

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)**

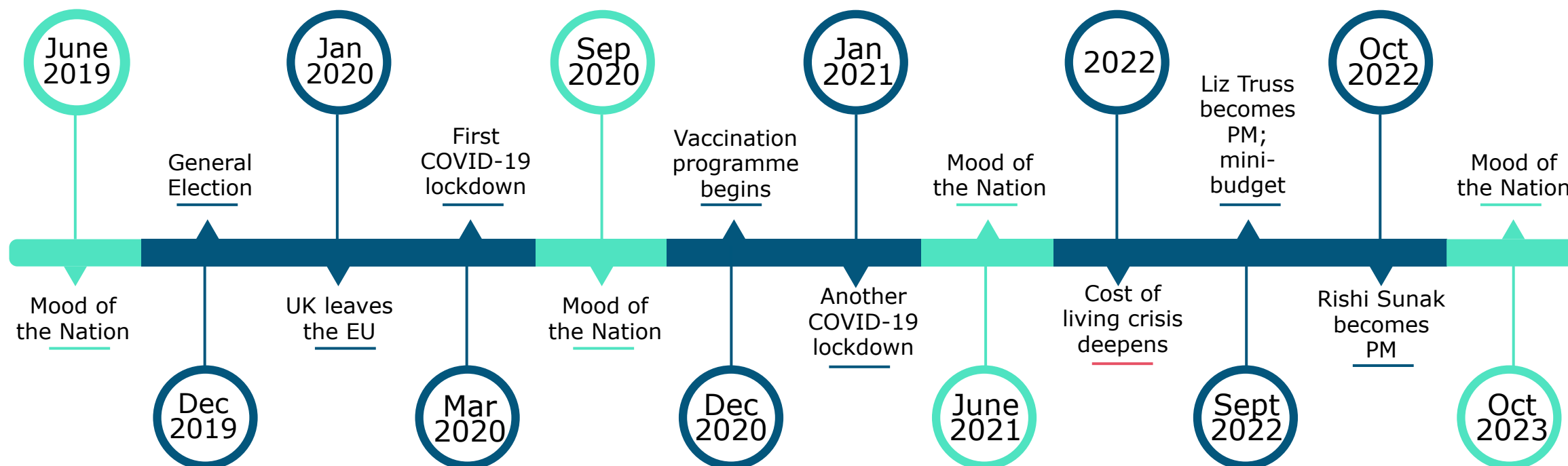
ENGAGEMENT

**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

25th September 2023



Nationally representative survey of 2,100 adults in the UK

13th – 15th October 2023

"Swing voters" (13%):

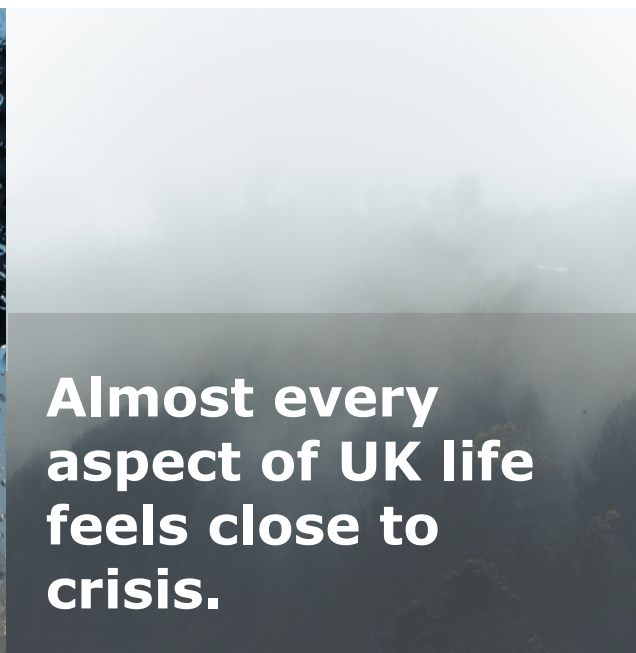
- All likely to vote
- Either 'Don't know' who they'll vote for (c.10%)
- Or choosing Labour or Conservative but say there's a good or fair chance they'll switch to the other (c.3%)

Key insights

Key insights



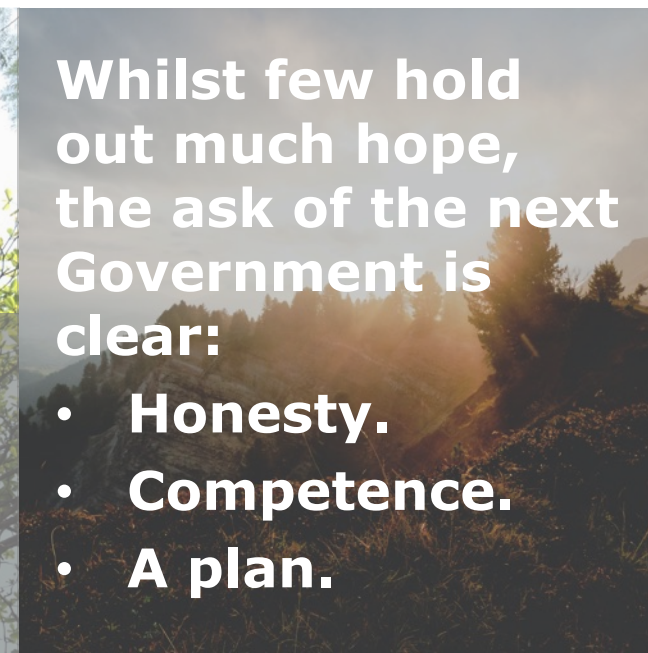
Optimism for the UK is at a record low.



Almost every aspect of UK life feels close to crisis.



