

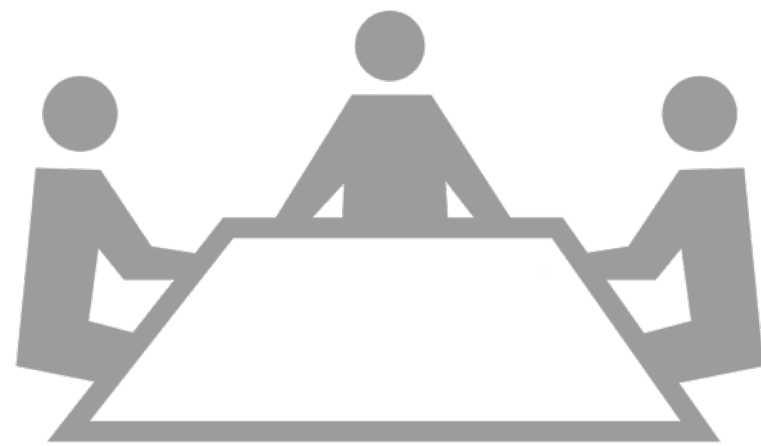
9th January 2018

The Year Ahead

The nation's mood in 2018

britainthinks.com

We wanted to see how the nation is feeling about the year ahead



Focus groups in Watford

3rd January 2018

1. Younger group (18-30), Labour-leaning
2. Older group (55+), Conservative-leaning

National Poll

5th – 7th January 2018

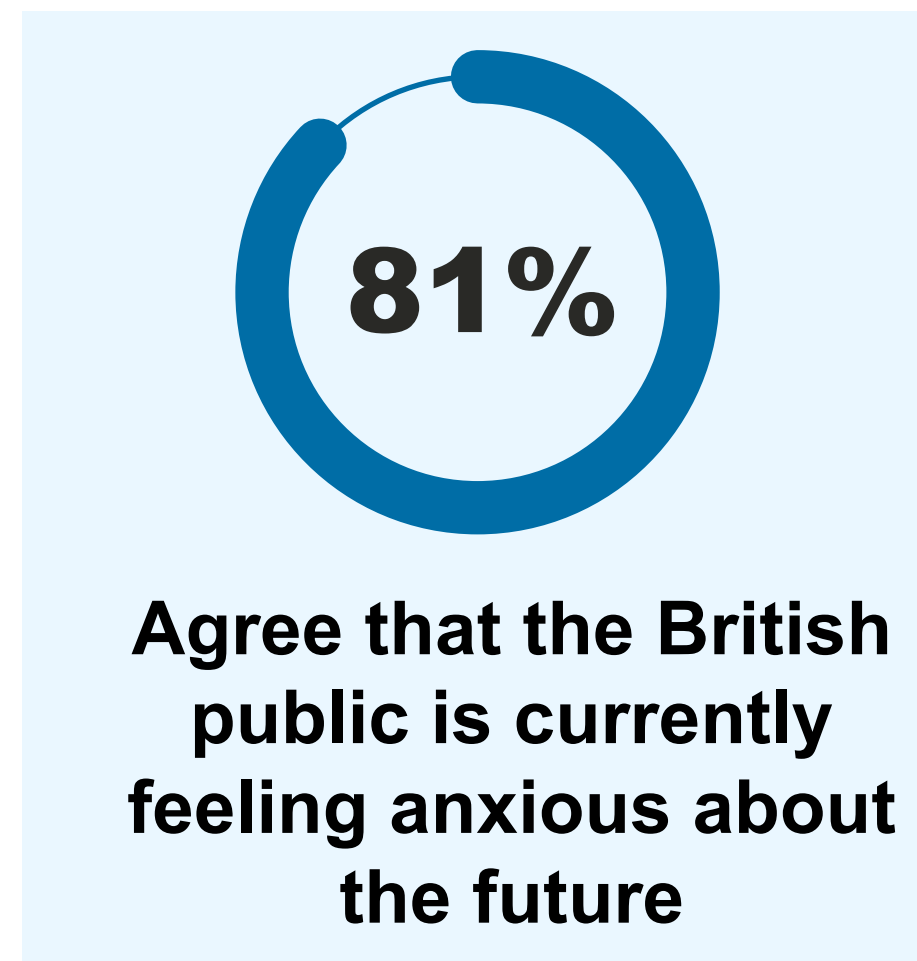
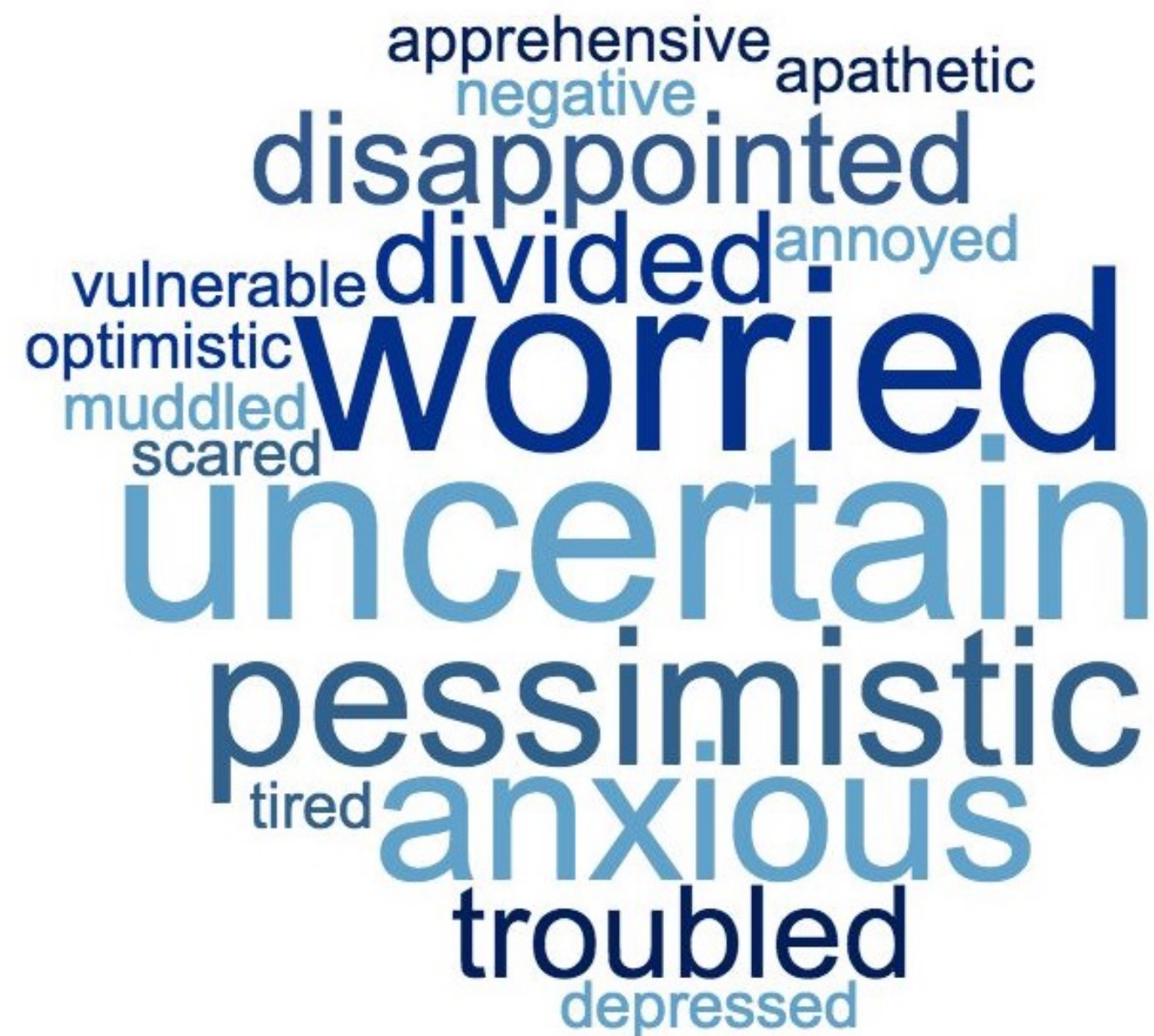
Nationally representative sample of 2,051
GB adults aged 18+

