

18th June 2019

BritainThinks

Mood of the Nation

Summary report

britainthinks.com

BritainThinks is an international insight and strategy consultancy.

We put the people who matter most to your organisation at the heart of your thinking.

Our expertise

Insight

Shed new light on the experiences, views, feelings and behaviours of your key audiences

Strategy

Insight-driven strategic counsel to guide your decisions

Communication

Pinpoint the messaging, tone of voice, words, images and spokespeople to deliver the greatest impact

Engagement

Bring your key audiences with you. Build stronger relationships with colleagues, stakeholders, clients and customers

Some of our clients



Mood of the Nation

A BritainThinks study

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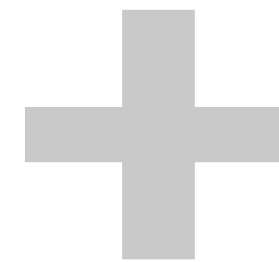
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Introduction

We set out to gauge the nation's mood: to understand how the public is feeling about the country, their local areas and their personal lives



We conducted four focus groups and a nationally-representative survey



4 focus groups in London and Leicester

28th and 30th May 2019

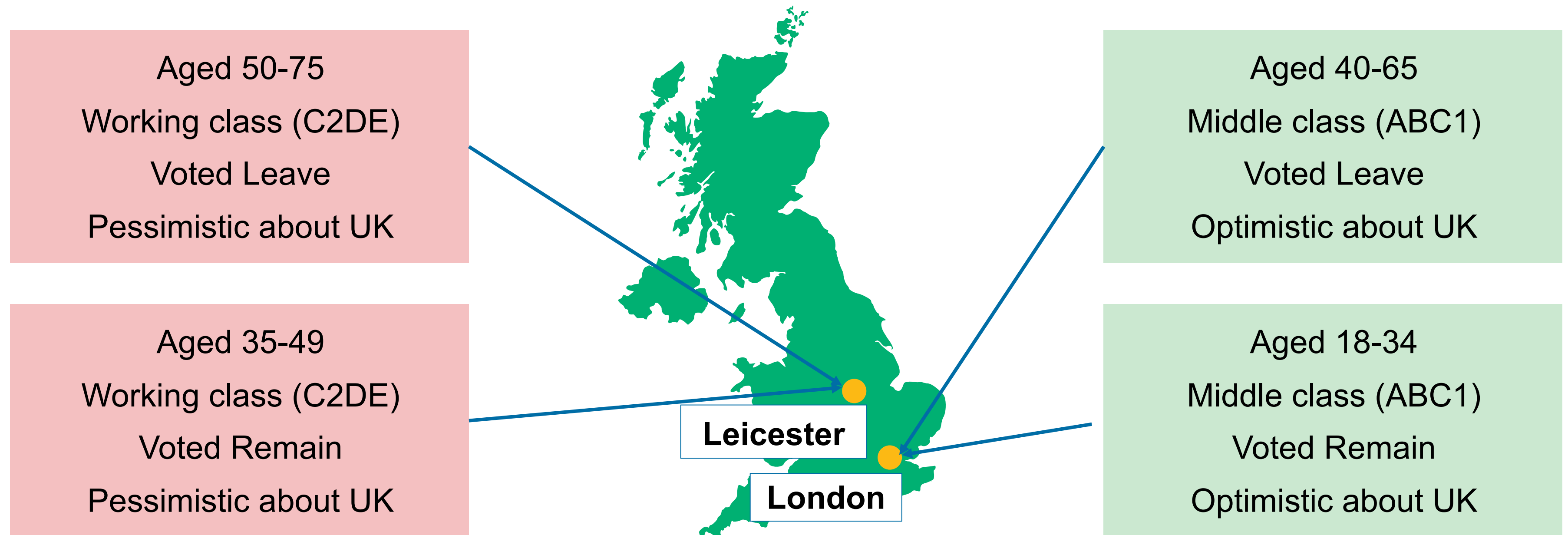
Groups split by optimism levels, age, SEG and voting history

Online survey

7th – 10th June 2019

Nationally representative sample of 2,017 GB adults aged 18+

Focus groups were split by level of optimism about the UK, voting behaviour, age and socioeconomic grade



Key findings

1

The national mood is bleak and gloomy: very negative and uncertain about the future of the country. There is marked 'pessimism inequality', with young people, less well-off people and Remain voters much more negative.

2

There is a strong sense of division within the country – culturally, politically and economically – which most people expect to worsen in the coming months.

3

Brexit remains the most prominent issue and is a key driver of both uncertainty and deep disillusionment with the entire political class, which is considered incompetent by a public craving strong leadership.

4

The UK is widely regarded as a nation in decline, assumed to be seen a laughing stock by the rest of the world while traditional British values are being eroded.

5

While people are more optimistic about their local area, they are concerned about housing, homelessness, decline of the high-street and, in particular, crime – which feels closer to home than ever.

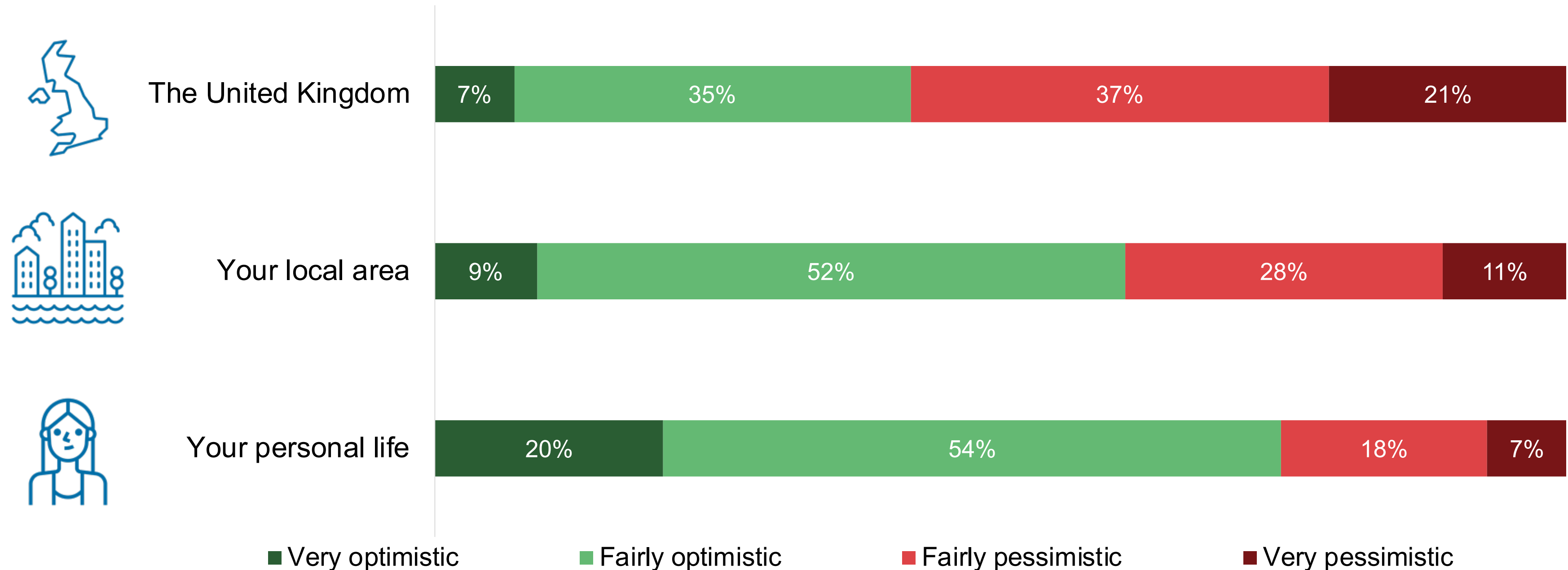
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By contrast, the public is generally upbeat and happy about their personal lives; most feel like they can 'switch off' from the wider issues and just 'get on with things'.

2

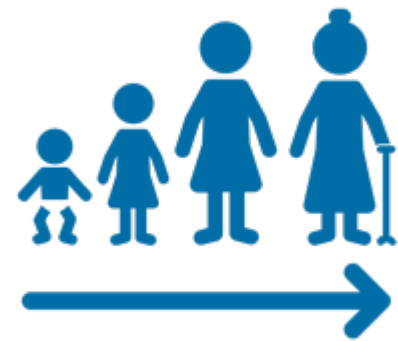
Overview of the national mood

There is considerable pessimism when thinking about the UK – but more optimism about local areas and personal lives



Q3. Thinking about the next year or so, how optimistic or pessimistic do you feel about each of the following? Base: All respondents excluding those who selected 'Don't Know / No Opinion' (n=1773 - 1806)

Feelings differ significantly depending on how old you are, how well off you are, where you live and how you vote



Age

56% of over-65s are optimistic about the UK in the next year or so v **29%** of 25-34s



Affluence

78% of ABs are optimistic about their personal lives in the next year or so v **64%** of DEs



Location

75% of rural residents are optimistic about their local area v **58%** of urban residents



Political preference

64% of Leave voters are optimistic about the UK in the next year or so v **22%** of Remainers

3

Feelings about the UK

When thinking about the country as a whole, there is considerable pessimism, apprehension and uncertainty

“When you travel around the country, I feel a very negative vibe from everyone you speak to. There is an atmosphere of negativity. Everyone is so negative. It’s a negative time.”