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



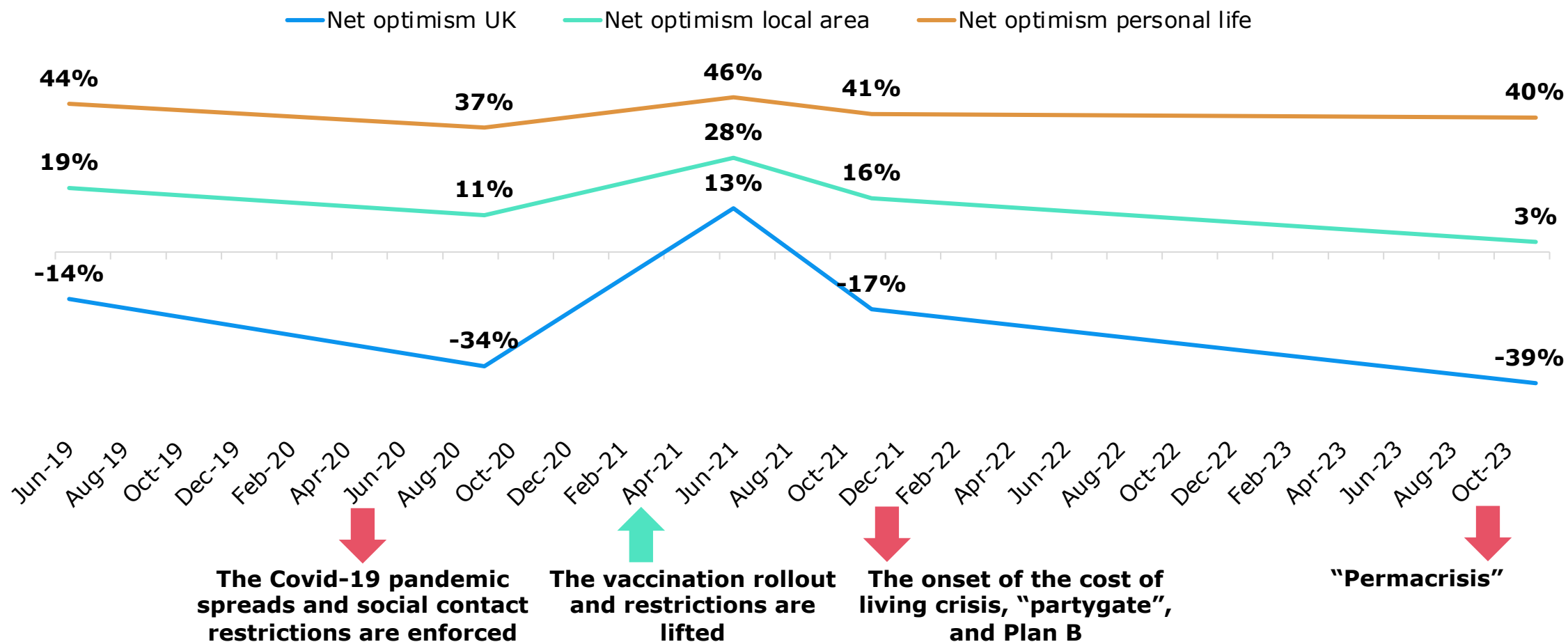
Whilst few hold out much hope, the ask of the next Government is clear:

- **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

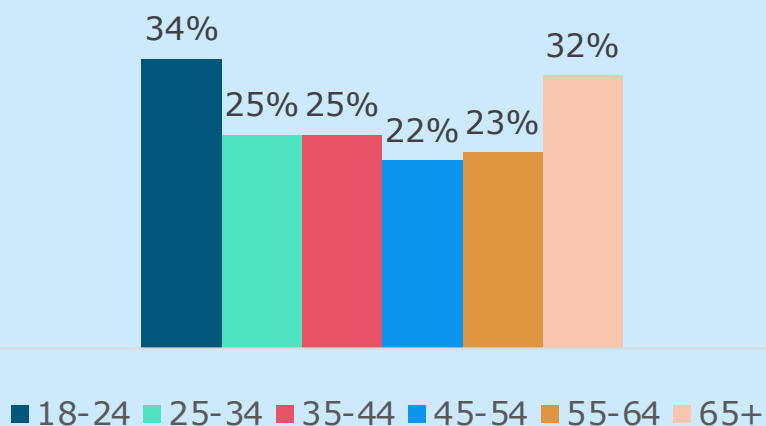


Some groups are less gloomy about the country than others

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

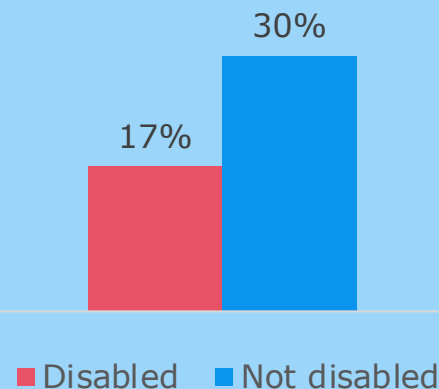
Age

% feeling optimistic



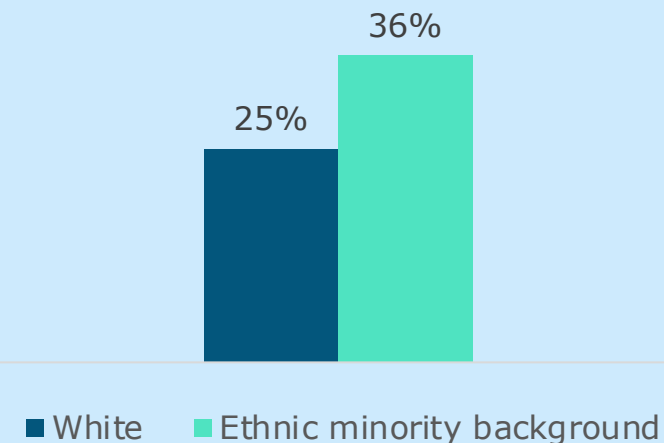
Disability

% feeling optimistic



Ethnicity

% feeling optimistic



Words to describe local area

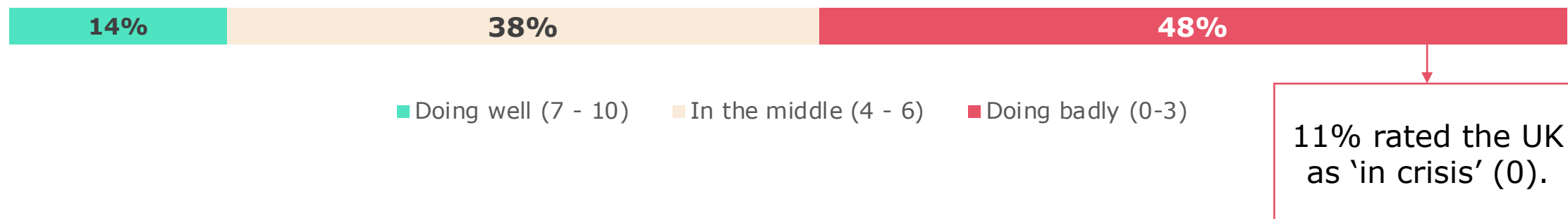


Public pessimism is rooted in a feeling that, across multiple issues, 'everything is broken'