The 5 most important things that we've learned

- 1.** The nation is feeling anxious about 2018 and the year ahead is characterised by uncertainty
- 2.** Younger people's outlook for 2018 is particularly bleak
- 3.** Brexit continues to be a worry, while concerns about the NHS and housing are on the rise
- 4.** Theresa May's reputation was devastated during 2017 and expectations are low for 2018
- 5.** Jeremy Corbyn's strength derives in part from May's weakness but also because his heartland issues are rapidly rising up the agenda

01 **The nation is feeling anxious about 2018 and the year ahead is characterised by uncertainty**

Uncertainty, anxiety and worry are dominating the national mood

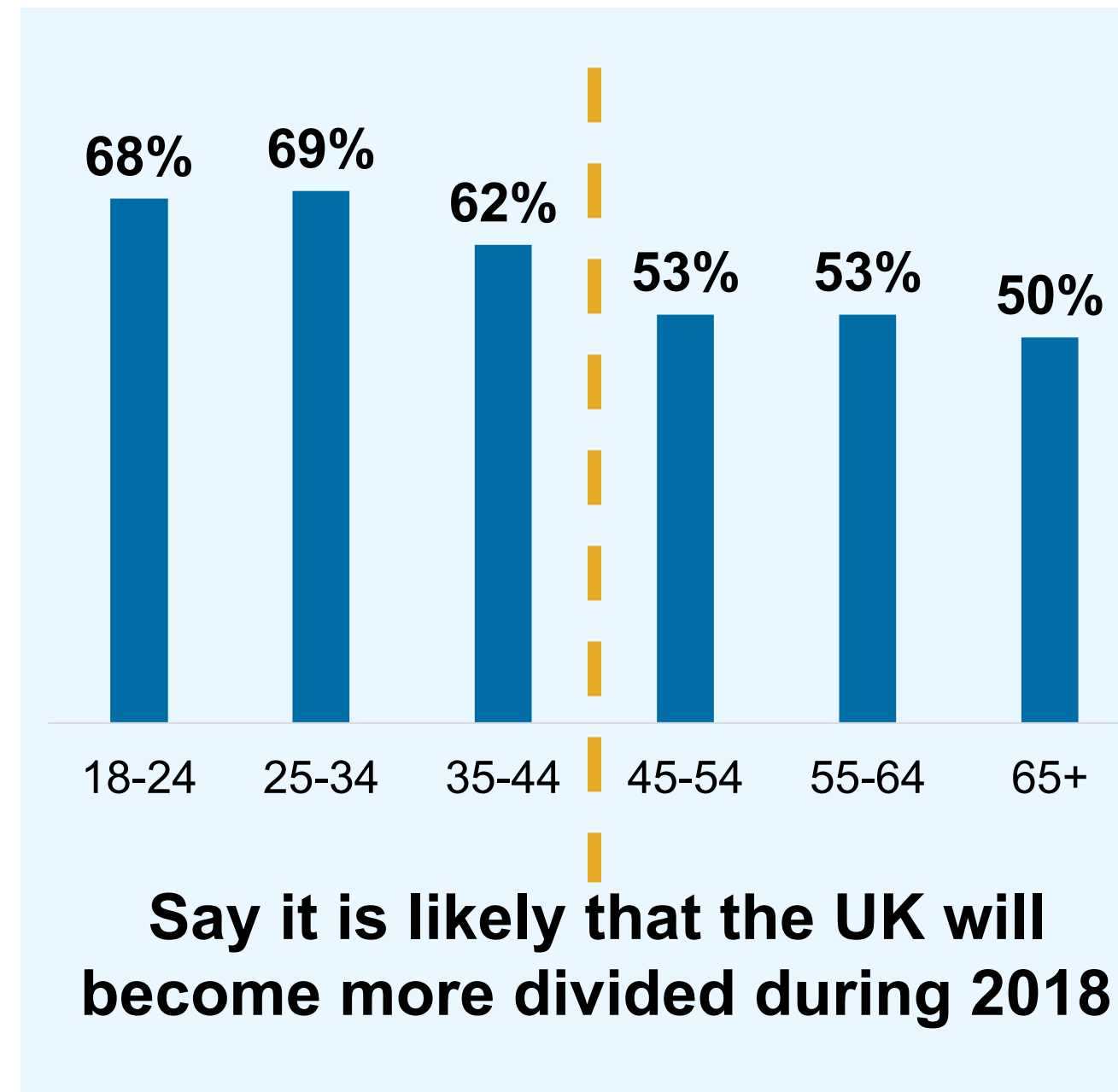
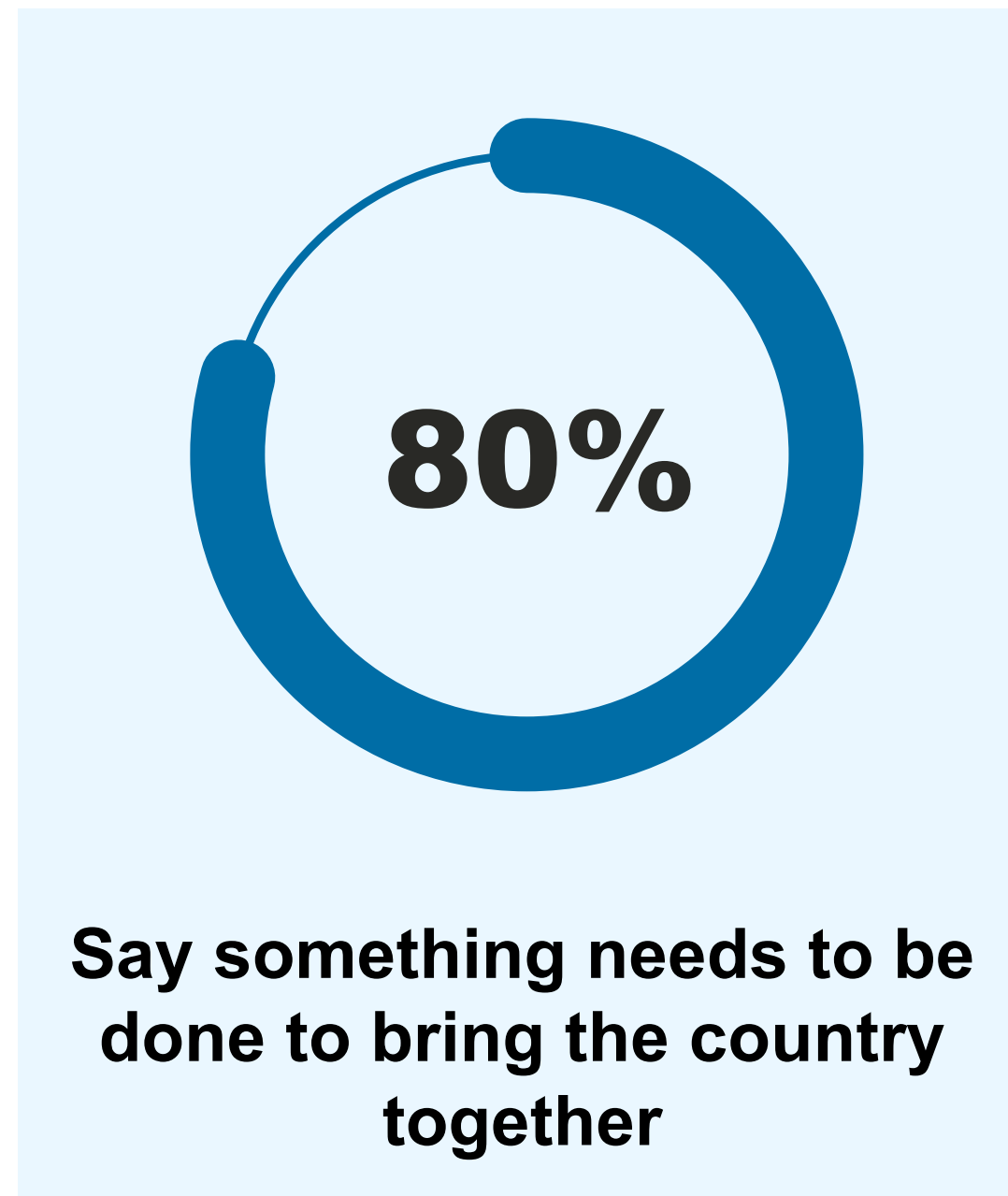


"[I think the nation is feeling anxious] from the previous year and what's happened with politics and the EU. The uncertainty."
(Participant, 18-30)

Q. What 3 words sum up the 'mood of the nation' in 2018?

Q4. To what extent, if at all, do you agree or disagree with the following statement: The British public is currently feeling anxious about the future? Base: All respondents (n=2051)

Society feels very divided and there is an urge to ‘bring the country together’



“I think with the Brexit negotiations and what’s going on, we do feel divided.”
(Participant, 18-30)

“The country is divided, and with Brexit will we feel the pinch more and be more divided like America?”
(Participant, 18-30)

Q4. To what extent, if at all, do you agree or disagree with the following statement: Something needs to be done to bring the country together?/ Q3: How likely or unlikely do you feel it is that each of the following will happen in 2018: The UK will become more divided? Base: All respondents (n=2051)