(50-70, Leicester, Leaver)



*“The UK is just uncertain.
Everything is a big massive
question mark over the UK.”
(35-49, Leicester, Remain)*

“The key word is uncertainty. The way forward, we seem to be stumbling along on a crooked path and not towards a target.”

(40-65, London, Leaver)

Q1. What three words would you use to describe how you currently feel about the UK? Base: All respondents (n=2,017). NB. Only 25 most common words shown.

The public is pessimistic on a wide range of national issues, by no means limited to Brexit



Brexit



Divisions in society



Ineffective politics



Economy



Poverty / inequality



Environment



NHS

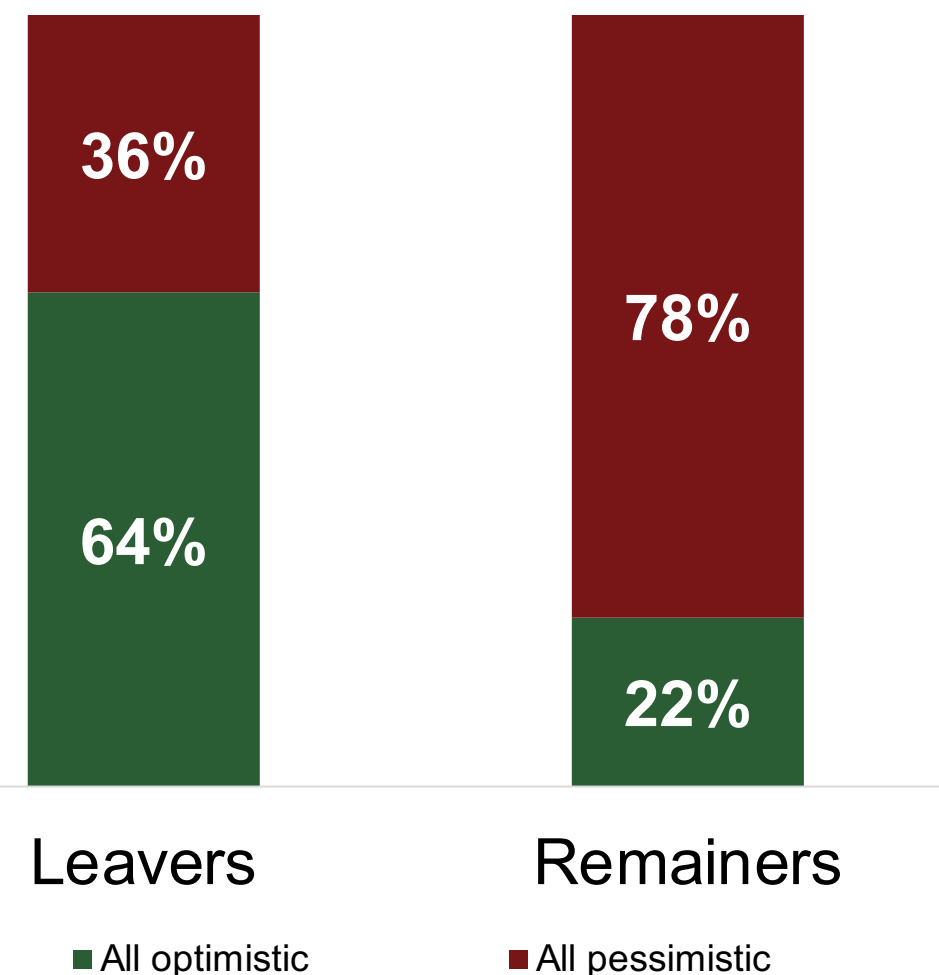


National decline



Brexit is a significant driver of pessimism for Remainers; while Leavers express some frustration, it is still a source of optimism

Optimism about the UK in the next 12 months



65%

of the public is
pessimistic about the
Brexit outcome
(including 50% of
Leavers)

"I think we're a sleeping giant. I think once Brexit happens, which I hope it does, there's going to be many more opportunities for us to trade, opportunities for us to set our own laws and rules away from the EU."
(50-70, Leicester, Leaver)

"I can't see Brexit getting solved. Doesn't matter who is trying to solve it. Europe has dictated what they want and it's not going to change."
(50-70, Leicester, Leaver)

Q3. Thinking about the next year or so, how optimistic or pessimistic do you feel about each of the following? Base: All respondents excluding those who selected 'Don't Know / No Opinion' (n=1773)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017)

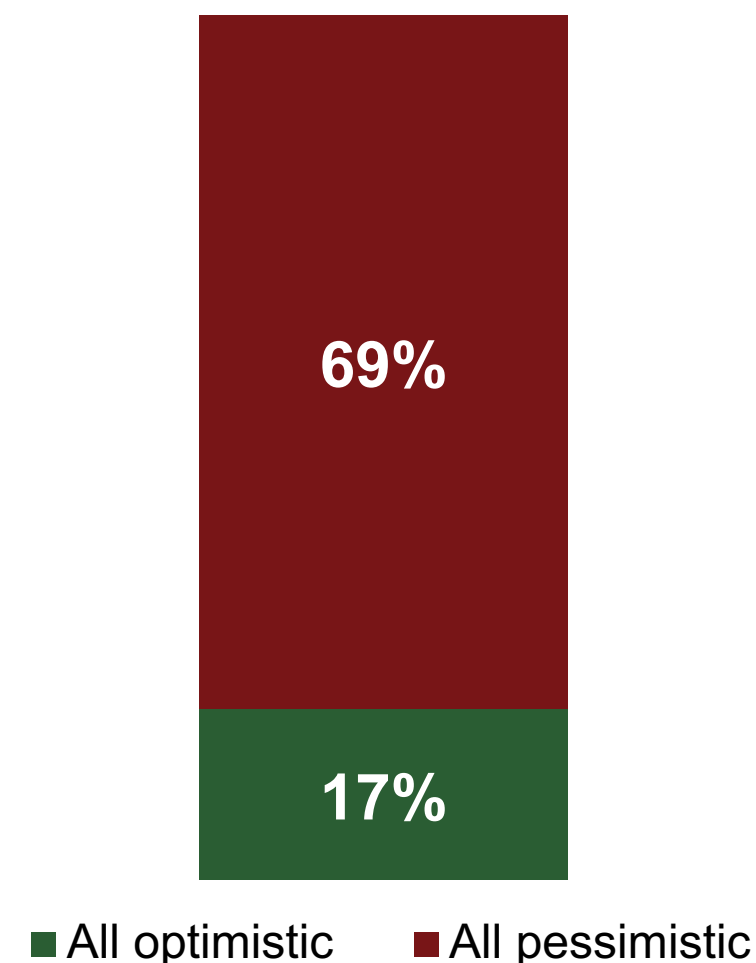


The UK is seen as a deeply divided country (culturally, politically and economically) – and most think these divisions are likely to deepen

“If you have a barbeque with people and you bring up politics, the whole thing shuts down! Everyone disagrees and argues.”
(35-49, Leicester, Remainer)

“I think we need stronger communities. I remember in the 80s, we would leave doors open and that stopped in my teens. Everyone is a lot more isolated, a lot more closed off. You have Polish shops and they’re not even integrating at all.”
(40-65, London, Leaver)

Optimism about national unity



72%

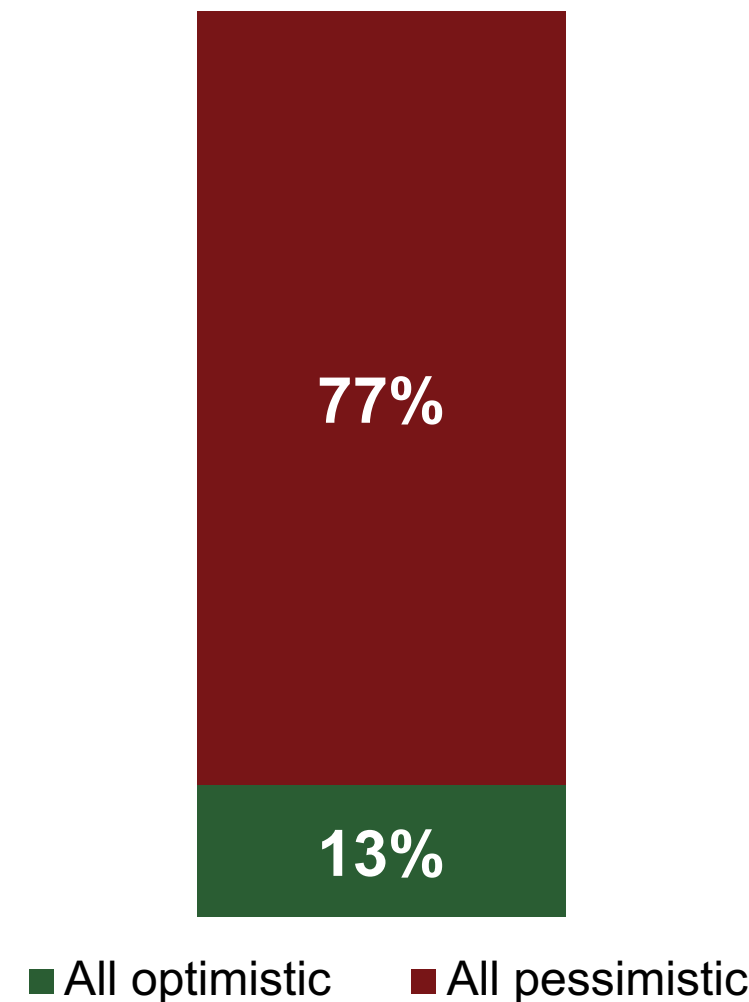
of the public think it is very or fairly likely that the country will become more divided in the next 12 months (with only 13% thinking it is unlikely)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2017). NB. 'Don't Know' responses not shown



