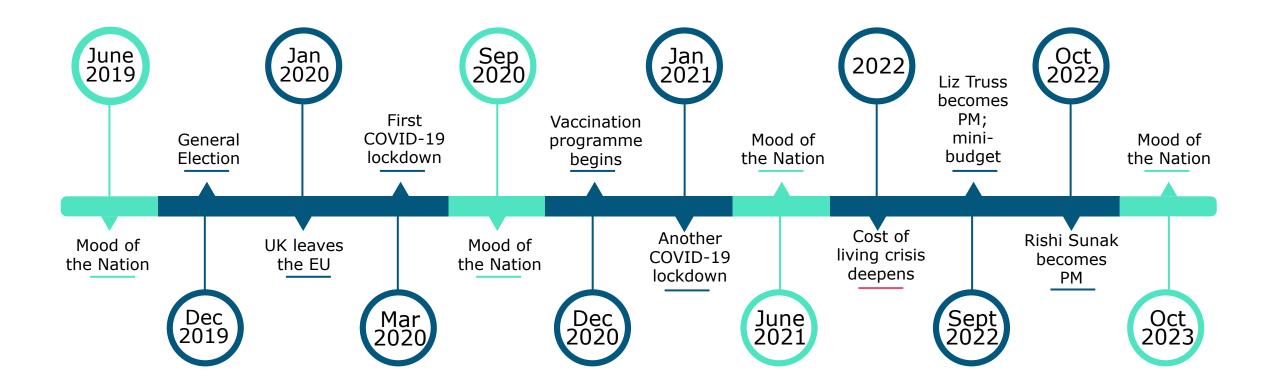








## We have been tracking the mood of the nation since 2019



## This year we conducted a survey and focus groups with members of the public





4 online focus groups with undecided voters in Stoke on Trent and Guildford

25<sup>th</sup> September 2023

Nationally representative survey of 2,100 adults in the UK

13th - 15th October 2023

## "Swing voters" (13%):

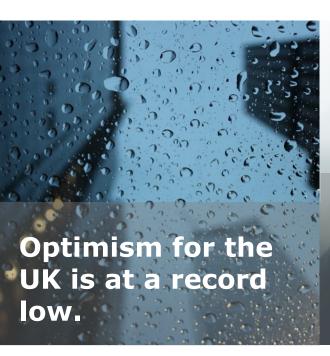
- All likely to vote
- Either 'Don't know' who they'll vote for (c.10%)
- Or choosing Labour or Conservative but say there's a good or fair chance they'll switch to the other (c.3%)



## **Key insights**



## **Key insights**



Almost every aspect of UK life feels close to crisis.



The public's priorities broadly reflect the Government's.

Whilst few hold out much hope, the ask of the next Government is clear:

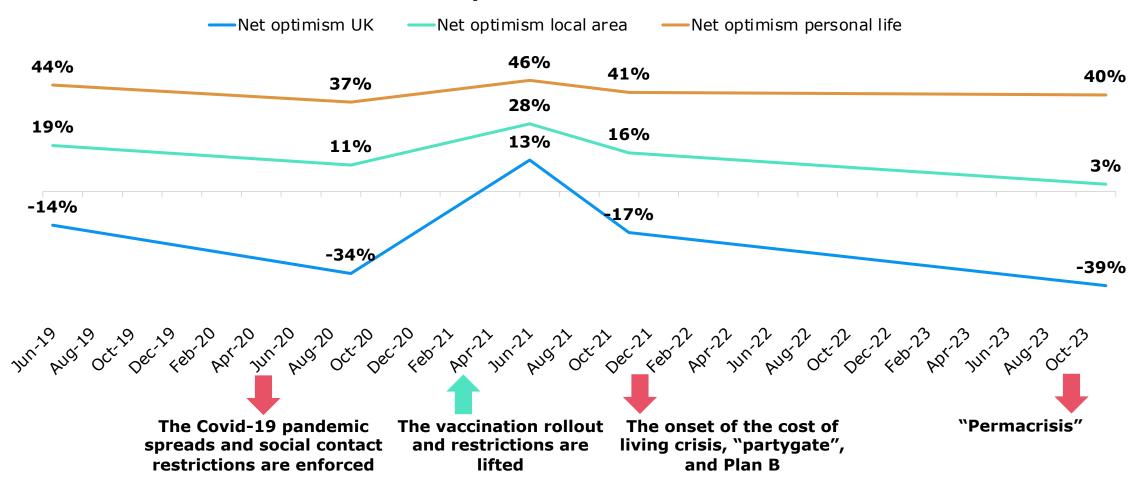
- Honesty.
- Competence.
- A plan.