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

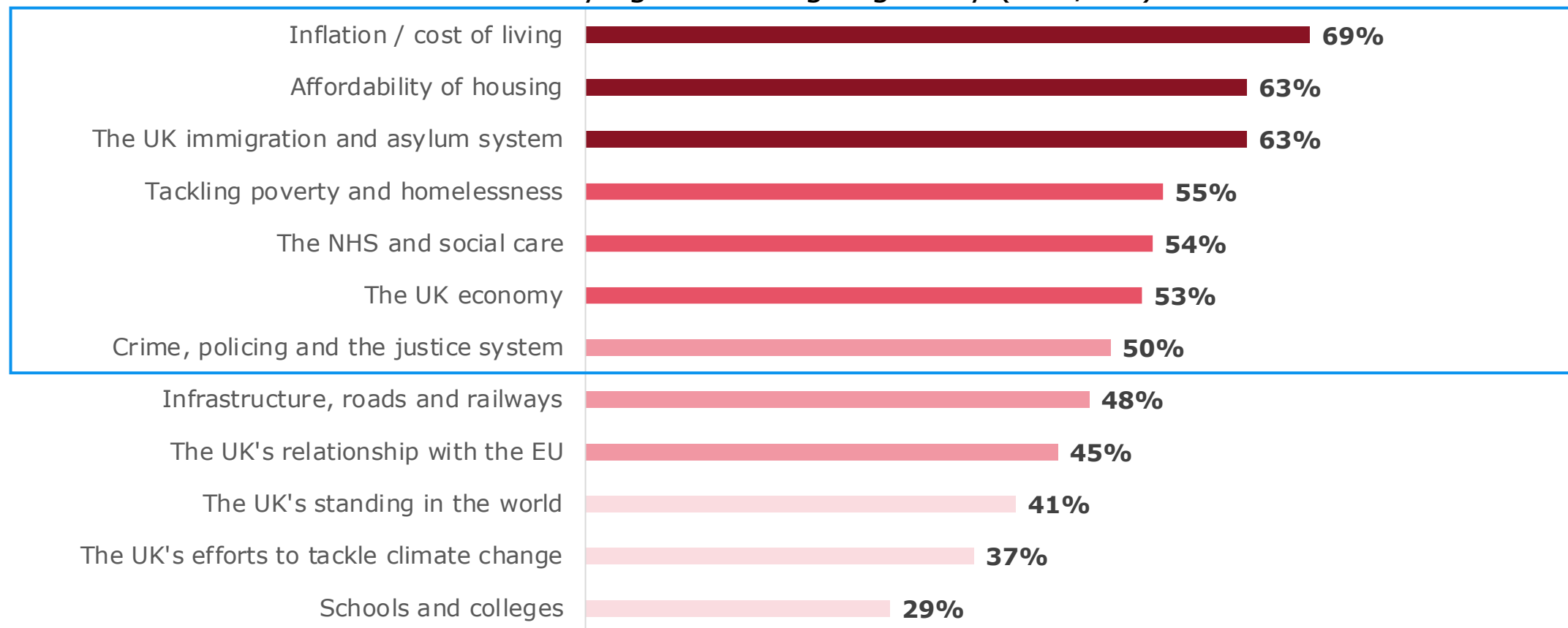
"We seem to be going **back to the times of Oliver Twist**, with the increase in living costs for basic necessities."

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 well-paid 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

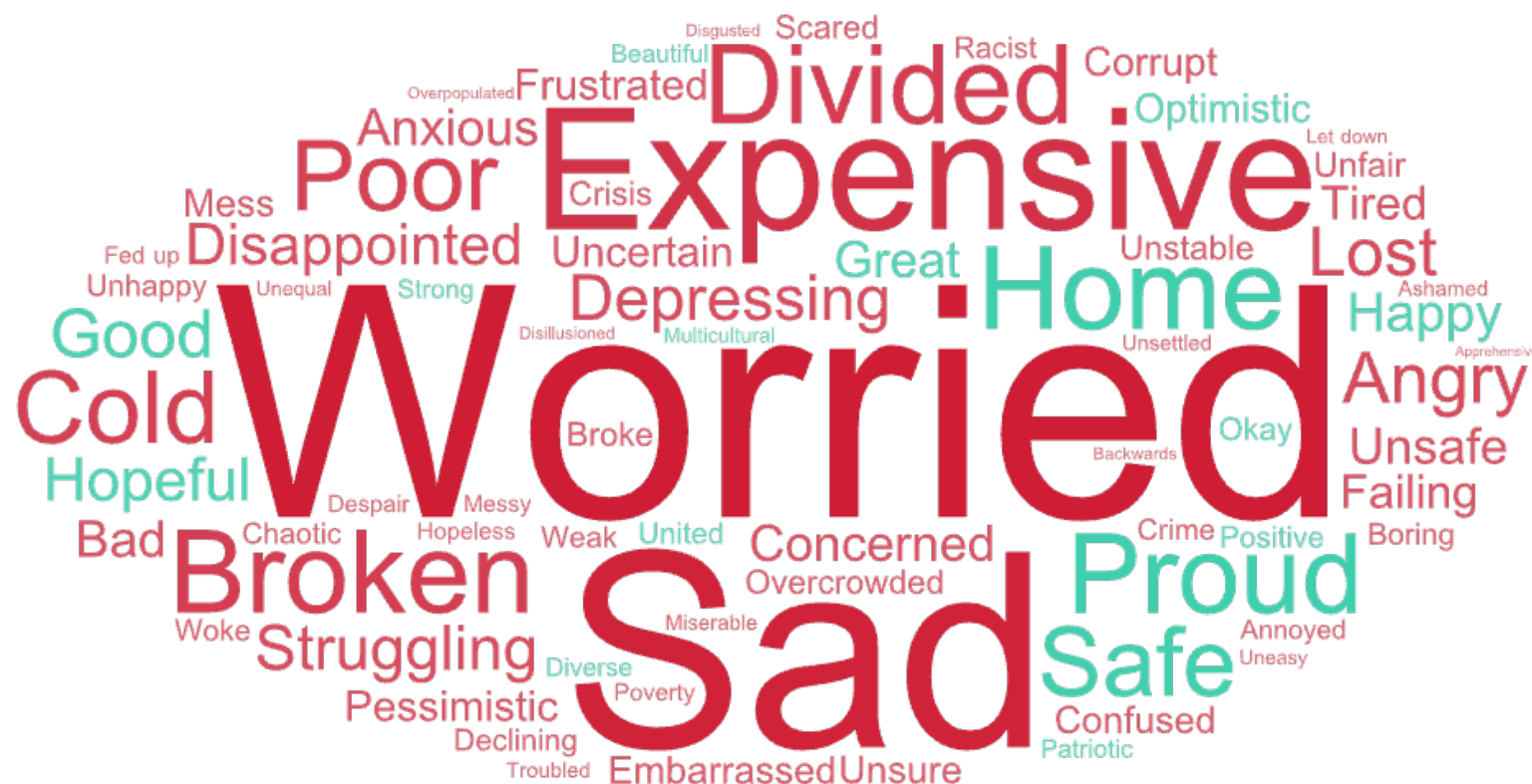
The NHS

"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.