There is widespread dismay about the political system and a lack of faith in politicians' ability to solve the country's problems

Optimism about effective government and politics



74%

of the public agree that 'the UK political system is currently not fit for purpose' (only 5% disagree)

6%

of the public agree that 'UK politicians understand people like me' (and 72% disagree)

"Brexit has made me have a complete lack of trust. Doesn't matter what we want, what we voted for, who we voted for. It doesn't count. They know better than us."
(50-70, Leicester, Leaver)

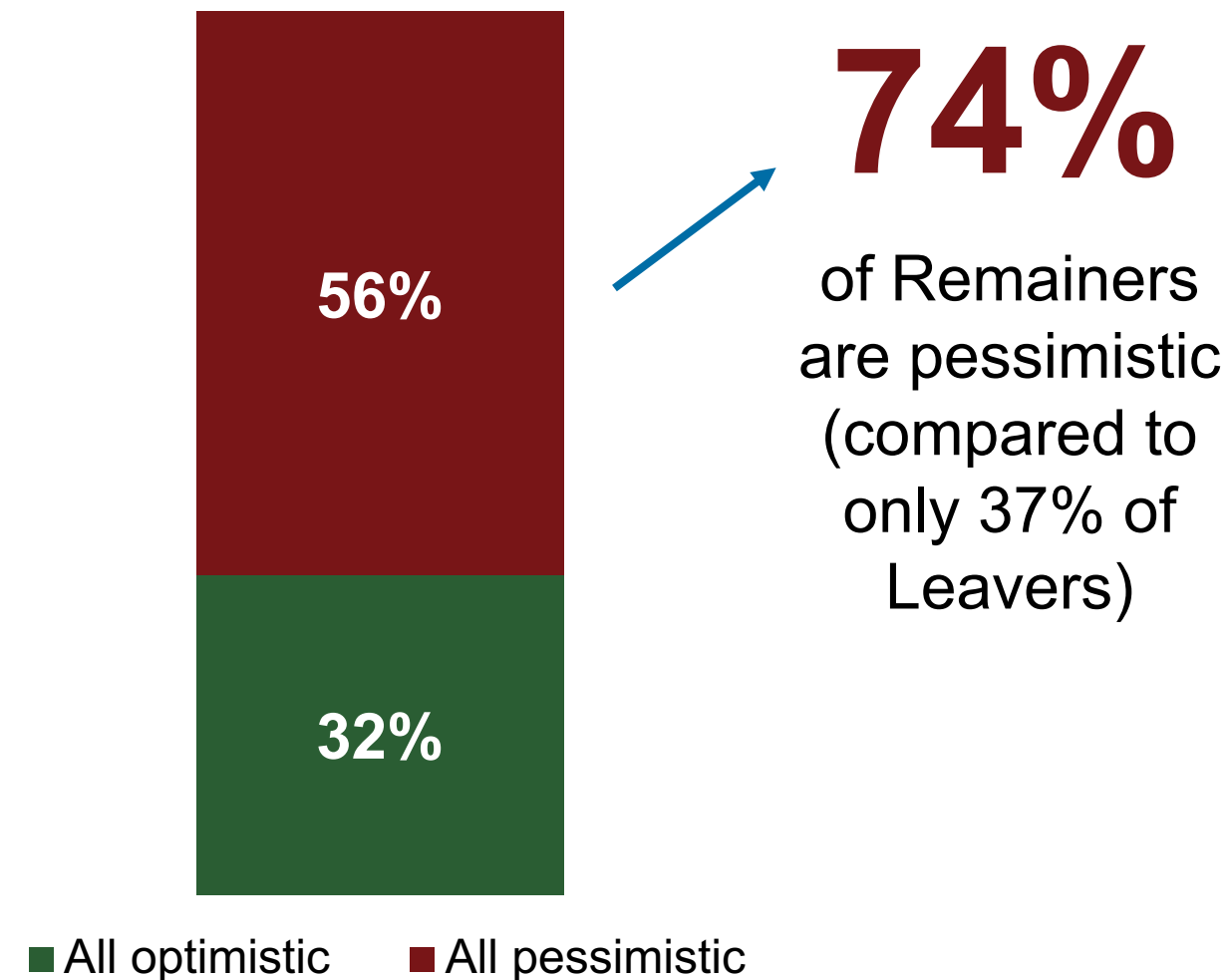
"I think we lack political leadership in both the main parties and I don't see that changing which is quite terrifying given the challenges that we face... I think political discourse is dominated by the extremes on both sides."
(18-34, London, Remain)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017). NB. 'Don't Know' responses not shown.
Q8. For each of the statements below, please state whether you agree or disagree. Base: All respondents (n=2,017). NB. 'Don't Know' responses not shown.



Many (particularly Remainers) are pessimistic about the national economy – with some distrust of official employment figures

Optimism about the economy



"In 10-15 the economy might all be sorted out but I'll be 45-50. Now is when I want to buy a house. In 200 years, it might seem like a blip but actually this is an important part of my life right now."
(18-34, London, Remainder)

"The unemployment rate [is a sign of the country doing well]. Regardless of whether May has been a good PM. Partly because they've clamped down on the benefits system and pushed them into work."
(40-65, London, Leaver)

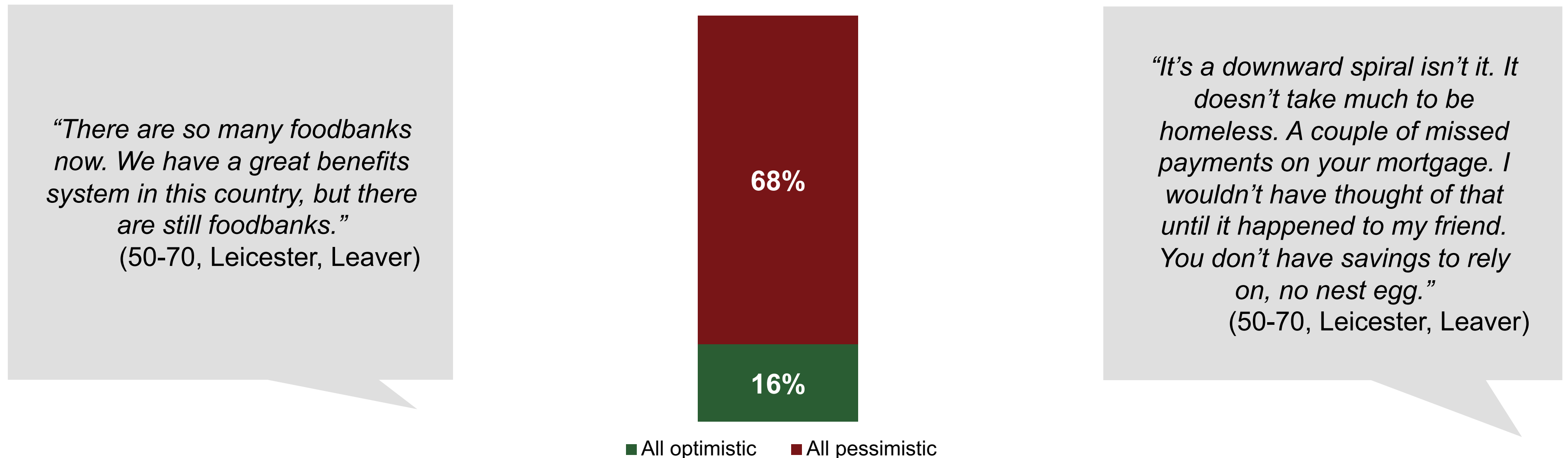
"Employment is at a record low so something must be good. I hope no-one is cooking the books with these figures."
(50-70, Leicester, Leaver)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017)



There is significant pessimism about poverty levels in the UK, with many pointing to recent, tangible signs like foodbanks

Optimism about poverty levels



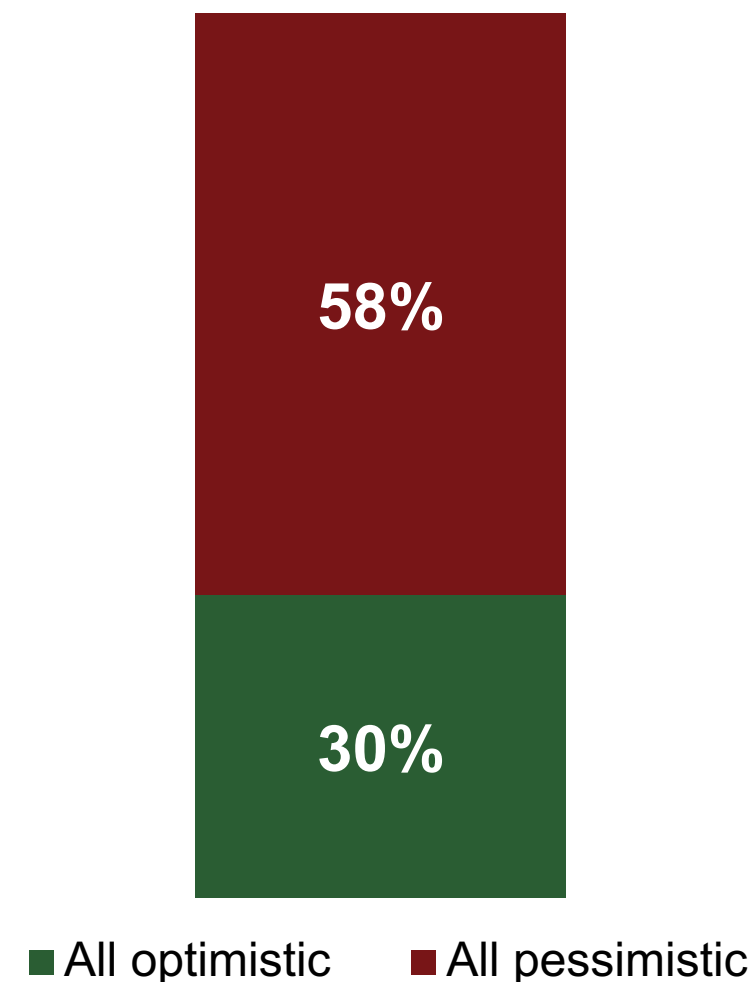
Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017)



