

Public opinion and the mood of the nation

April 2023

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Welcome to the age of the polycrisis

*“A polycrisis is not just
a situation where you
face multiple crises.*

*It is a situation... where
the whole is even more
dangerous than the
sum of the parts”*

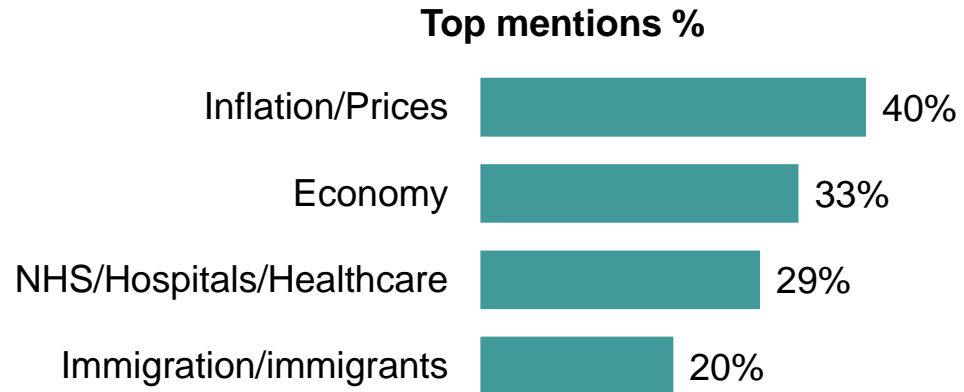
Adam Tooze

How are the public feeling?



Inflation, economy, NHS and immigration top the political agenda

What do you see as the most/other important issues facing Britain today?



Change since April 2022:

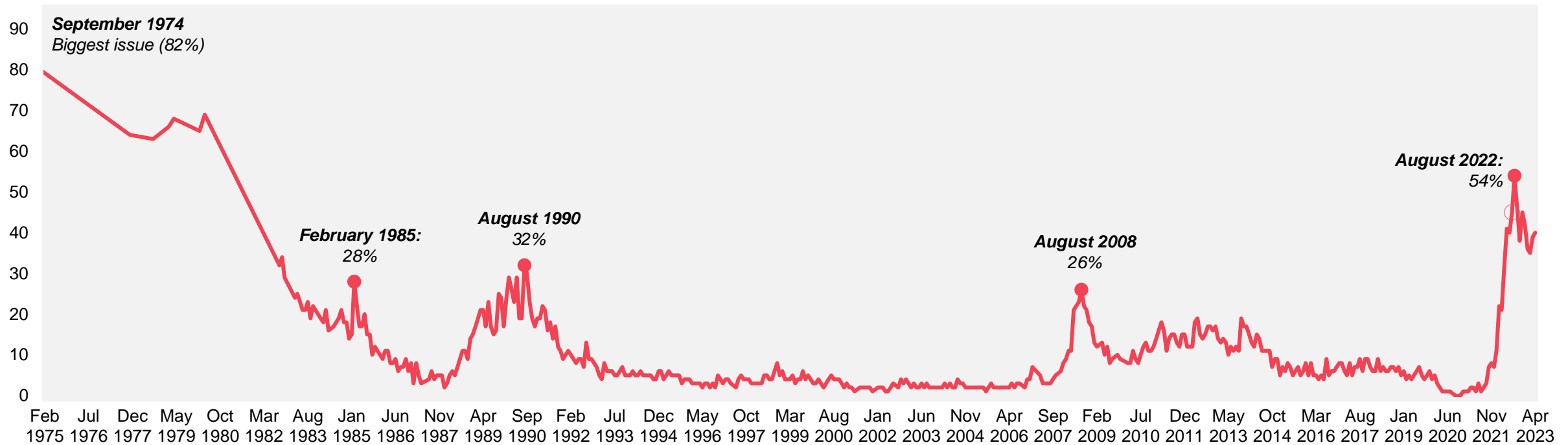


Base: 1,008 British adults 18+, 5 – 12 April 2023

Source: Ipsos Issues Index

Inflation/prices – concern since 1974

What do you see as the most/other important issues facing Britain today?