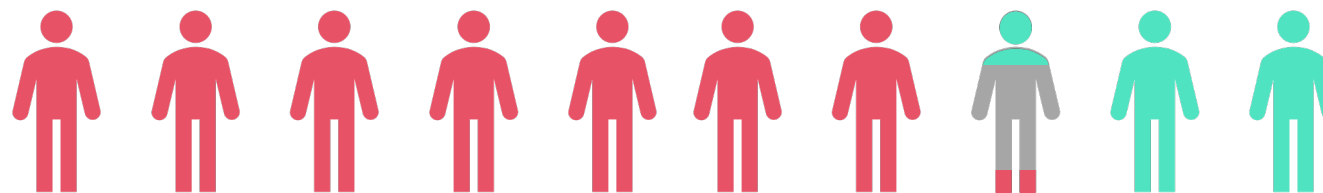
The **infrastructure is failing**, around transport, around health, and so on. It just **baffles me now how many people are living in food poverty** and children experiencing difficulty: it used to be rare that I would refer a family to a foodbank, but now they're like mini supermarkets. But **I don't 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'

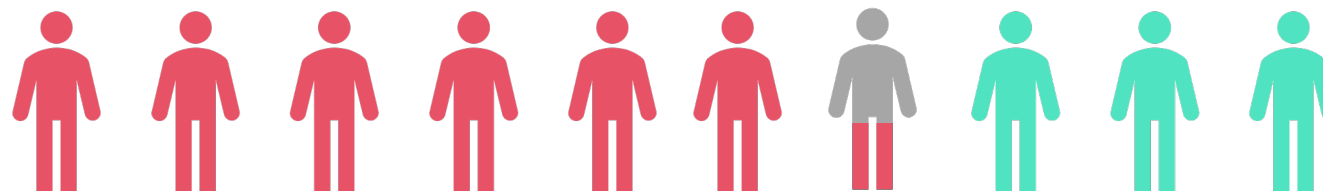


22%

'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

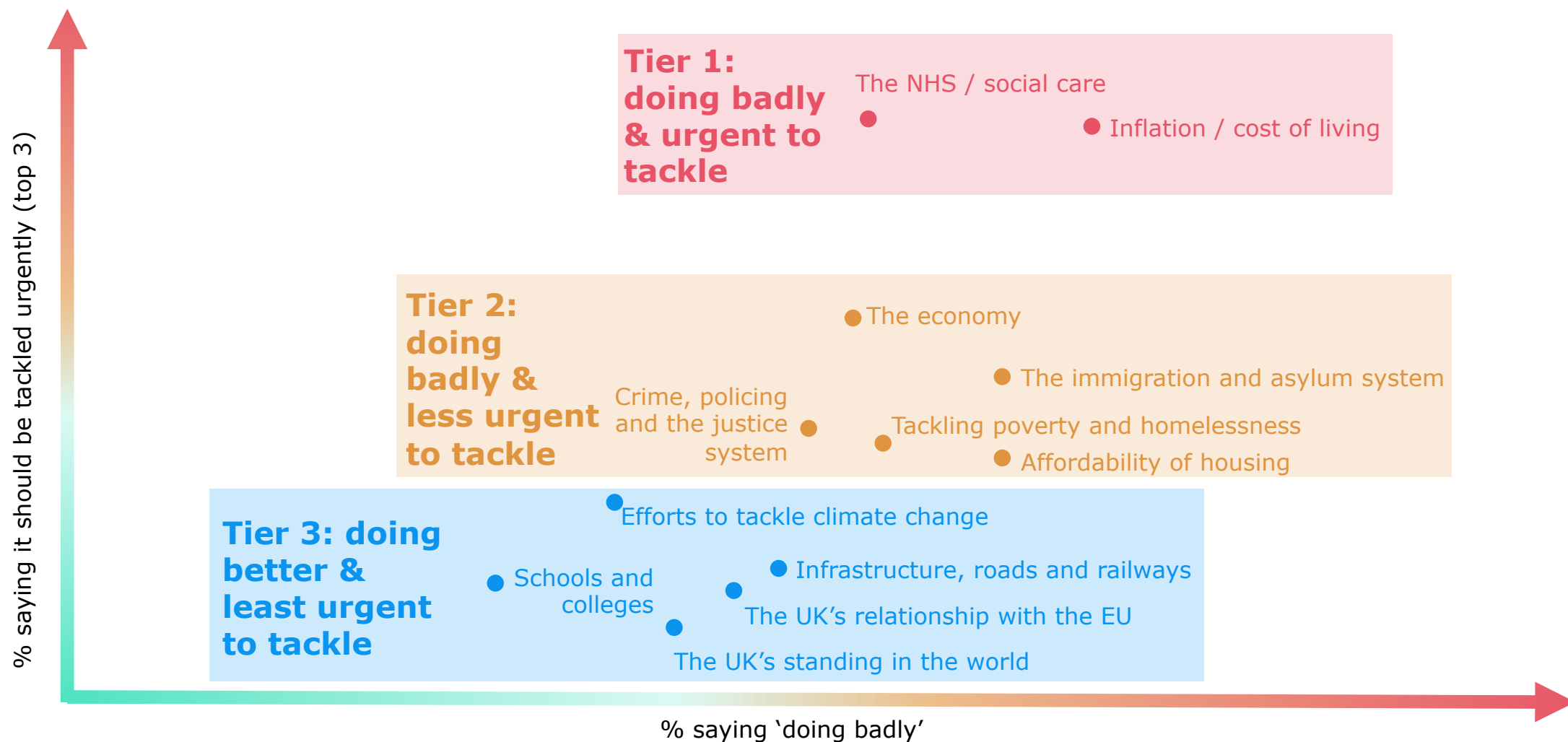
3 in 5 (62%) agree that it’s difficult to find a reason to feel hopeful about the future of the UK in the next few years.