While the environment is seen as an important issue, there is some defeatism about the UK's ability to make a significant difference

"I had a McDonald's and I had a cardboard straw rather than a plastic one. I mean, the straw got soggy halfway through but I like that we're doing it."
(50-70, Leicester, Leaver)

Optimism about environment and pollution



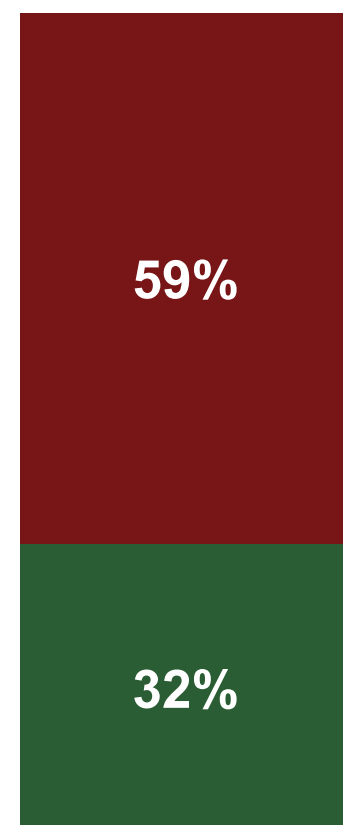
"I think we can't do it as a country, it's a world thing. We're not a polluting country. The US, China, Brazil, they're just laughing at us."
(50-70, Leicester, Leaver)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017). NB. 'Don't Know' responses not shown.



Most are pessimistic about NHS capacity, management and funding (though Remainers are more worried than Leavers)

Optimism about the NHS



■ All optimistic ■ All pessimistic

66%

of Remainers
are pessimistic
(compared to
53% of
Leavers)

“At the moment, you’ve got people just flooding in. It’s affecting the NHS, housing, everything. There’s only so much water you can fit into a glass.”
(50-70, Leicester, Leaver)

“We’ve never had a Government pour enough money into the NHS.”
(18-34, London, Remainder)

“There’s a lot of things that hospitals used to do and now say they won’t. So people are going abroad for it.”
(35-49, Leicester, Remainder)

Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017)



These factors combine to create a powerful sense among many (especially older people) that the UK is in national decline

“The way the world sees where Britain was, the little island with a massive history. But now what can we say we do? We don’t manufacture a fifth of what we did, we don’t create opportunities, we’re no longer creating the schools, a loss of dignity and pride. Now you see French and Germans laughing at us.”
(35-49, Leicester, Remainer)

72%

of the public agree that ‘British values (e.g. respect, freedom of speech, manners) are in decline’

73%

of the public agree that ‘the UK is currently seen as a laughing stock by the rest of the world’

82%

of over-65s agree (compared to 54% of 18-24s)



“We were summed up by Theresa May in her resignation speech. She cried. Tried my best, couldn’t do it.”
(50-70, Leicester, Leaver)

Q8. For each of the statements below, please state whether you agree or disagree. Base: All respondents (n=2,017)

4

Feelings about the local area

Many feel optimistic about their ‘friendly’ and ‘happy’ local areas – but there are a number of widespread concerns, too

“Living in Surrey, you’re well-connected. It’s safe and peaceful. A nice environment being in a village. Everyone is friendly. It’s an ideal scenario for my kids.”
(40-65, London, Leaver)



"I think my personal local area is thriving. Shops are closing but there are also shops opening and I think you forget that. I think it's important to focus on the good and the bad but not let the bad bring me down."

(35-49, Leicester, Remainder)

Q1. What three words would you use to describe how you currently feel about your local area? Base: All respondents (n=2,017). NB. Only 25 most common words shown.

While there are some clear sources of optimism, there are also strong drivers of pessimism towards the local area



Things to do



Sense of community



Attractive spaces



Economic decline



Crime



Homelessness



Decline of the high street



Housing and development

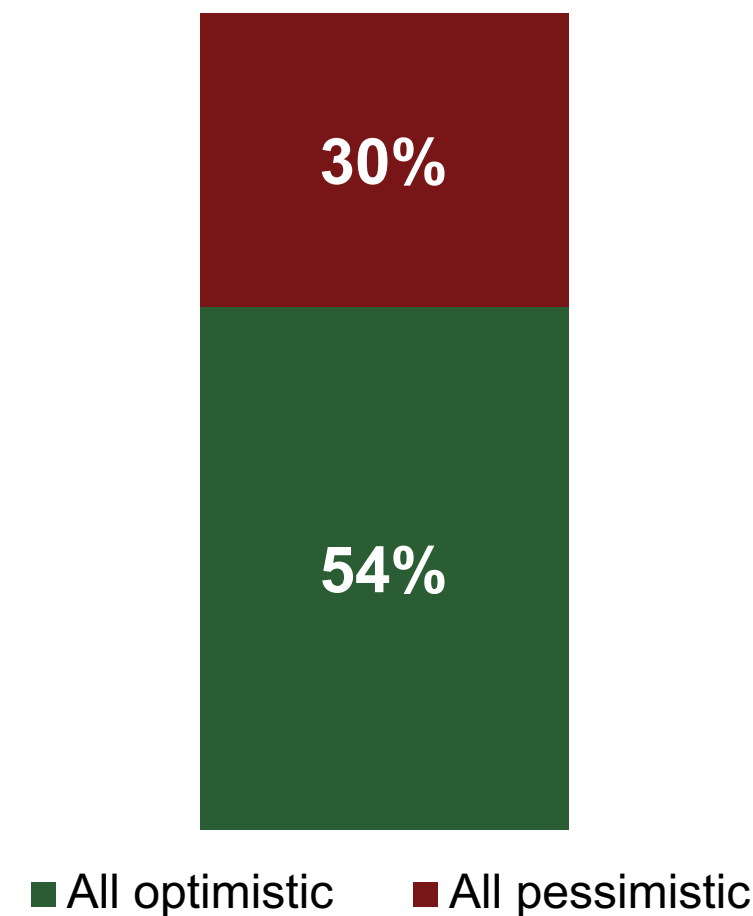


A sense of community, ‘things to do’ and high quality spaces tend to contribute to a sense of pride and positivity in the local area

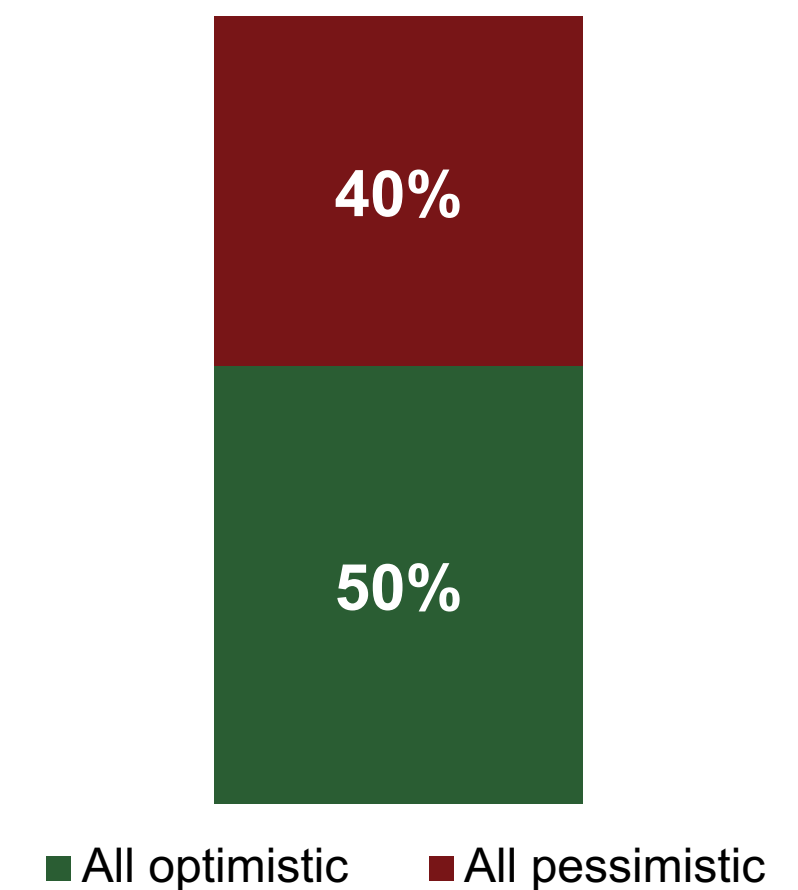
“Locally my thoughts are optimistic. I like the area I live in and...I hope that my boys will live in the similar area.”
(35-49, Leicester, Remainer)