Optimism for the UK is at a record low.

## Optimism for the UK is lower now than in the depths of the COVID-19 pandemic

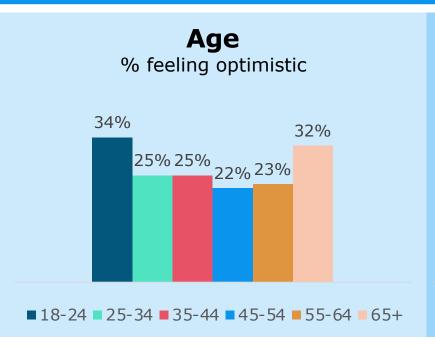
#### **NET optimism\* over time**

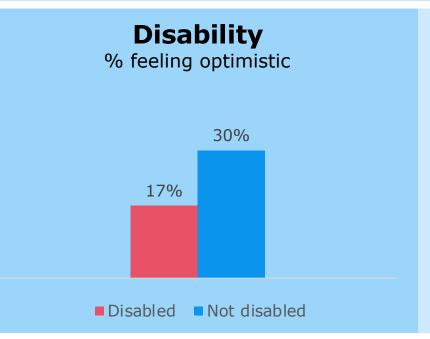


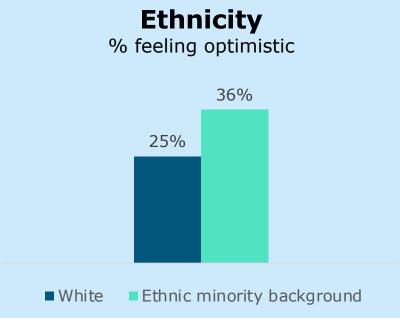


## Some groups are less gloomy about the country than others

### 27% of the public feel optimistic about the UK as a whole.







## The public are more optimistic about their local area and personal lives

46% of the public feel optimistic about their local area...