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

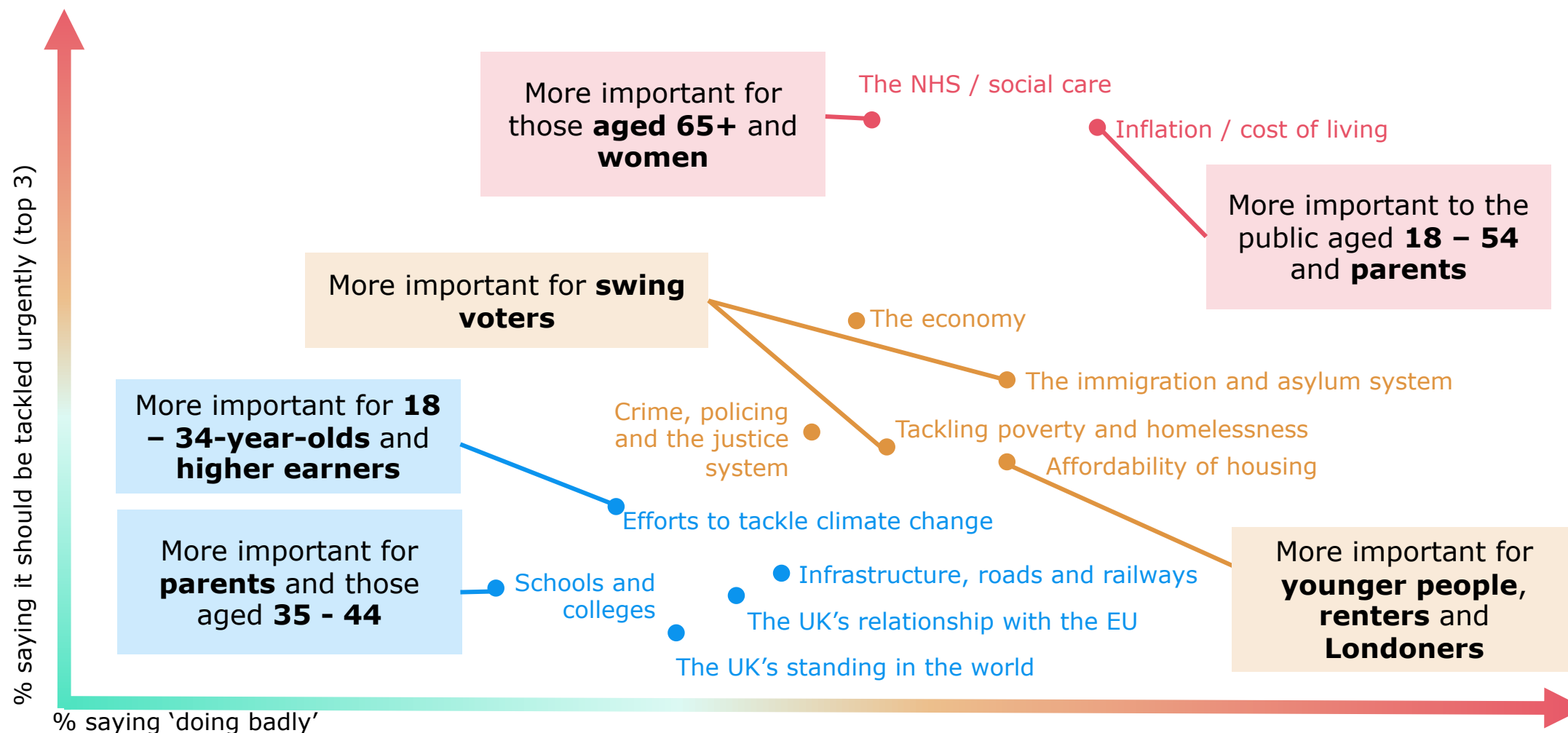
The public do want to see change.

The NHS and cost of living are top of the list to be tackled first.

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

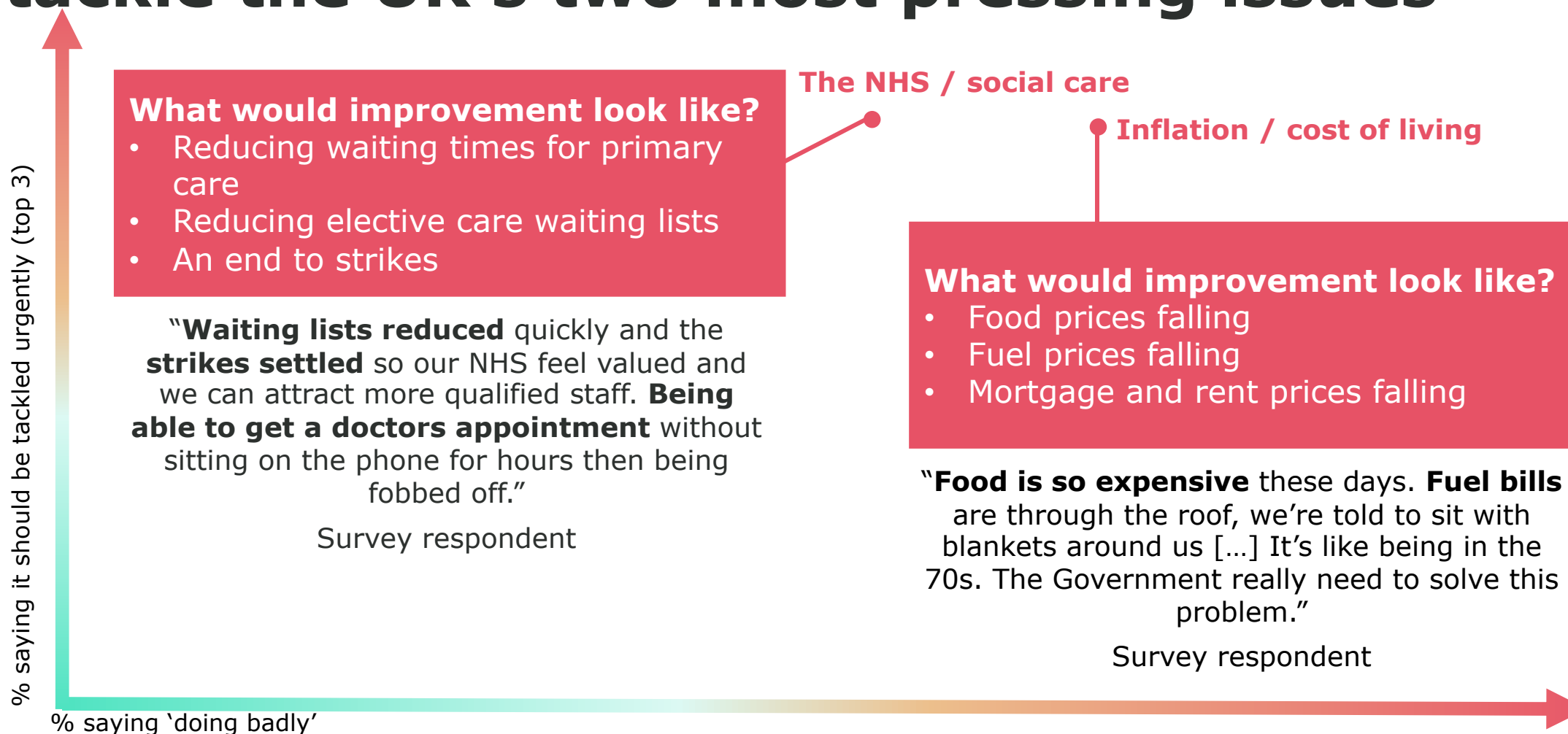


Certain issues are of greater importance for different groups of the public:

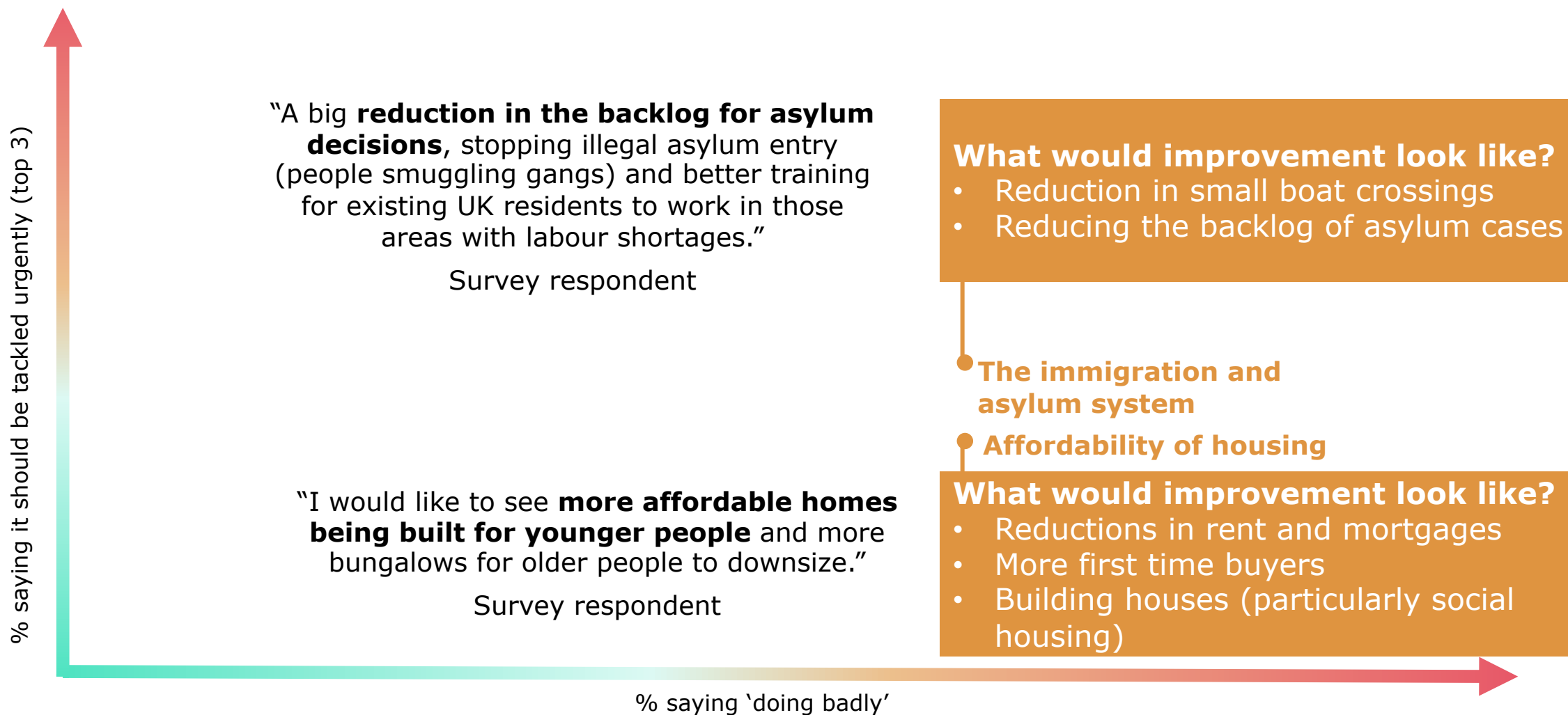


We explored what symbols of hope and recovery would look like across priority areas

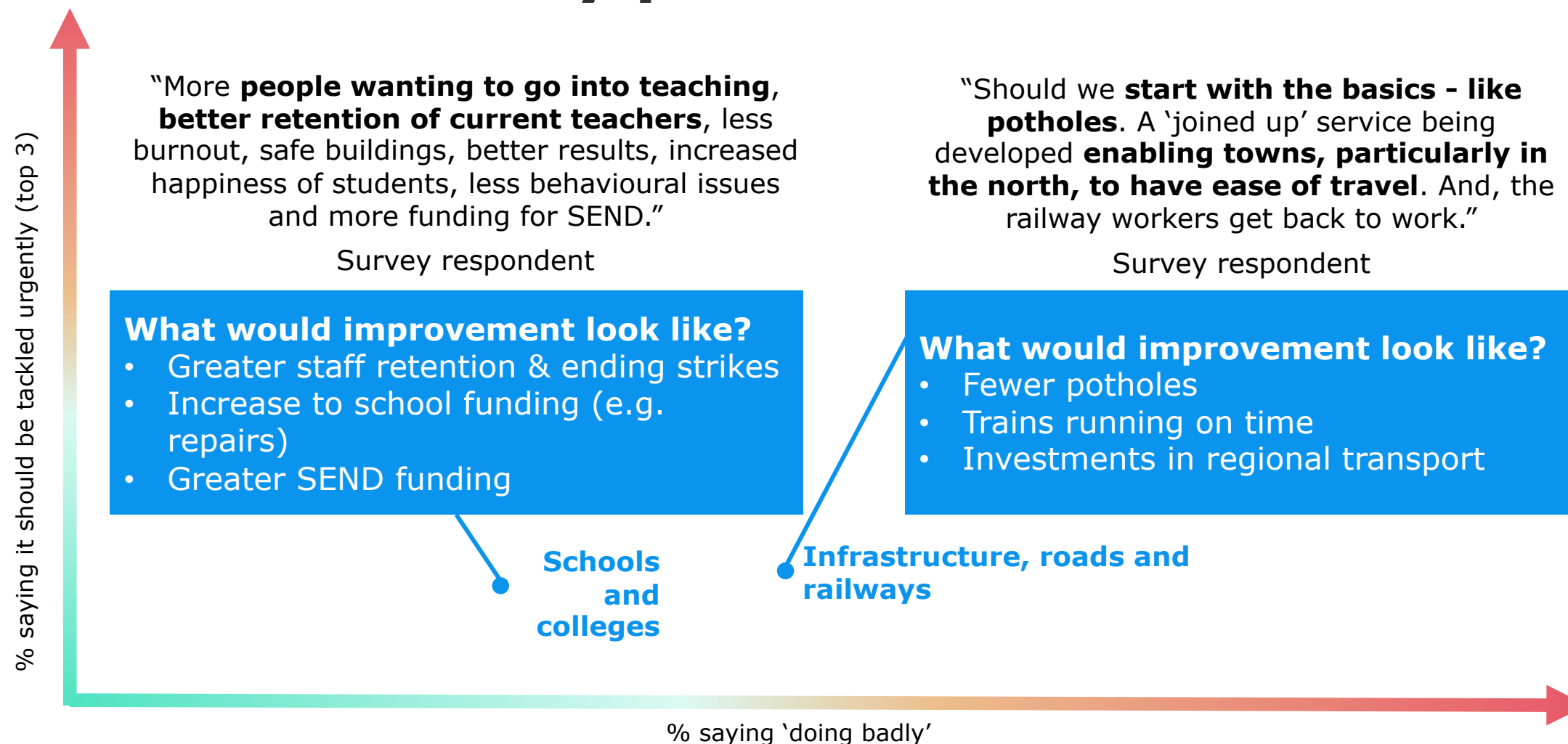
The public look towards reductions in NHS waiting times and the cost of essentials to tackle the UK's two most pressing issues