“I’m a London boy and I appreciate everything that is available to the residents of London. But I can’t really talk for the other areas of the country, only London where I’m fortunate enough to be.”
(40-65, London, Leaver)

Optimism about entertainment and leisure opportunities



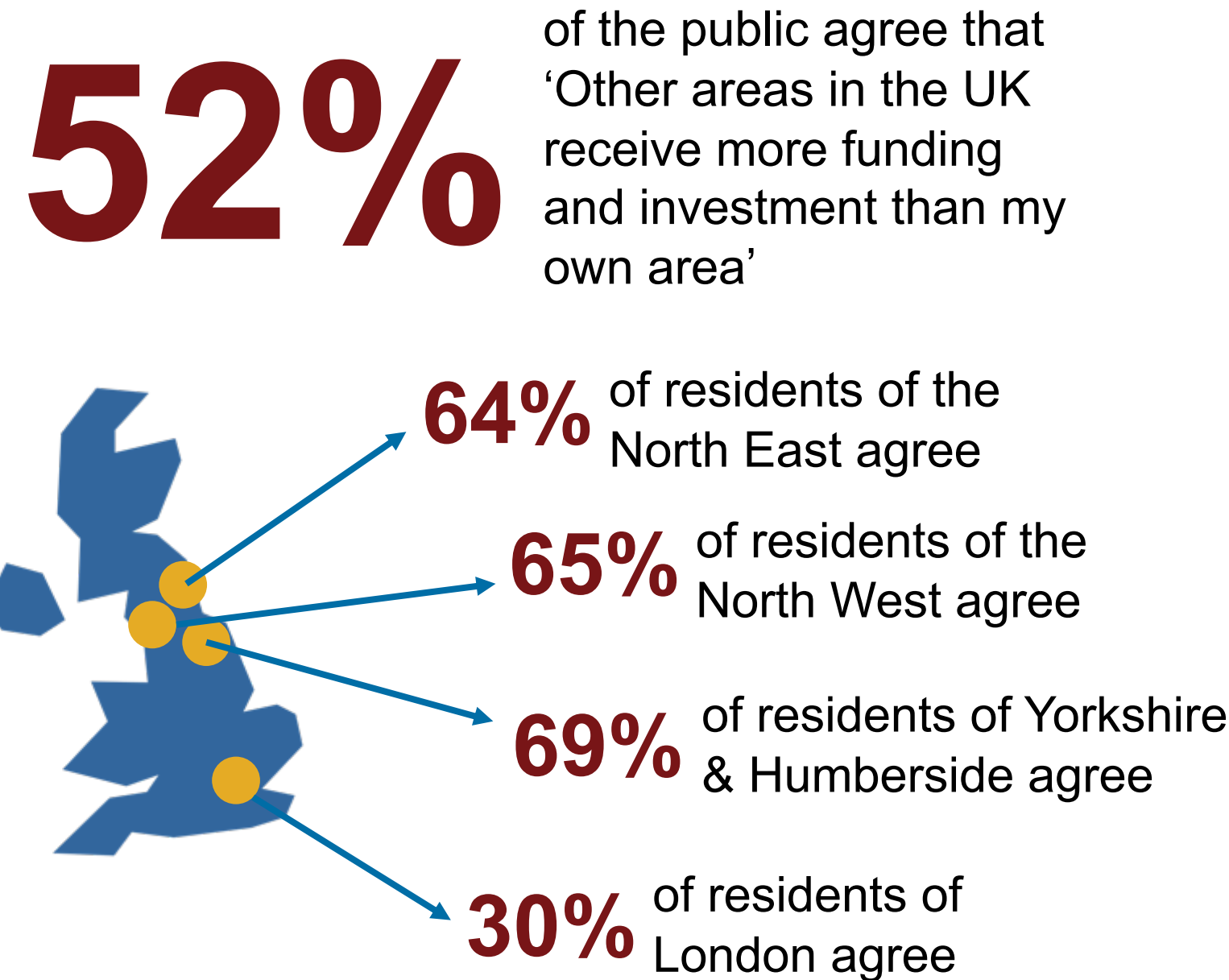
Optimism about upkeep and maintenance of the local area



Q.5 Thinking now about your local area, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017). NB. ‘Don’t Know’ responses not shown

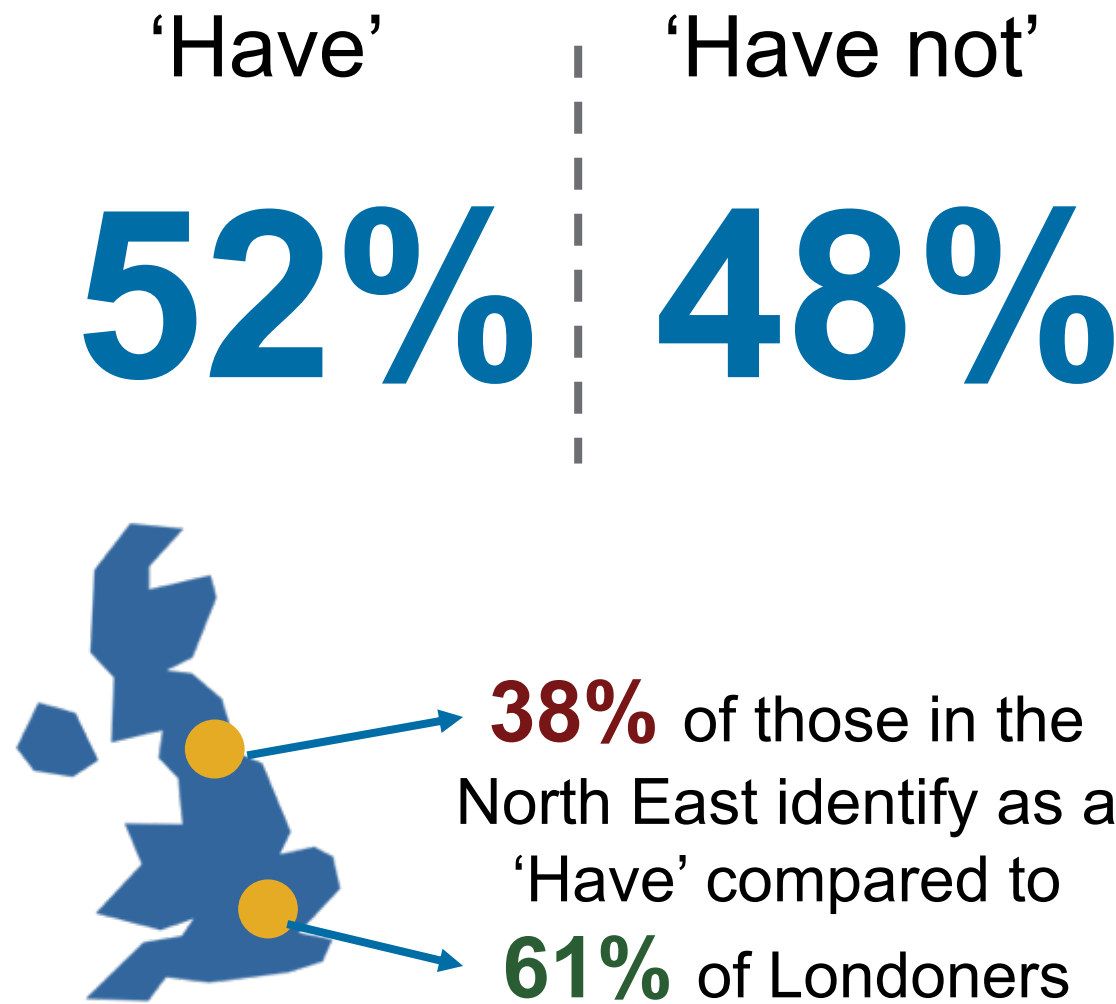


Residents of some areas are much more pessimistic, bemoaning economic decline and perceived unfair lack of investment



"Things will get worse as they are going. I worked in a factory when I left school, and there were so many factories in Leicester. Are there any left?"
(50-70, Leicester, Remainder)

Society is split between 'haves' and 'have nots'



Q8. For each of the statements below, please state whether you agree or disagree. Base: All respondents (n=2,017)
Q9. People often talk about our divided society nowadays and how Britain is now a nation of 'Haves' and 'Have nots'. Which group do you feel best describes you? Base: All respondents excluding those who selected 'Don't Know / No Opinion' (n=1,349)



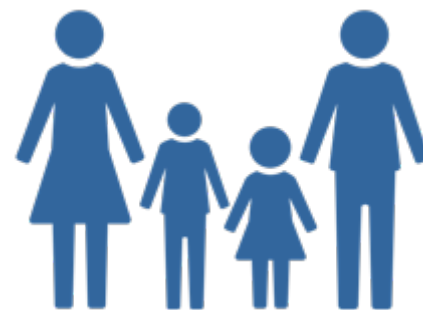
Fear of crime is pervasive and vivid, feeling 'closer to home' than ever before

19%

Think it is likely that 'I or someone close to me will be a victim of violent crime' over the next year or so