There are few sources of pride in the UK

- Those that exist don't really impact on people's lives and are beyond the scope of government
 - The Royal Family, heritage and tradition were described as things about Britain that the rest of the world envy
- But there is nostalgia for 'British values'; an instinct for collectivism as exemplified by the NHS and 'pulling together' in adversity (e.g. terrorist attacks and Grenfell Tower)
- And when tasked with writing a motto for Britain that highlights our best assets, this is what our groups focused on
 - "British values remain"/ "Together in adversity"/ "All things bright and beautiful"



*"I think recently in the past year with the terrorist attacks and Grenfell Tower, seeing communities coming together and how the nation comes together in an emergency. It's a nice thing to see."
(Participant, 18-30)*

02 Younger people's outlook for 2018 is particularly bleak

There was a marked difference between the younger and older people we spoke to and their personal expectations for the year ahead

Martin, 27



- Martin is a painter & decorator, a DJ and a football coach
- He lives with his wife and 2 young children in Bushey
- Martin is concerned about finances and rising prices. He's looking forward to family events such as his children's birthdays but these also trigger further worries (e.g. affording presents)

"I'm trying to be positive but it doesn't last long. Money is tight."

Margaret, 66

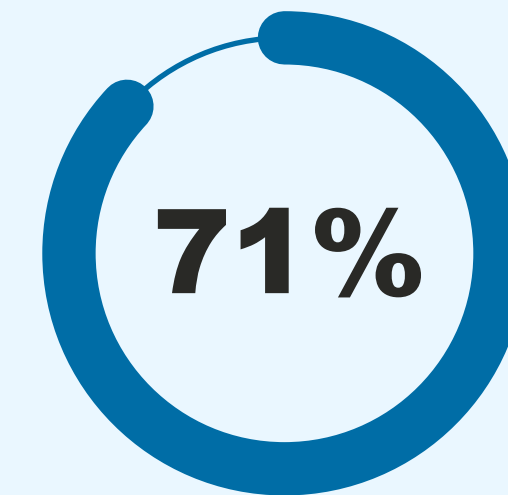


- Margaret is a retired administrator and lives with her husband in Watford
- She has 4 children and 11 grandchildren
- Margaret is looking forward to spending time with her grandchildren. She's comfortable in her own situation but has concerns for them (e.g. will they have to move away to be able to buy a house?)

"I'm excited to see my grandchildren do well at school and college."

Younger people are particularly worried about the year ahead and feel a sense of injustice – resenting older generations and ‘benefit scroungers’

- Every year it feels increasingly hard to get by, and this is expected to continue into 2018
- They cannot physically work any harder – with some doing several jobs - but still feel excluded from just reward unlike older generations
 - As a result of lower wages, job insecurity, the cost of childcare and house prices
- This has led to a heightened sense of ‘benefit scroungers’ who have a better deal than they do
 - Particularly with regards to housing



Agree that hard work no longer delivers the rewards that it should

“We pay for rent and our rent is quite extortionate even though we’re in a small flat, and then there’s other people with three-bedroom houses that aren’t paying anything, they’re getting them off benefits.”

(Participant, 18-30)

Q4. To what extent, if at all, do you agree or disagree with the following statement: Hard work no longer delivers the rewards that it should? Base: All respondents (n=2051)

Meanwhile older people feel more positive about the year ahead, but also nostalgic about the past

- They already have everything that younger people are worried about – a stable income and owning their own home
- They do have concerns, but these are typically fairly abstract and don't directly impact on them
 - For example, worrying about homelessness
 - But also their children – especially those with children who have recently finished education and are looking for a job
- And they also feel a strong sense of nostalgia for a past idyll, in which:
 - People had proper (manufacturing) skills,
 - People were paid a fair wage for their work, and
 - You could speak your mind without worrying about being PC

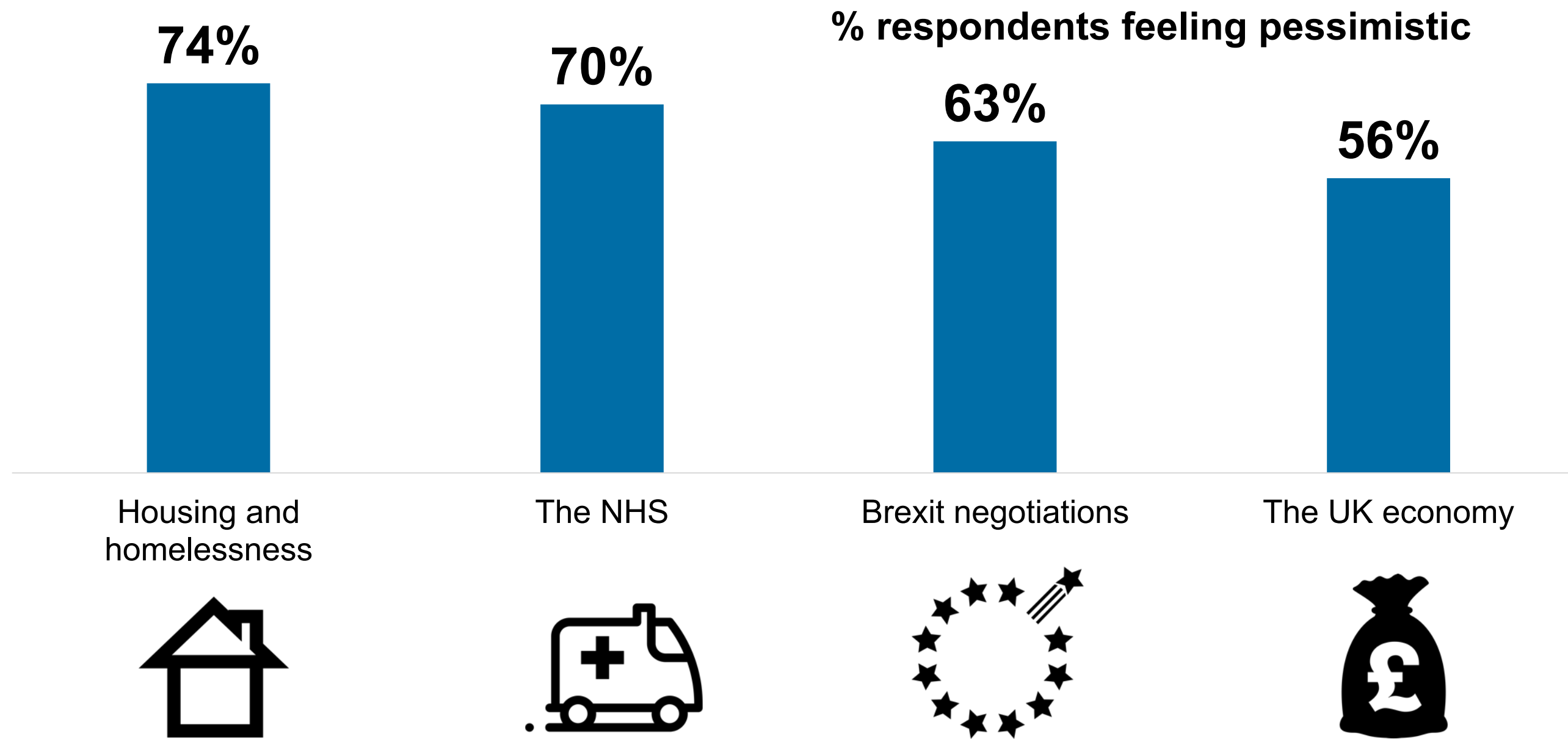
“You’ve got to be careful with what you say these days. You can’t say what you like anymore because the grandchildren are growing up in a different world and they say ‘Nan, you’re being racist’.”
(Participant, 55+)