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



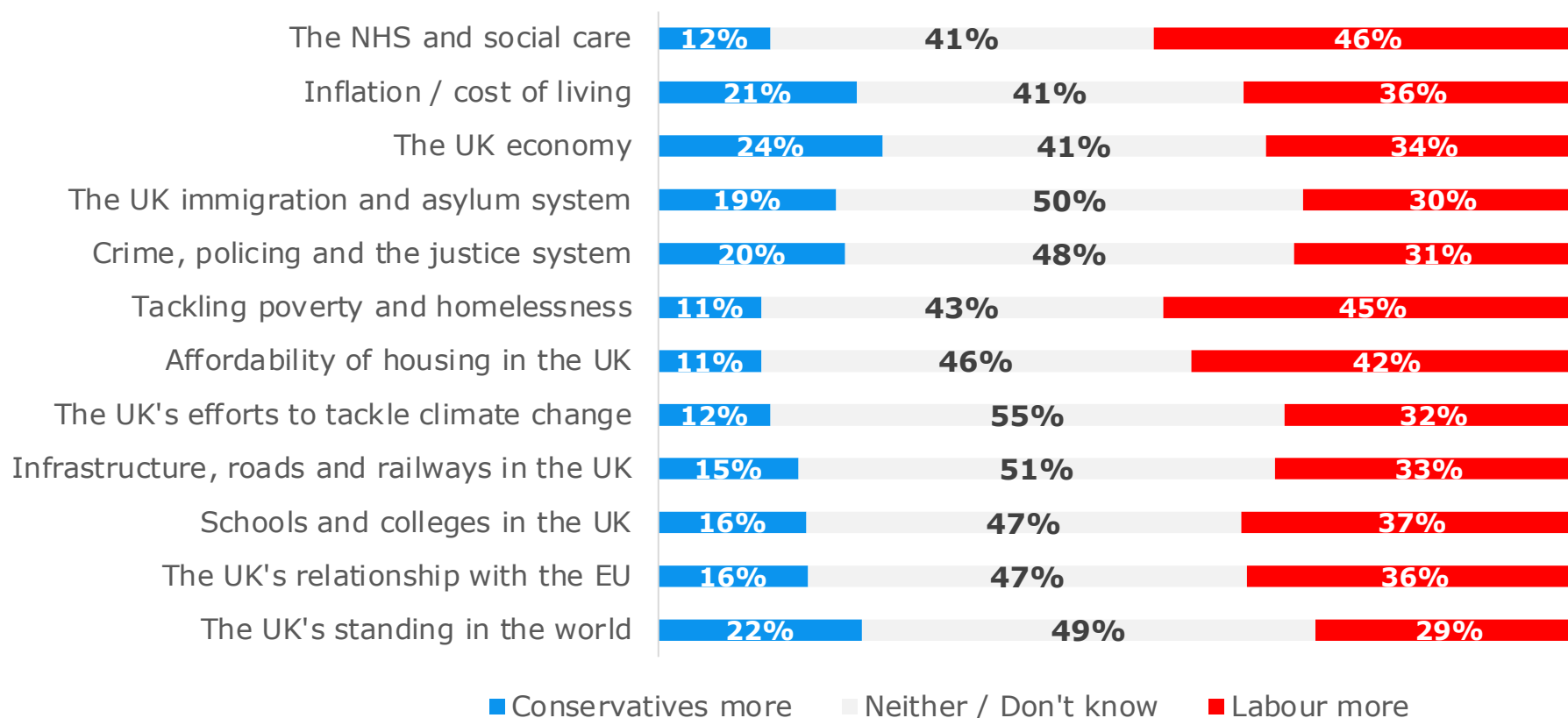
Potholes are totemic of local decline, while tackling issues with teacher recruitment and retention are key priorities for education



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?



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

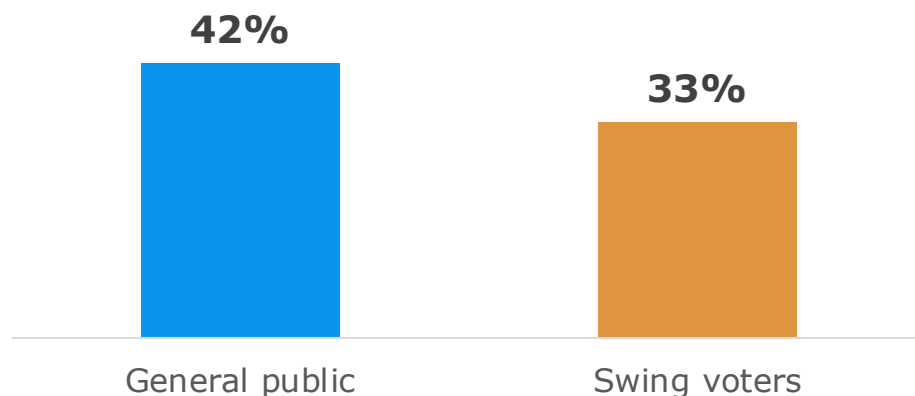
But, for 10 of 12 issues, **an even larger proportion of the public states 'neither' or that they 'don't know'.**

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



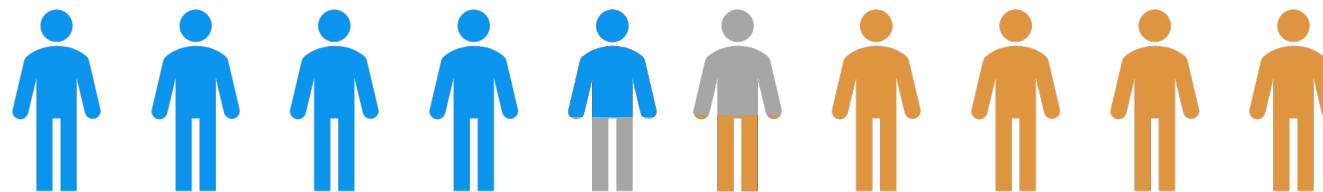
"At this point there needs to be a General Election. The people in power have been complacent and let this situation come about. **Some change would be good** at the top."