29%
of Londoners agree



25%
of parents agree

"Crime is a massive issue for me because I've actually seen it. When I work in the city centre you can see it first-hand happening outside the window. When it gets that close to home, you've got to sit up and think 'What is going on?' It really does affect your life."
(50-70, Leicester, Leaver)

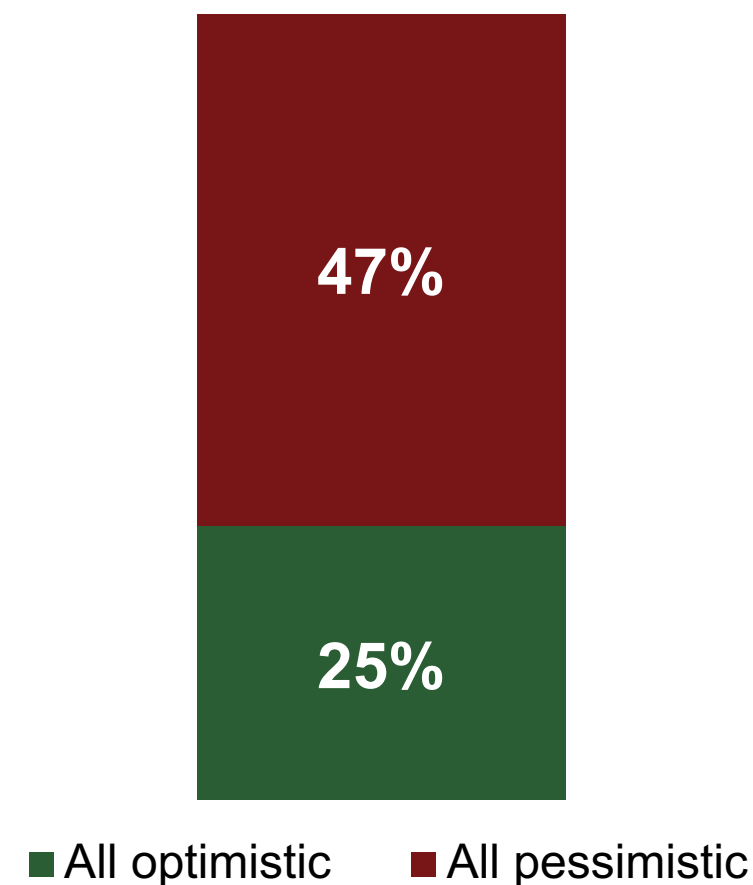
"Crime is going through the roof. My husband's car was broken into and the police won't come out unless there's a bloodbath... It's always been there but it's now coming close to home on your doorstep."
(35-49, Leicester, Remain)

Q7. How likely or unlikely do you feel it is that each of the following will happen in the next year or so? Base: All respondents (n=2,017)



Homelessness and poverty are increasingly visible on a local level across the country

Optimism about homelessness in local area



"Rough sleeping is getting worse day-by-day. You see more people on the streets, begging and asking for money."
(50-70, Leicester, Leaver)

"Homelessness worries me. I live in Shoreditch, Hackney, and there's a huge homeless issue there."
(18-34, London, Remain)

"Practically every business doorway has a homeless person on it. You get people fighting for their spots now."
(50-70, Leicester, Leaver)

Q.5 Thinking now about your local area, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017). NB. 'Don't Know' responses not shown.



Many local high streets are seen to be dying, with bookmakers, charity shops and fast food chains (if anything) replacing independent shops

“All the independent shops are gone. It’s all chicken shops and bookies. Now some of the bookies are being shut down and replaced with student living.”
(18-34, London, Remainer)

78%

of the public think it is likely that ‘More shops will close than will open on my local high street’ over the next year or so (with only 10% thinking it unlikely)

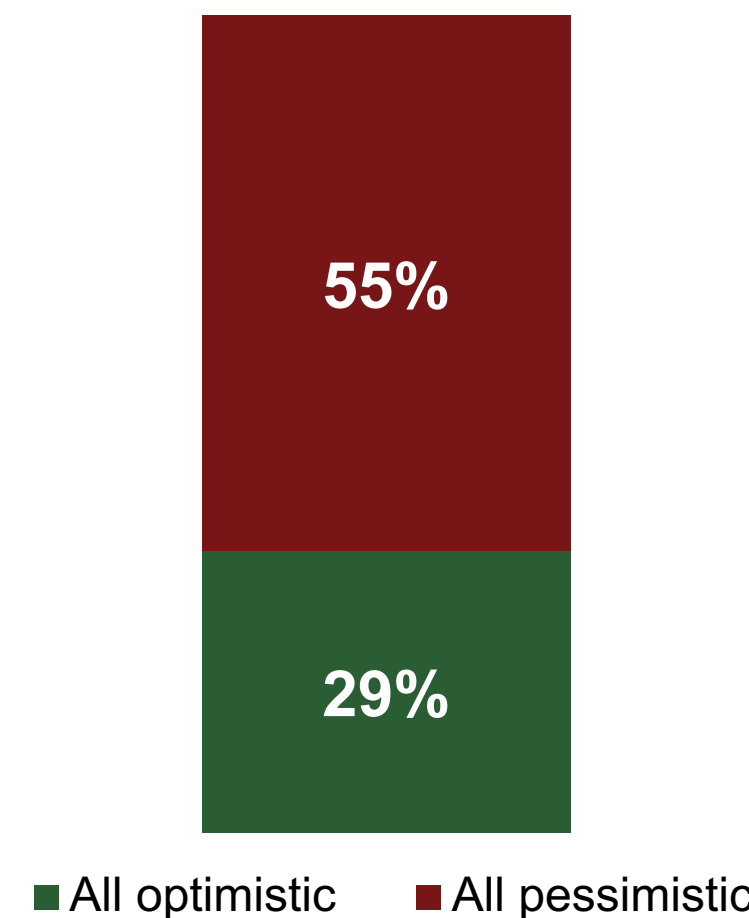
“It’s worrying when businesses that have been around since you’ve grown up are closing. They are part of you, you’ve grown up with them.”
(50-70, Leicester, Leaver)

Q7. How likely or unlikely do you feel it is that each of the following will happen in the next year or so? Base: All respondents (n=2,017)



There is a perceived housing crisis: because of both a lack of affordable housing and inadequate infrastructure

Optimism about affordability of housing



45%

of the public think it is likely that 'More houses will be built than my local area can cope with' over the next year or so (with 40% deeming it unlikely)

"I want my children to get onto the property ladder. It's a standing joke that Asian kids don't get onto the property ladder. My children live with me and they're old. It's so difficult to get them onto the ladder."
(50-70, Leicester, Leaver)

"The area is changing a lot with the amount of development that's going on but there isn't the infrastructure anymore. Travelling is a nightmare and you can't get GP appointments."
(50-70, Leicester, Leaver)

Q.5 Thinking now about your local area, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017). NB. 'Don't Know' responses not shown.
Q.7. How likely or unlikely do you feel it is that each of the following will happen in the next year or so? Base: All respondents (n=2,017)

5

Feelings about personal life

People are generally optimistic about their personal lives, with most feeling happy and content



Q1. What three words would you use to describe how you currently feel about your personal life? Base: All respondents (n=2,017). NB. Only 25 most common words shown.

There are four issues which have a big impact on how optimistic or pessimistic the public feel about their personal lives