03

Brexit continues to be a worry, while concerns about the NHS and housing are on the rise

Homelessness and the NHS are top of the list of issues facing the UK that the public is feeling pessimistic about for the year ahead



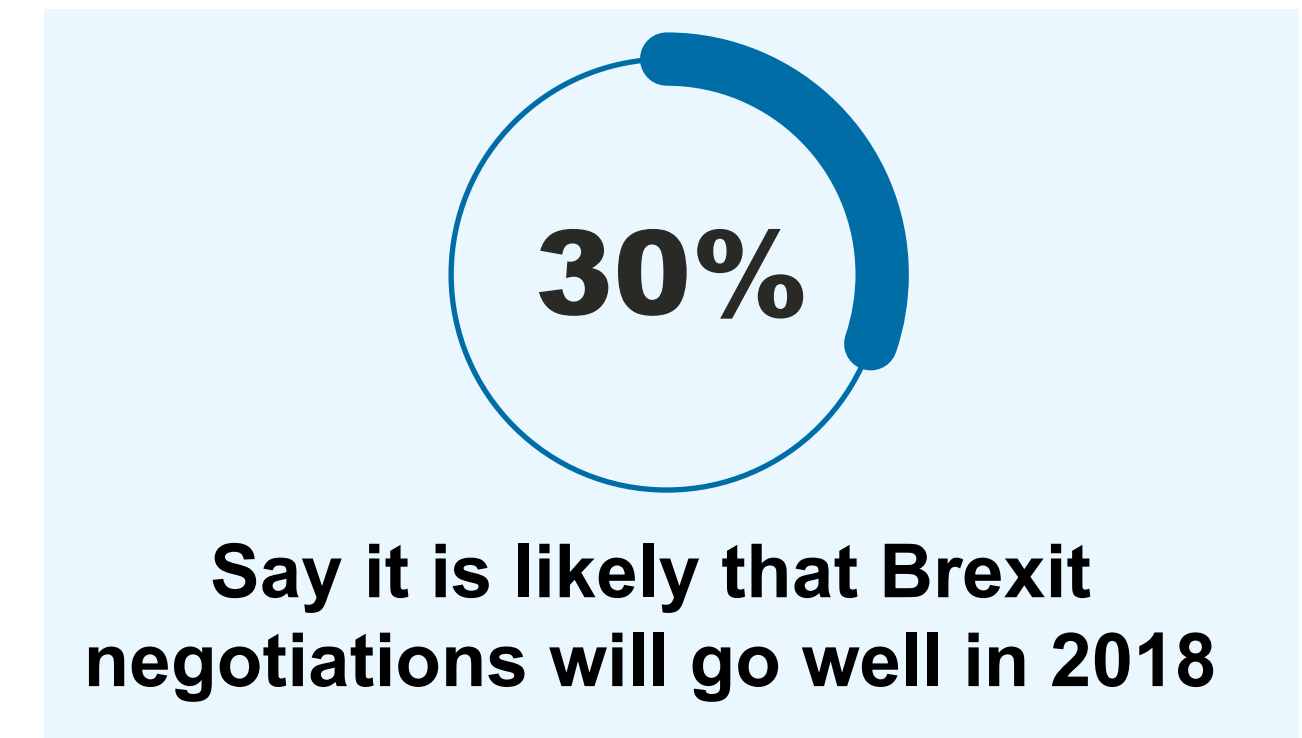
*"[The NHS] just gets worse every year and it will continue to do so. They need to put more money in and that should be a priority."
(Participant, 18-30)*

*"We're one of the richest countries in the world and yet there's a lot of people sleeping on the road tonight."
(Participant, 55+)*

Q1: Thinking about the year ahead, how optimistic or pessimistic do you feel about each of the following? Housing and homelessness Base: All respondents not selecting DK (n=1755) The NHS Base: All respondents not selecting DK (n=1891) Brexit negotiations Base: All respondents not selecting DK (n=1834) The UK economy Base: All respondents not selecting DK (n=1864)

While little progression in Brexit negotiations is expected this year, there are few calls for another referendum or vote on the final deal