#### Words to describe local area

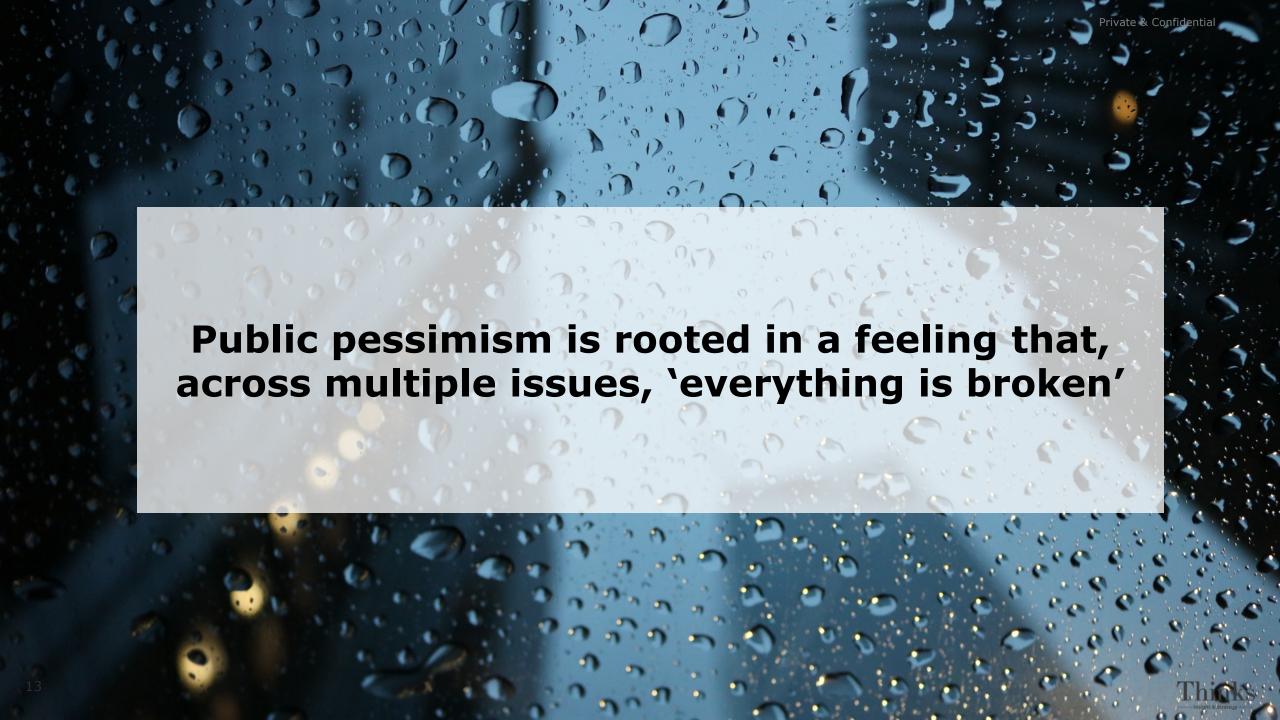


#### Words to describe personal life



...and 66% feel optimistic about their personal life

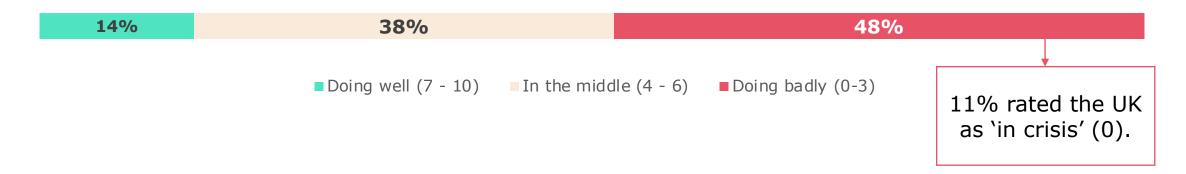




## Half the public think the UK is doing badly and 1 in 10 say it's in crisis

#### How well or badly do you think the UK as a whole is doing at the moment?

Rate on a scale of 0 – 10, where 0 is 'in crisis', 10 is 'going brilliantly' and 5 is in the middle



"It seems like it's **one thing after another.** The Government are just running round putting one fire out after another and doing it badly."

18 - 35, Stoke on Trent

"With potholes, NHS, the debt of Covid, it feels like we're paying off the country's credit card rather than investing in the country's future."

Survey respondent

"We seem to be going back to the times of Oliver Twist, with the increase in living costs for basic necessities."

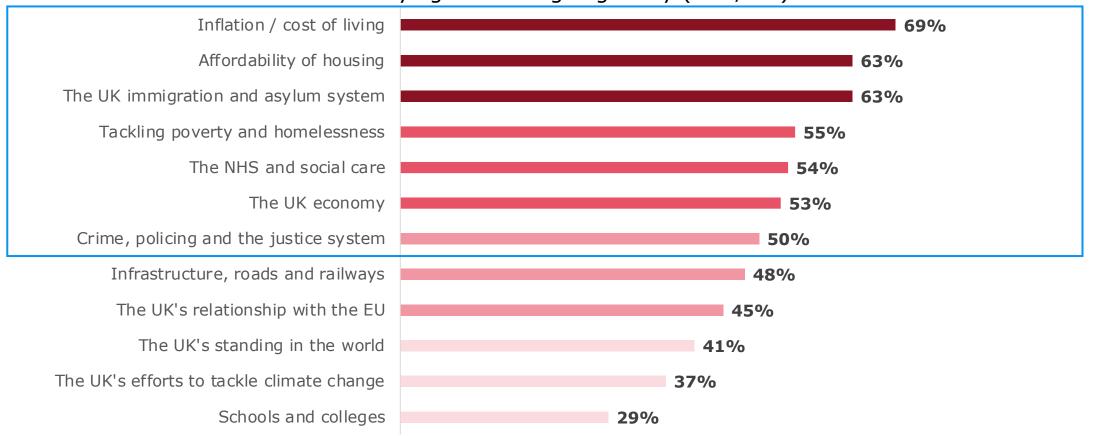
45+, Guildford



## Reflecting the overall picture, the majority feel most aspects of the UK tested are doing badly

#### How well or badly do you think the following are going at the moment?

% saying each are going badly (0-3 / 10)





## Across issues the public point to key symbols that indicate a country in decline

73% agree that 'the UK as a country has lost its way'



## Inflation / cost of living

"I'm in a fairly wellpaid job and I'm still **getting by on the skin of my teeth**. It shouldn't be like that."