Personal finances



Work



Health

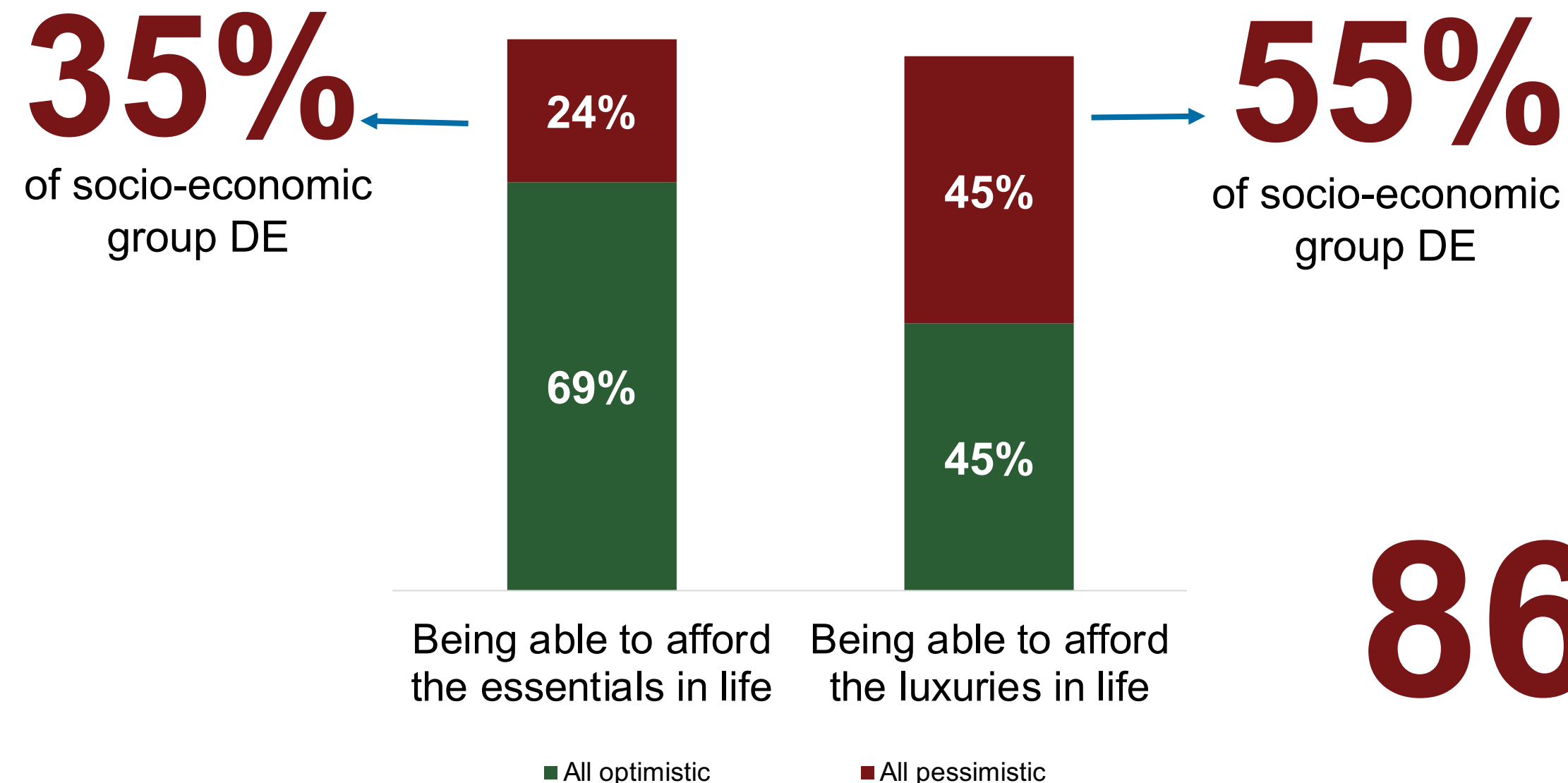


Children's prospects



While many feel comfortable, a significant minority have financial concerns – and few think things will become more affordable

Optimism about personal finances



“You have lots of hidden loans. Phone contracts. Broadband contract. £5 a month here. £10 a month there. It’s hidden money, you’re just pressing buttons on your phone.”
(50-70, Leicester, Leaver)

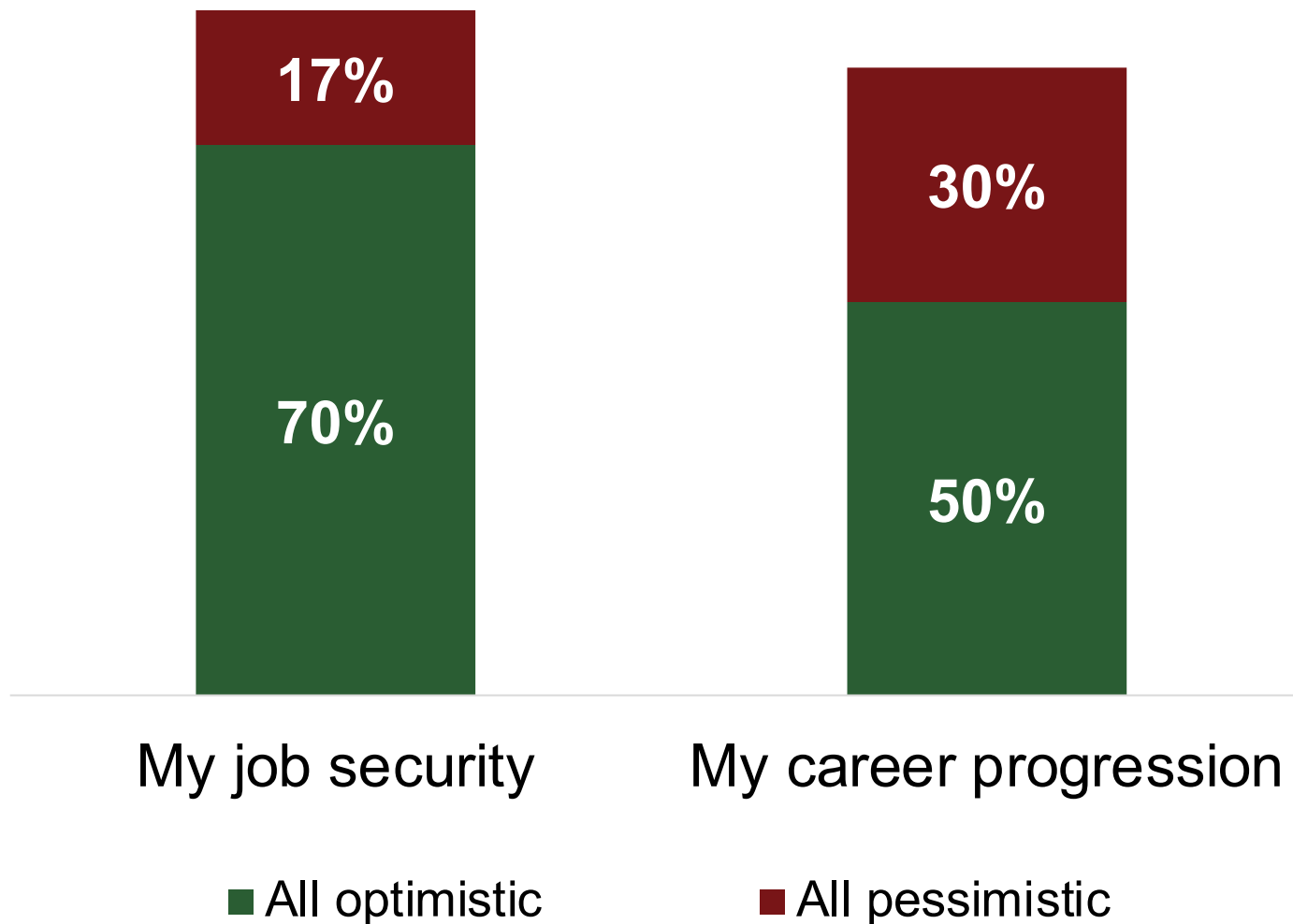
86% of the public think the cost of living is unlikely to go down in the next year (only 6% think it is likely to go down)

Q4. Thinking now about your personal life, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017) NB. ‘Don’t Know’ responses not shown
Q7. How likely or unlikely do you feel it is that each of the following will happen in the next year or so? Base: All respondents (n=2,017) NB. ‘Don’t Know’ responses not shown



There is some anxiety, too, about stability of work and employment opportunities – with 1 in 5 pessimistic about their job security

Optimism about employment situation



"I'm pretty uncertain at the moment. My job is in the retail sector and it's not doing so well at the moment so that reflects my life."
(18-34, London, Remainder)

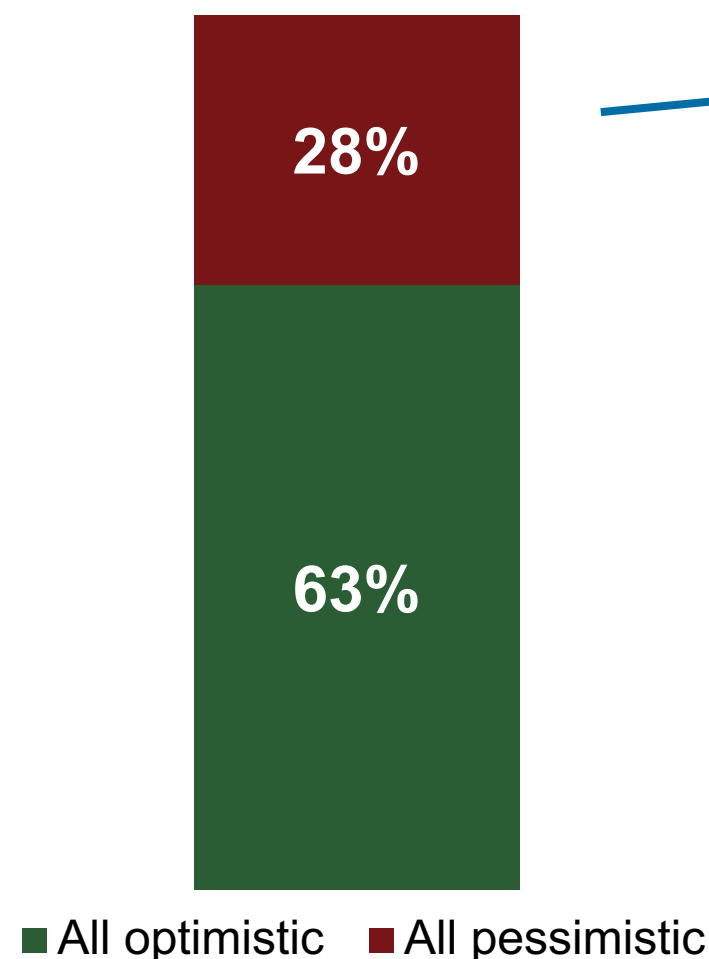
"I know it's meant to be record employment but there are job losses. My husband just got made redundant from his printing job."
(50-70, Leicester, Leaver)

Q4. Thinking now about your personal life, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents in employment (n=1,135) NB. 'Don't Know' responses not shown



Health worries can also have a significant negative impact on people's personal optimism