- Few expect negotiations to move forward this year
 - Leadership isn't strong enough and government divided
 - Means that they can't come to an agreement and the EU are able to hold us to ransom
- But, most expect the UK will leave in the end
 - Referendum result is final and the EU wouldn't let us back in anyway
- And another vote wasn't welcomed by those we spoke to for fears that it would slow the process down *even more*

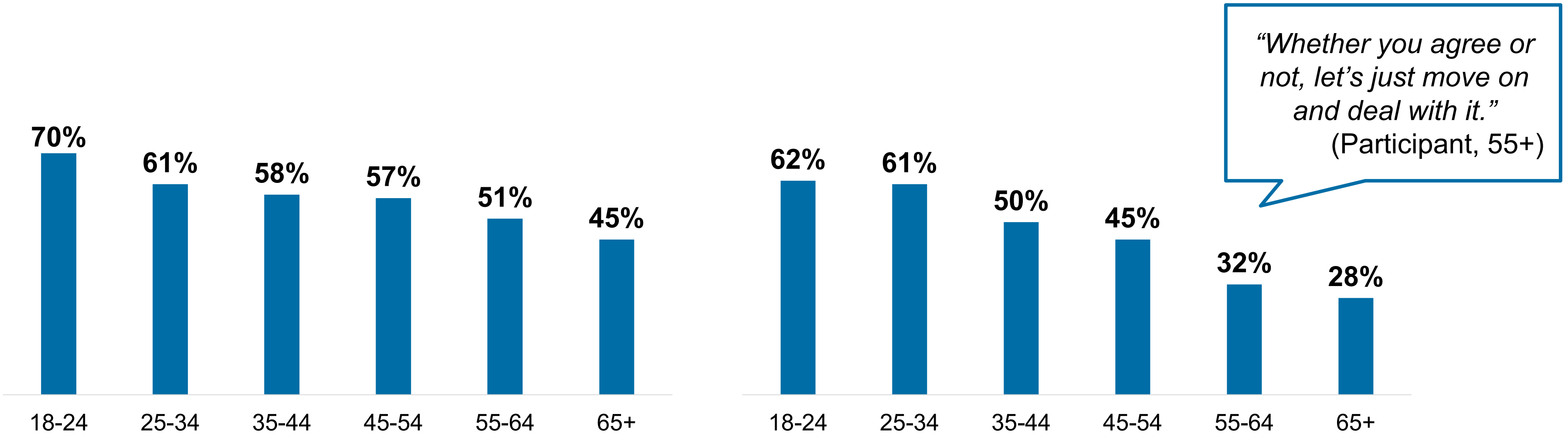


“At the end of the day we voted out. If we vote again we’ll be back to square one and have to start the negotiations all over again.”

(Participant, 18-30)

Q3: How likely or unlikely do you feel it is that each of the following will happen in 2018: Brexit negotiations will go well? Base: All respondents (n=2051)

Younger people are more likely to feel pessimistic about Brexit negotiations and also to welcome another vote



% Say it is unlikely that Brexit negotiations will go well in 2018

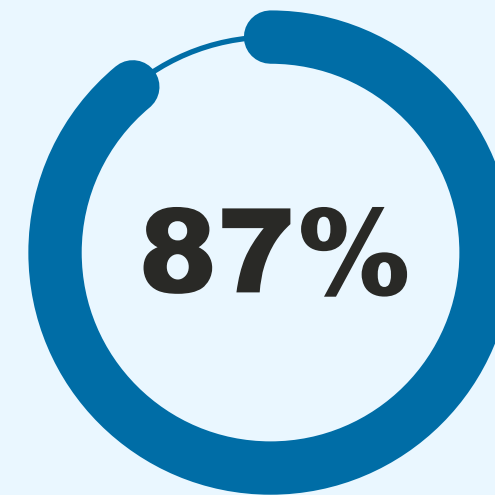
% Say people should have the right to think again about Brexit

Q3: How likely or unlikely do you feel it is that each of the following will happen in 2018: Brexit negotiations will go well? Base: All respondents (n=2051)

Q4: To what extent, if at all, do you agree or disagree with the following statement: People should have the right to think again about Brexit? Base: All respondents (n=2051)

The cost of living is expected to increase in 2018 – largely a consequence of Brexit uncertainty...

- Groups described already having felt prices increase over the last year
 - Seen as a consequence of Brexit that they expect to continue in 2018
- Weakness of the pound is also front of mind – and concerns from some about the impact this will have on business and, consequently, jobs
 - Will business be able to weather the change? Will they leave the UK?



Say it is likely that the cost of living will increase in 2018

“Every single year we’re more skint.”
(Participant, 18-30)