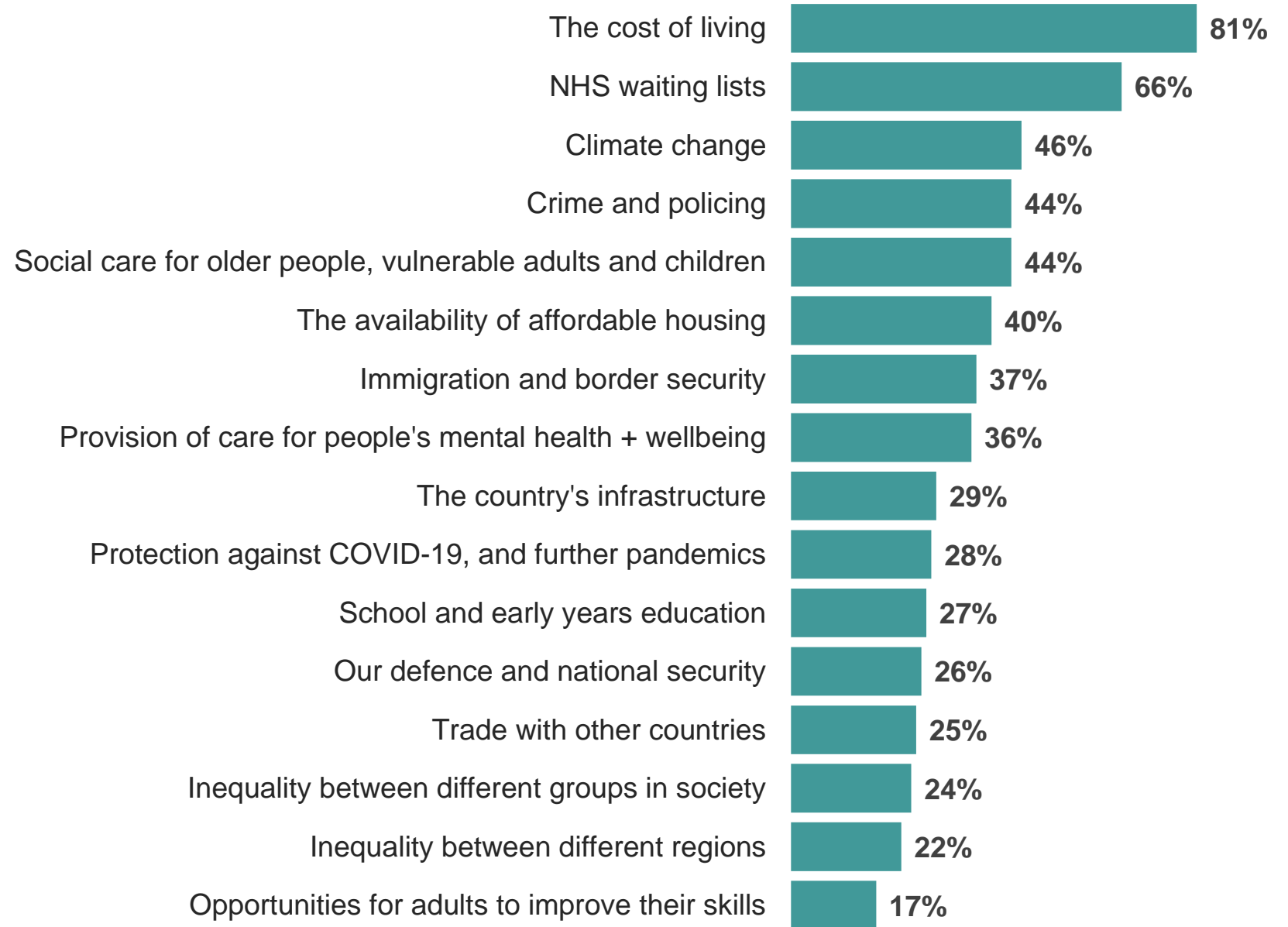


Base: representative sample of c. 1,000 British adults age 18+ each month, interviewed face-to-face in home
N.B. April 2020 data onwards is collected by telephone; previous months are face-to-face

Source: Ipsos Issues Index

Can see the whole range of the public's concerns even more when ask for their views of government priorities over the next few years