18 - 35, Guildford

## Housing

"My daughter is getting married next month. She and her husband have to move in with me because they can't afford their own place. I don't mind it, but it's not how it should be."

45+, Stoke on Trent

## **Immigration**

"I don't know whether we're coming or going with immigration.
They tell us 1,000 people are coming in a day, but we don't hear anything else. Where are they put? Who is paying for it? [...] I don't understand it."

45+, Stoke on Trent

#### The NHS

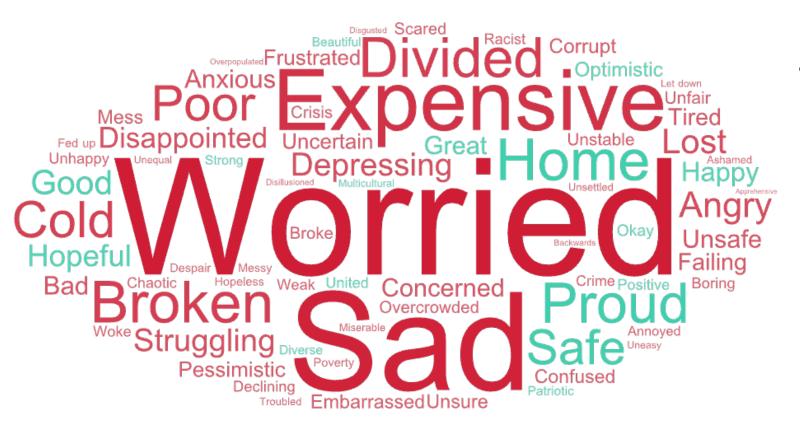
"After 12 hours of waiting I gave up and went home. It's just a terrible experience at the moment with long waiting times. These are long-standing issues that haven't been addressed."

45+, Guildford



## More so than angry, the public feel worried and sad

#### Describe how you feel about the UK:



"You want it to be so much better. The **infrastructure** is failing, around transport, around health, and so on. It just **baffles me now how** many people are living in food **poverty** and children experiencing difficulty: it used to be rare that I would refer a family to a foodbank, but now they're like mini supermarkets. But I don't know why it is proving to be so **challenging**, because Covid is no longer an excuse?"

45+, Stoke on Trent



## The public reject suggestions that the severity of the UK's situation is exaggerated

72%

'The UK is genuinely in a crisis right now'



22%
The media has

exaggerated how difficult things are'

63%

'I blame the Government more than global factors for the current state of affairs'



30%

'I blame global factors more than the Government for the current state of affairs'