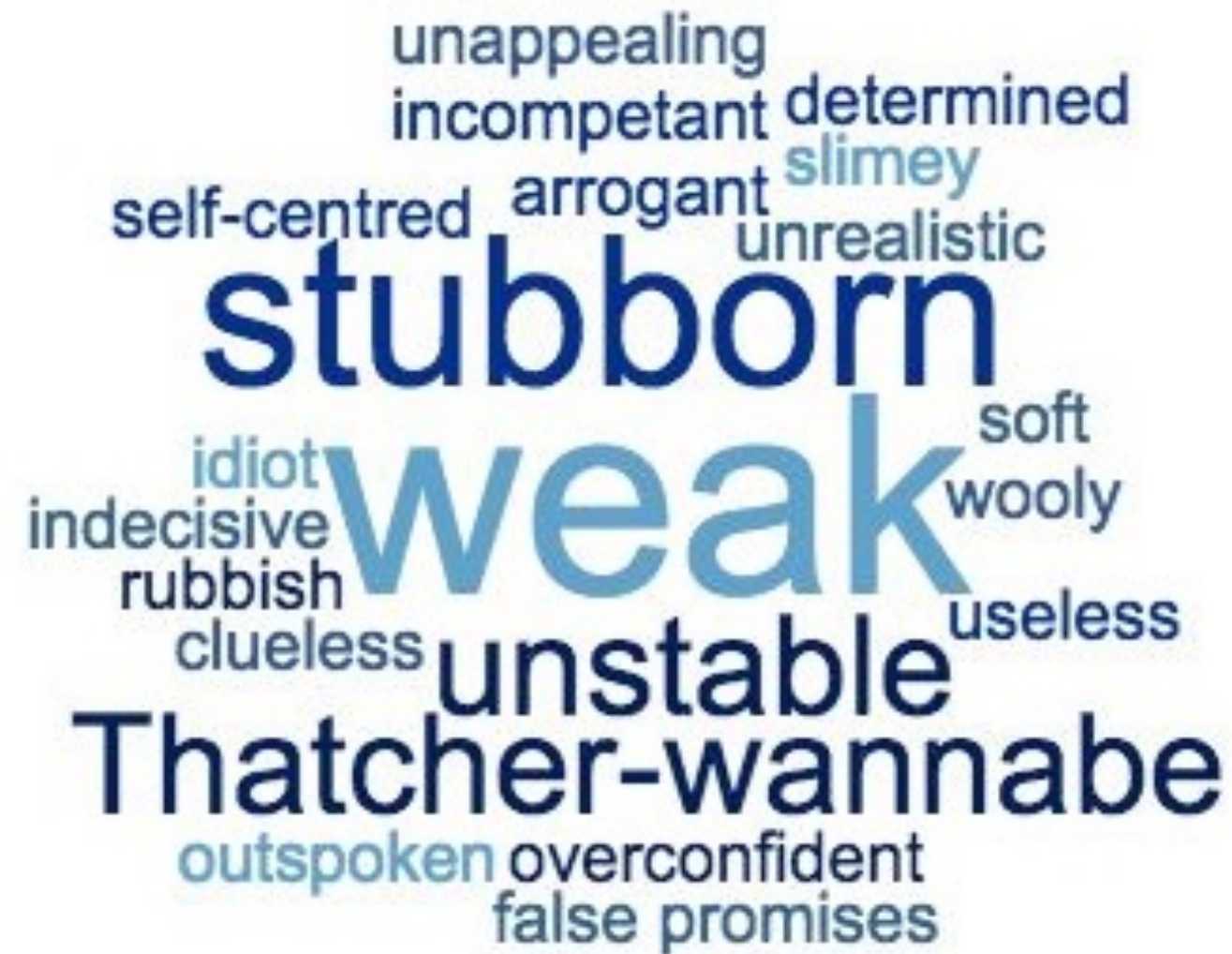
“It will be good for the economy in the end, it all takes time.”
(Participant, 55+)

...but with an expectation that after a few ‘difficult’ years, any economic impact of Brexit will have levelled out

Q3: How likely or unlikely do you feel it is that each of the following will happen in 2018: The cost of living will increase? Base: All respondents (n=2051)

04 Theresa May's reputation was devastated over 2017, and expectations are low for 2018

Theresa May is described as weak, unstable and stubborn - a 'Thatcher-wannabe' who lacks strength or a vision of her own



Q. What 3 words describe Theresa May?

If she was an animal...



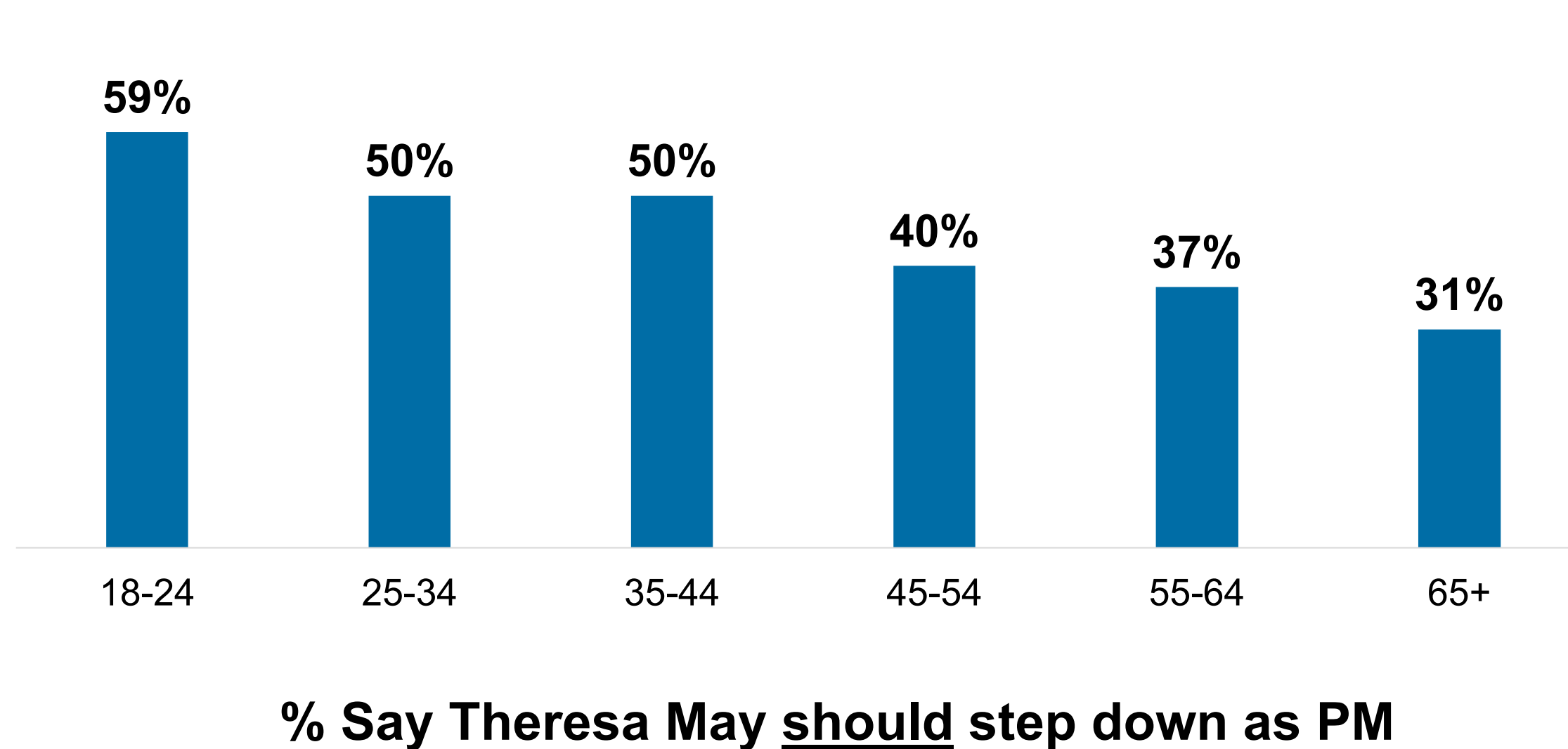
"An animal that is arrogant because she underestimated her opposition, and goats are stubborn too."
(Participant, 18-30)