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:



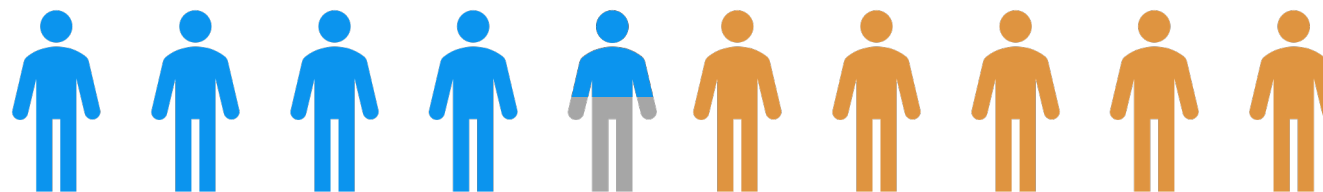
Labour victory:



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%)

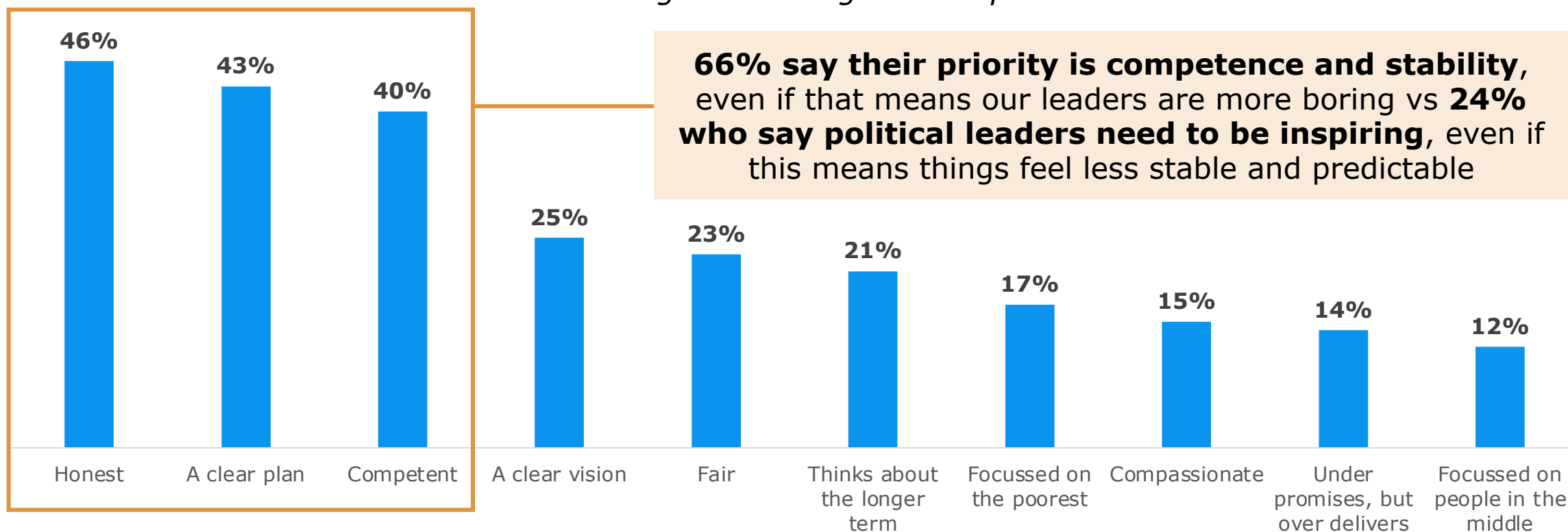
More likely to be selected by:

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

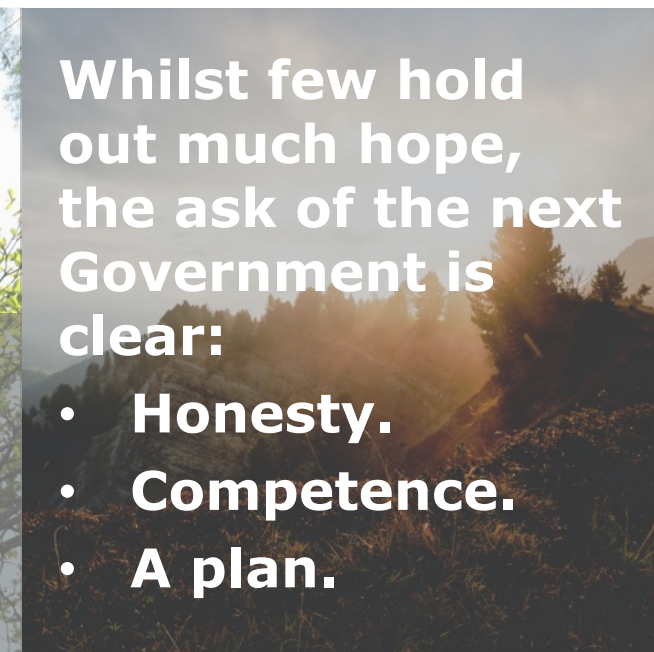
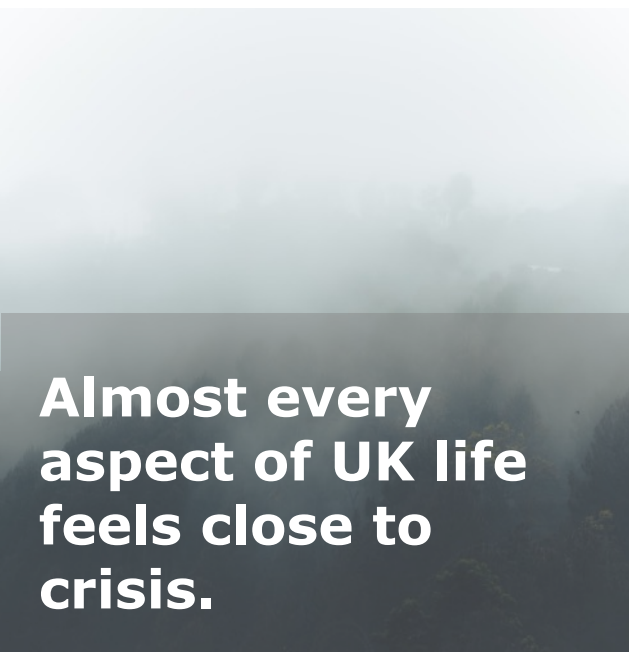
Across all demographics, the public want the next Government to be honest, competent and have a clear plan

Qualities the public would like to see in the next Government

Showing % selecting in the top 3



Key insights





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