## Most struggle to articulate a reason to feel hopeful that life will improve in the short term

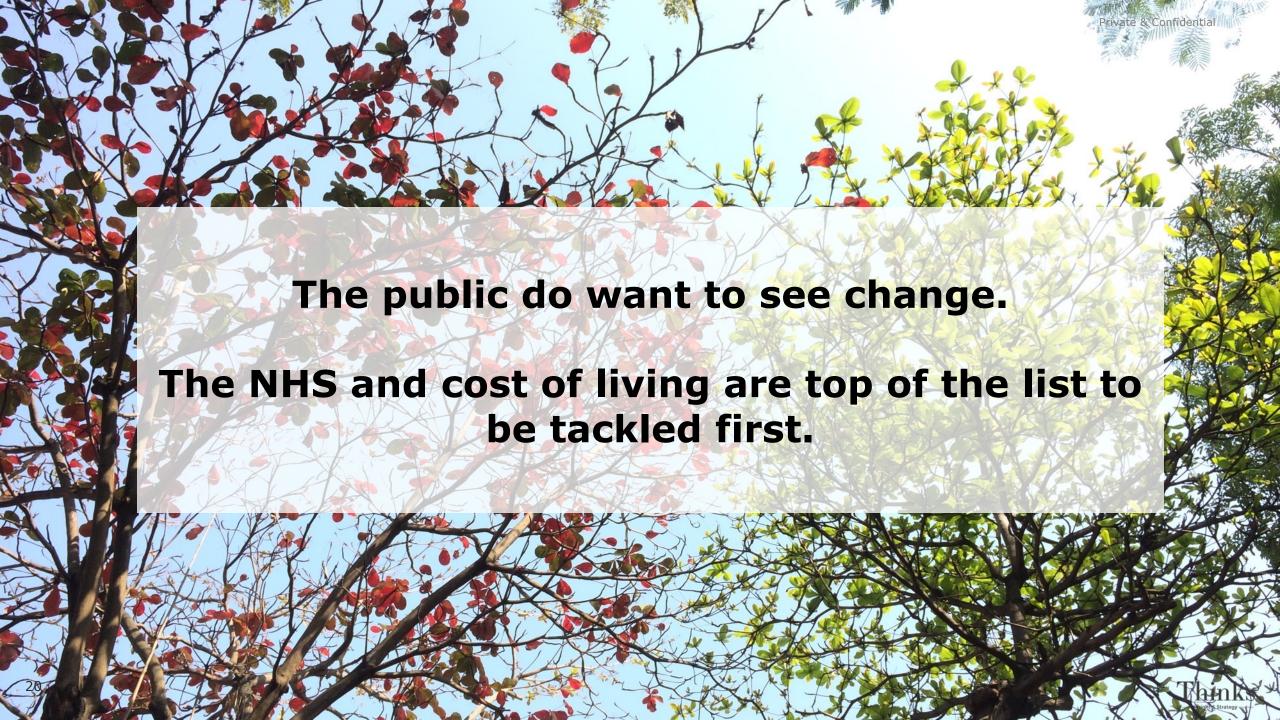
2 in 5 (43%) agree they expect their living standards to decline in the next 10 years.

"Hopefully it gets better but I'm not really sure how they're going to do it. I hope it stays the same, or if not gets better. But you never know what's going to happen or what's in the future."

18 – 35, Stoke on Trent

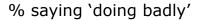
3 in 5 (62%) agree that it's difficult to find a reason to feel hopeful about the future of the UK in the next few years.

Over three quarters (77%) agree that the national morale of the UK is extremely low.



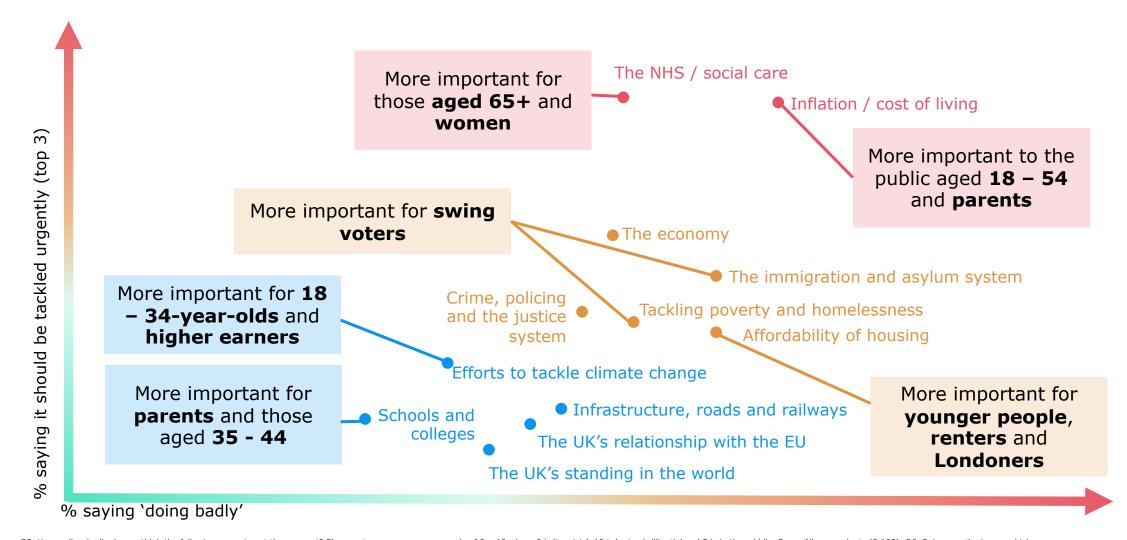
## The public's priorities broadly match the PM's five priorities for the country