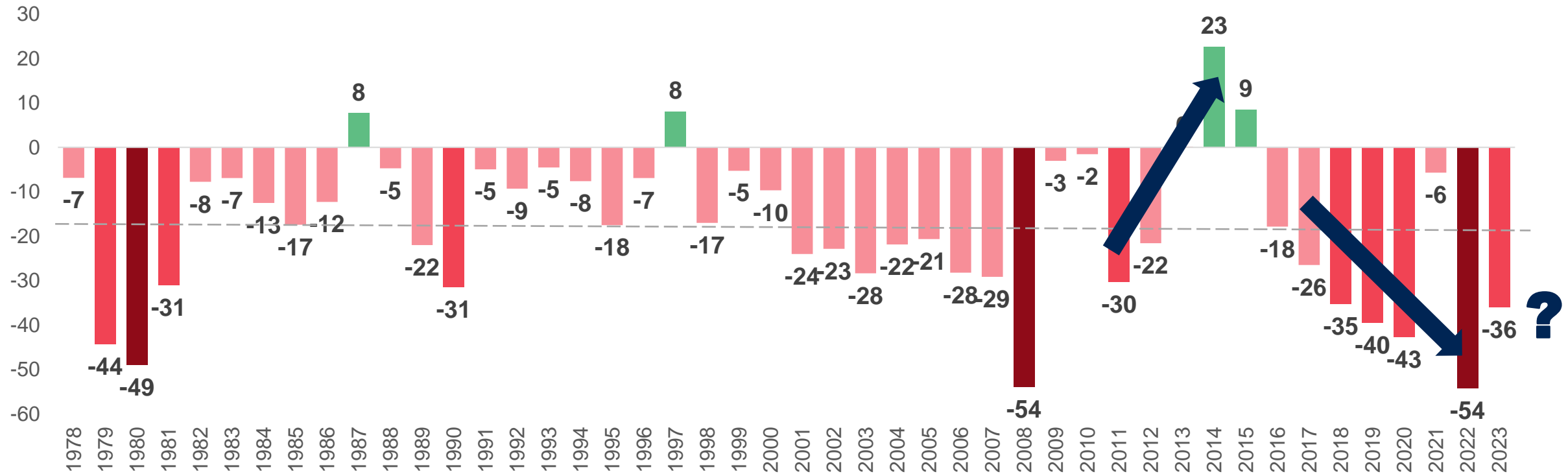
Which of the following issues, if any, do you think should be the top priorities for improvement in the UK over the next few years or so?



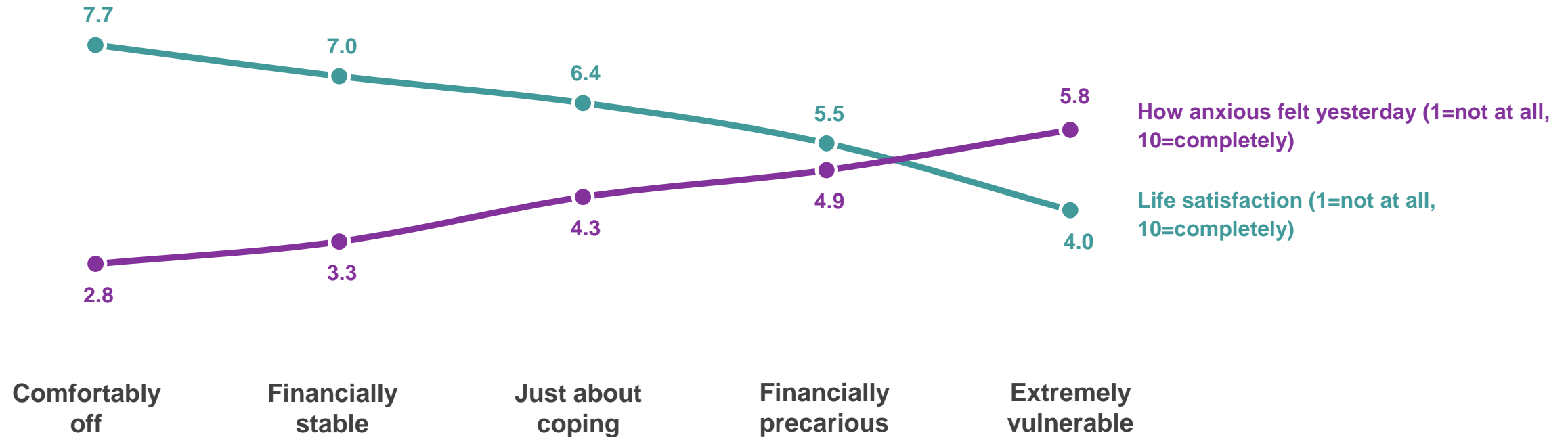
Base: 5,813 Online UK adults 16-75, 2nd-20th September 2022.

Economic optimism historically low (but getting off the floor....?)