If she was a drink...



"A shandy top – it's weak. There's a little bit of beer and a lot of fizz."
(Participant, 55+)

Almost a third (31%) are expecting May to resign this year, while 43% say she *should* step down as PM



“I think she’s too stubborn to step down. I don’t think she will go, she’s got too much pride.”
(Participant, 55+)

“I think it will just carry on as it is and she’ll get nothing done and in the end the pressure will get to her and she’ll just resign.”
(Participant, 18-30)

Q3: How likely or unlikely do you feel it is that each of the following will happen in 2018: Theresa May will resign? Base: All respondents (n=2051)

Q4. To what extent, if at all, do you agree or disagree with the following statement: Theresa May should step down as PM? Base: All respondents (n=2051)

05

Corbyn's strength derives in part from May's weakness but also because his heartland issues are rapidly rising up the agenda

Views of Corbyn are mixed – while he’s seen as strong, confident and grounded by some (and not just by young people), others describe him as naïve and untrustworthy



Q. What 3 words describe Jeremy Corbyn?

If he was an animal...



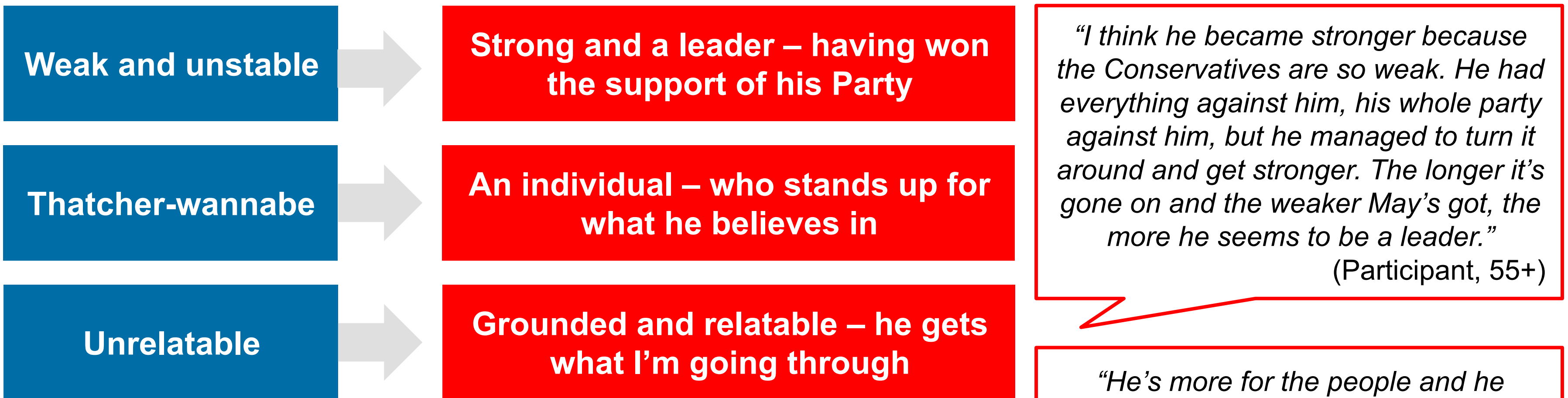
“People mistake koalas. They look cute but they’re vicious and strong and at the end of the day they get what they want.”
(Participant, 55+)

If he was a drink...



“He just seems like a normal bloke in a way, that you’d bump into in a pub and have a chat with. He takes the bus, he’s got his head screwed on and he know what people and the country are about.”
(Participant, 18-30)

Crucially, these successes are *relative* to Theresa May's very poor position and traditionally Labour issues rising up the agenda



- Issues he's expected to do well on are rising up the agenda
 - NHS scoring highest as an issue for 16 years, and housing at its highest since the '70s*

*IPSOS MORI Issues Index, December 2017

However, there was a strong sense of ‘none of the above’ from both of our groups

- There are anxieties about Corbyn’s ability to deliver – as a result of inexperience and overpromising
 - In particular, there is some scepticism from young people about his tuition fees policy, while older people saw this as a poorly-hidden bribe to win the younger vote
- And Theresa May’s reputation is much weaker than the reputation of the Conservative Party – suggesting that a new leader could change the dynamic considerably

“Rubbish. He’s trying to get the vote of the youngsters by saying that he will get rid of university fees and all the rest of it, but the country can’t afford it.”
(Participant, 55+)

“I think she’s losing them so many votes by being the leader.”
(Participant, 18-30)

Recap: the 5 most important things that we've learned

- 1.** The nation is feeling anxious about 2018 and the year ahead is characterised by uncertainty
- 2.** Younger people's outlook for 2018 is particularly bleak
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- 4.** Theresa May's reputation was devastated during 2017 and expectations are low for 2018
- 5.** Jeremy Corbyn's strength derives in part from May's weakness but also because his heartland issues are rapidly rising up the agenda

Thank you

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