Tier 1: The NHS / social care doing badly Inflation / cost of living & urgent to m tackle saying it should be tackled urgently (top Tier 2: The economy doing badly & The immigration and asylum system Crime, policing less urgent Tackling poverty and homelessness to tackle system Affordability of housing Efforts to tackle climate change Tier 3: doing better & Infrastructure, roads and railways Schools and colleges least urgent The UK's relationship with the EU to tackle The UK's standing in the world





## Certain issues are of greater importance for different groups of the public:





# We explored what symbols of hope and recovery would look like across priority areas



# The public look towards reductions in NHS waiting times and the cost of essentials to tackle the UK's two most pressing issues

#### What would improvement look like?

- Reducing waiting times for primary care
- Reducing elective care waiting lists
- An end to strikes

"Waiting lists reduced quickly and the strikes settled so our NHS feel valued and we can attract more qualified staff. Being able to get a doctors appointment without sitting on the phone for hours then being fobbed off."

Survey respondent

The NHS / social care

Inflation / cost of living

#### What would improvement look like?

- Food prices falling
- Fuel prices falling
- Mortgage and rent prices falling

"Food is so expensive these days. Fuel bills are through the roof, we're told to sit with blankets around us [...] It's like being in the 70s. The Government really need to solve this problem."

Survey respondent

% saying 'doing badly'



## Fewer small boat crossings and lower mortgage rates and rent are the signs of improvement

"A big reduction in the backlog for asylum decisions, stopping illegal asylum entry (people smuggling gangs) and better training for existing UK residents to work in those areas with labour shortages."

Survey respondent

"I would like to see more affordable homes being built for younger people and more bungalows for older people to downsize."

Survey respondent

#### What would improvement look like?

- Reduction in small boat crossings
- Reducing the backlog of asylum cases

- The immigration and asylum system
- Affordability of housing

#### What would improvement look like?

- Reductions in rent and mortgages
- More first time buyers
- Building houses (particularly social housing)

% saying 'doing badly'



# saying it should be tackled urgently (top 3)

# Potholes are totemic of local decline, while tackling issues with teacher recruitment and retention are key priorities for education

"More people wanting to go into teaching, better retention of current teachers, less burnout, safe buildings, better results, increased happiness of students, less behavioural issues and more funding for SEND."

Survey respondent

## What would improvement look like?

- Greater staff retention & ending strikes
- Increase to school funding (e.g. repairs)
- Greater SEND funding

Schools and colleges

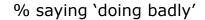
"Should we start with the basics - like potholes. A 'joined up' service being developed enabling towns, particularly in the north, to have ease of travel. And, the railway workers get back to work."

Survey respondent

## What would improvement look like?

- Fewer potholes
- Trains running on time
- Investments in regional transport

Infrastructure, roads and railways



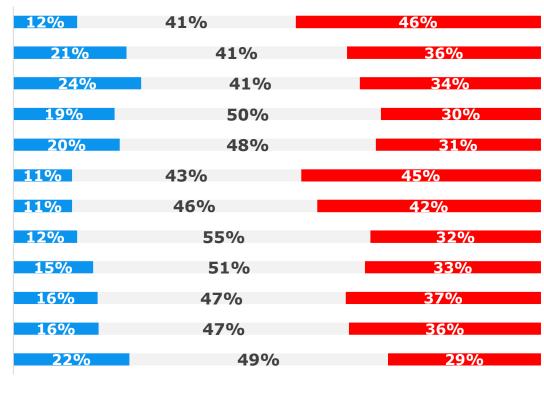


Whilst public priorities largely reflect the Government's, the public aren't confident in politics to improve life in the UK. The public want the next Government to be competent, honest and have a clear plan.

## Neither the Conservative nor the Labour Party are felt to have the answers

## Which of the two main parties do you think will do most to improve these issues?

The NHS and social care Inflation / cost of living The UK economy The UK immigration and asylum system Crime, policing and the justice system Tackling poverty and homelessness 111% Affordability of housing in the UK 11% The UK's efforts to tackle climate change Infrastructure, roads and railways in the UK Schools and colleges in the UK The UK's relationship with the EU The UK's standing in the world



Labour outperforms the Conservatives on expectations on every one of these issues.