Average yearly Ipsos Economic Optimism Index



Financial insecurity has a big impact on wellbeing: groups that are struggling more report lower levels of life satisfaction and higher levels of anxiety



Source: Ipsos UK Financial wellbeing tracker; 2-8 February 2023

Overall, how satisfied are you with your life nowadays? Overall, how anxious did you feel yesterday? Please can you give an answer on a scale of '0' to '10' where '0' is 'not at all' and '10' is 'completely'.

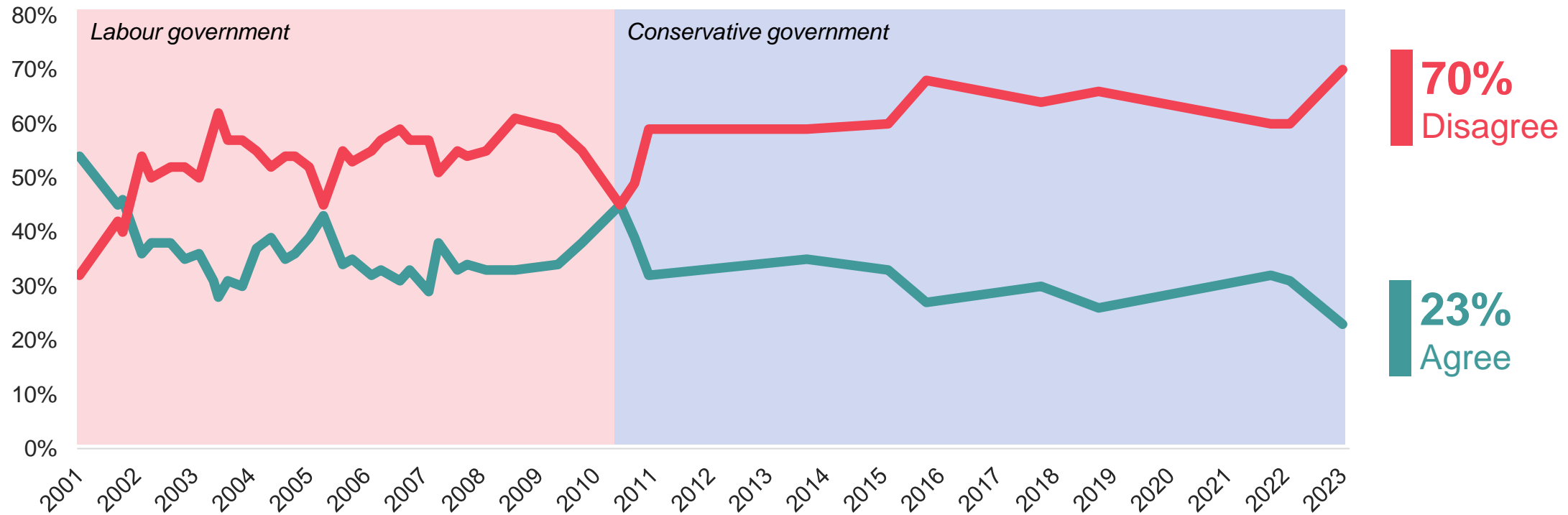
Base: Comfortably off (1,563); Financially stable (1,782); Just about coping (1,328); Financially precarious (940); Extremely vulnerable (350)

Economic concerns matched by real worries about public services

On balance, do you agree or disagree with the following statement.

“In the long term, this government's policies will improve the state of Britain's public services”