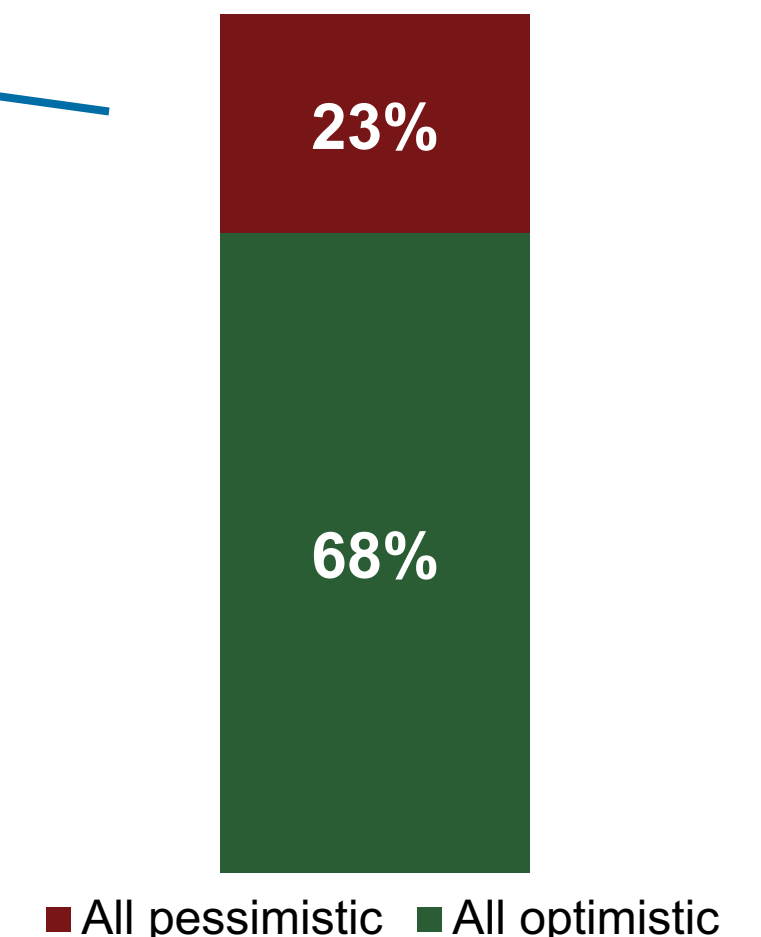
Optimism about physical health



36%
of socio-economic
group DE

30%
of socio-economic
group DE

Optimism about mental health



59%
of the public feel
pessimistic about the NHS
over the next 12 months

Q4. Thinking now about your personal life, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017) NB. 'Don't Know' responses not shown
Q6. Thinking now about the UK as a whole, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2017) NB. 'Don't Know' responses not shown

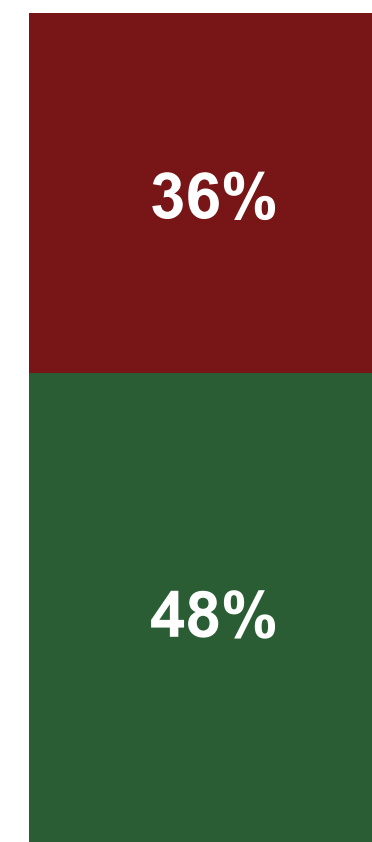


Even among those who were generally optimistic about their personal lives, there was concern about children's prospects

Optimism about my children's future prospects: job opportunities, home ownership

"I'm worried about the children's futures. There's not that much out there at the moment. My kids have two degrees each but they can't get a job. I've stopped saying proper job now – get any job."

(50-70, Leicester, Leaver)



■ All optimistic ■ All pessimistic

"I want my children to get onto the property ladder. ..my children still live with me and it's so difficult for them. I'm trying to give them a helping hand but it's bit by bit."
(50-70, Leicester, Leaver)

Q4. Thinking now about your personal life, to what extent are you feeling optimistic or pessimistic about the following over the next year or so? Base: All respondents (n=2,017) NB. 'Don't Know' responses not shown

There is a sense that the British public is resilient and able to ‘just get on with things’, despite the national gloom and negativity

“I think it’s all about being open-minded. It’s all about your mindset, it’s how you think about it. We’re all uncertain at the moment so it’s about being open-minded, which leads to optimism for me.”

(18-34, London, Remainer)

“You’ve got to be upbeat. If you get up in the morning and are down in the dumps and listen to too much Brexit palaver, you’ll get down. You need to turn that off sometimes.”

(50-70, Leicester, Leaver)

“I think that it doesn’t matter what’s going on behind the scenes. If you’re British you just carry on. When France has a problem, they protest and riot. Here, we sit back. Let’s go to Tesco and get some beers.”

(35-49, Leicester, Remainer)

69% of the public agree that ‘British people will just get on with things, regardless of the impact of Brexit’

Q8. For each of the statements below, please state whether you agree or disagree. Base: All respondents (n=2,017)

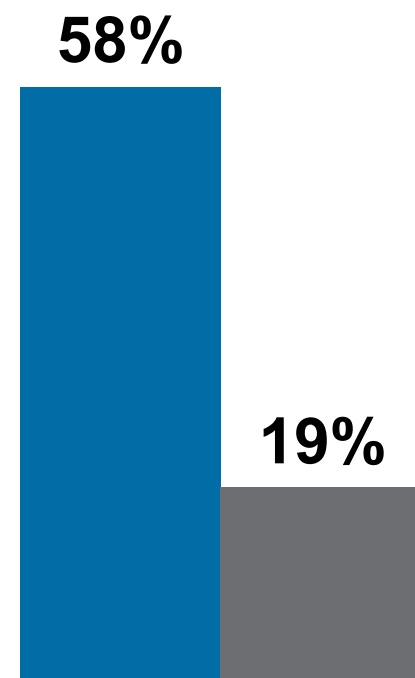
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What next?

Do you think it is likely that the following will happen in the next year?

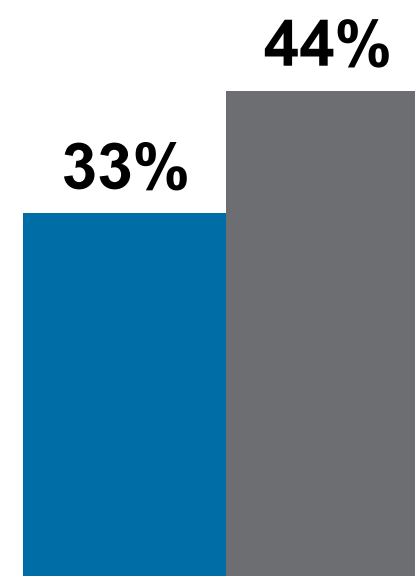
The UK will leave the EU

■ Likely ■ Unlikely



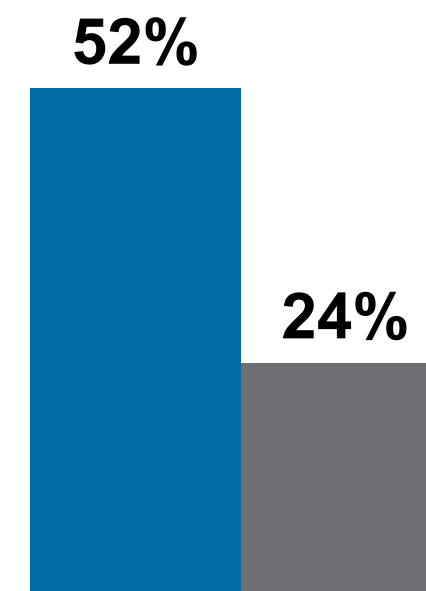
There will be another referendum on the UK's membership of the EU

■ Likely ■ Unlikely



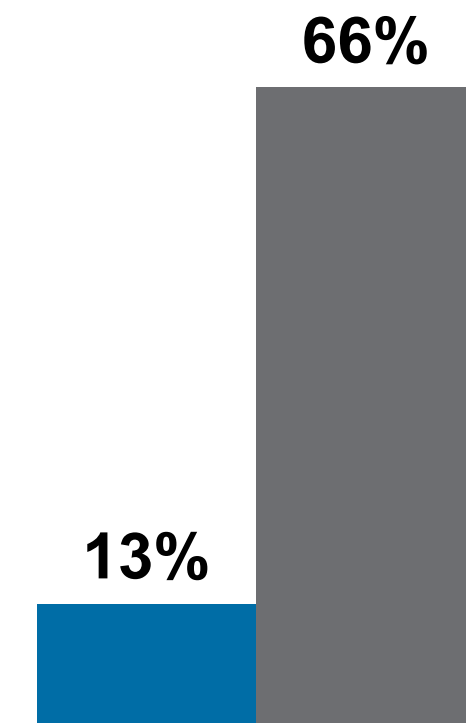
Boris Johnson will become Prime Minister

■ Likely ■ Unlikely



Jeremy Corbyn will become Prime Minister

■ Likely ■ Unlikely



Q7. How likely or unlikely do you feel it is that each of the following will happen in the next year or so? Base: All respondents (n=2,017)

Thank you

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