But, for 10 of 12 issues, an even larger proportion of the public states 'neither' or that they 'don't know'.

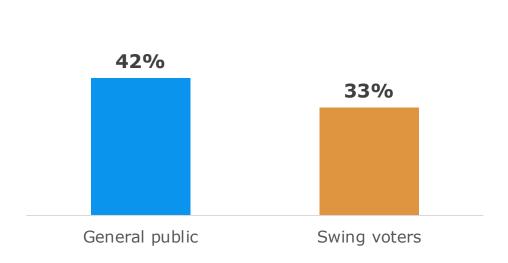
■ Conservatives more ■ Neither / Don't know ■ Labour more



## Swing voters feel that it's time for 'someone else to have a go'

However, swing voters are being pushed towards change rather than pulled.

"I feel excited by the prospect of a change in Government" Showing % agreeing



"At this point there needs to be a General Election. The people in power have been complacent and let this situation come about. Some change would be good at the top."

45+, Guildford



## The public are split on whether a change in Government will make a difference

45% 'a change in Government will not make any difference'



46% 'a different Government will change things for the better'

## More likely to be selected by:

- Those aged 55+ (56%)
- C2DE (48%)
- Swing voters (53%)

"I don't think it could get much worse. I hope it doesn't, so I'm going to be optimistic and say I hope it's going to get better. I even feel like if we have a new Government, whoever it may be, I don't particularly trust any of them at the minute."

18 – 35, Stoke-on-Trent

## More likely to be selected by:

- Those aged 18 34 (54%)
- ABC1 (49%)



## Reflecting this, there is tempered optimism for a Labour victory at the next election

How would you feel about each of the following outcomes of a General Election:

#### **Conservative victory:**



#### **Coalition victory:**



#### **Labour victory:**



## The public are divided on whether we need a break from the past... or just a break

44%

'what this country needs now is a period of stability and predictability'



50%

'radical change is needed to put the UK on the right path'

### More likely to be selected by:

- Those aged 65+ (52%)
- Swing voters (50%)

## More likely to be selected by:

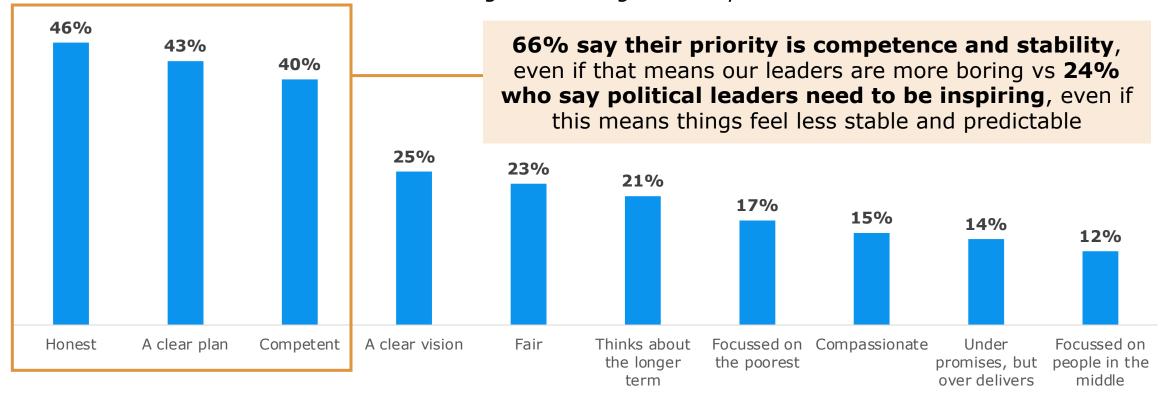
- Those aged 25 34 (59%)
- Those who feel pessimistic about the UK (58%)



## Across all demographics, the public want the next Government to be honest, competent and have a clear plan

#### Qualities the public would like to see in the next Government

Showing % selecting in the top 3





## **Key insights**



Almost every aspect of UK life feels close to crisis.



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Whilst few hold out much hope, the ask of the next Government is clear:

- Honesty.
- Competence.
- A plan.





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