June 2001 – February 2023



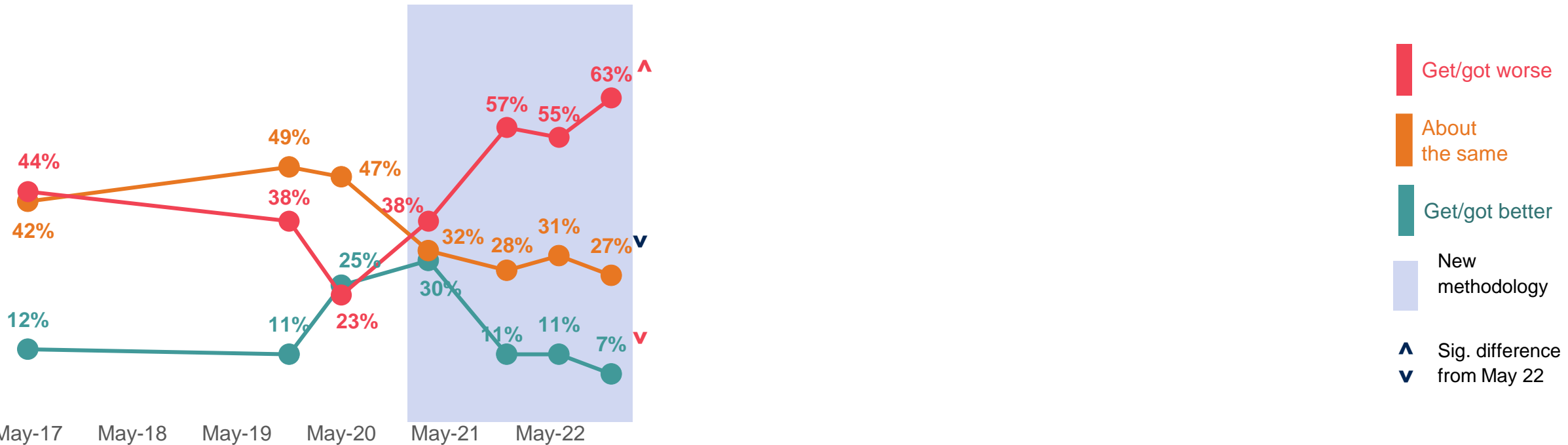
Base: 1,004 British adults 18+, 22 February – 1 March 2023

Source: Ipsos Political Monitor

Especially the NHS.....

The public are considerably more likely to think NHS services will get worse in the next 12 months in November 2022 (62%) than in May 2022 (39%).

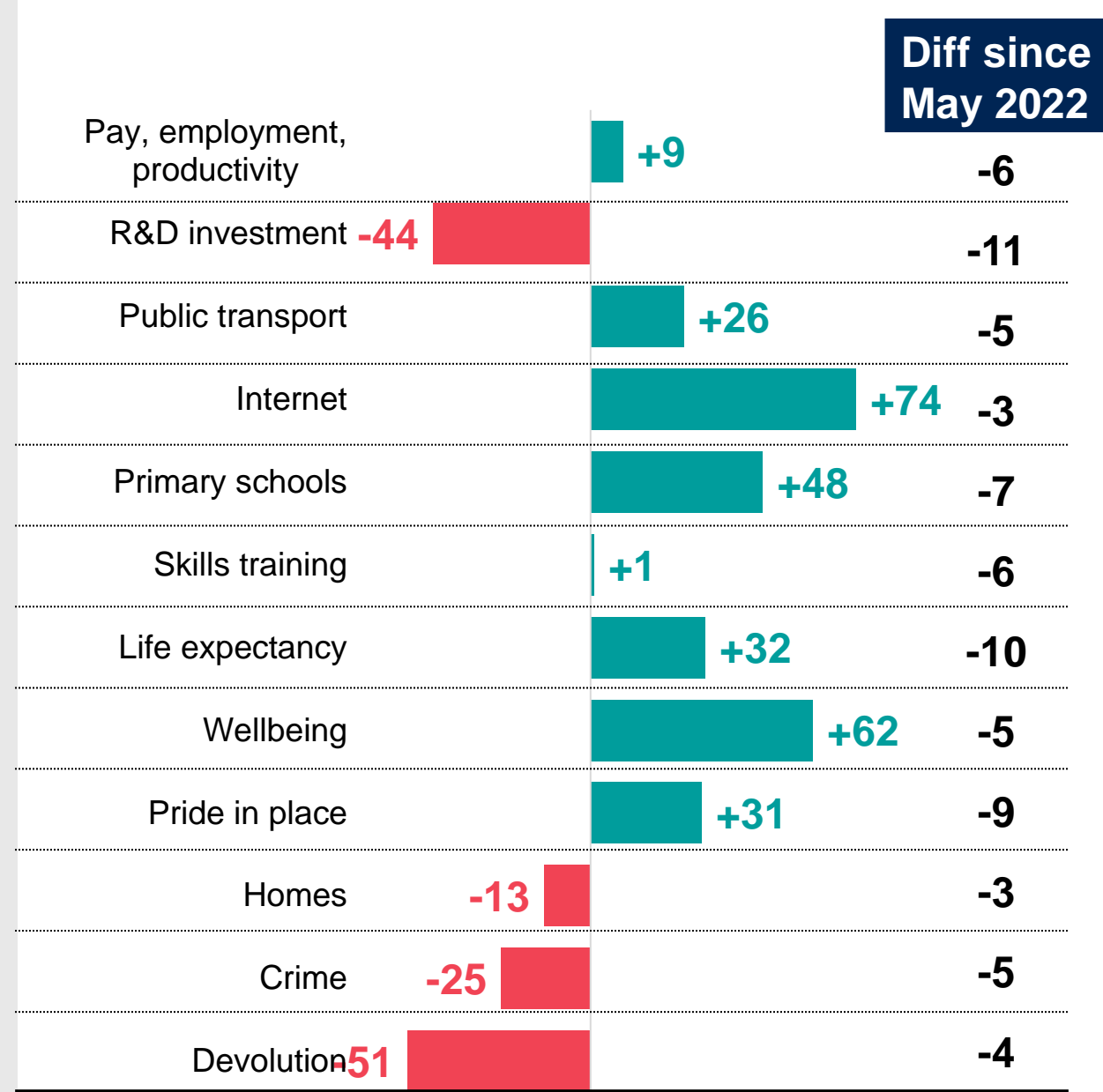
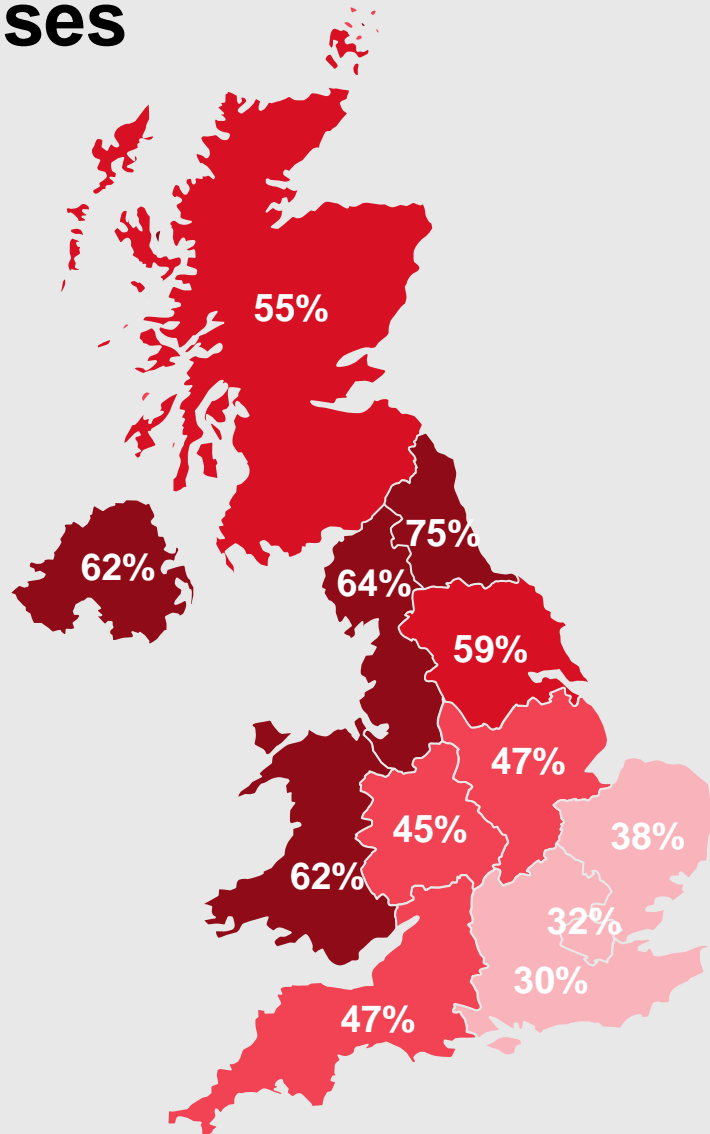
Do you think the general standard of care provided by the NHS over the last 12 months has...?



Bases: The Health Foundation surveys, "What does the NHS think about NHS and social care services" May 2017: 1,985* done via CAPI | "General Election 2019 polling" Nov 2019: 1,990* done via CAPI | "COVID-19 survey" May 2020: 1,983* done via telephone | KP survey, March 2021: 3,488 | Nov 2021: 2,102 | May 2022: 2,068 | Nov 2022: 2,063. * Please note that findings from May 2020 and before were collected using a different methodology and so comparisons should be treated with caution. Findings for March 2021, November 2021, May 2022, and November 2022 were collected using the same methodology and can be directly compared.

While perceptions of regional inequalities ('levelling-up') show little sign of improvement - and in some cases getting worse

% who think national government in Westminster spends less on their area than other local areas

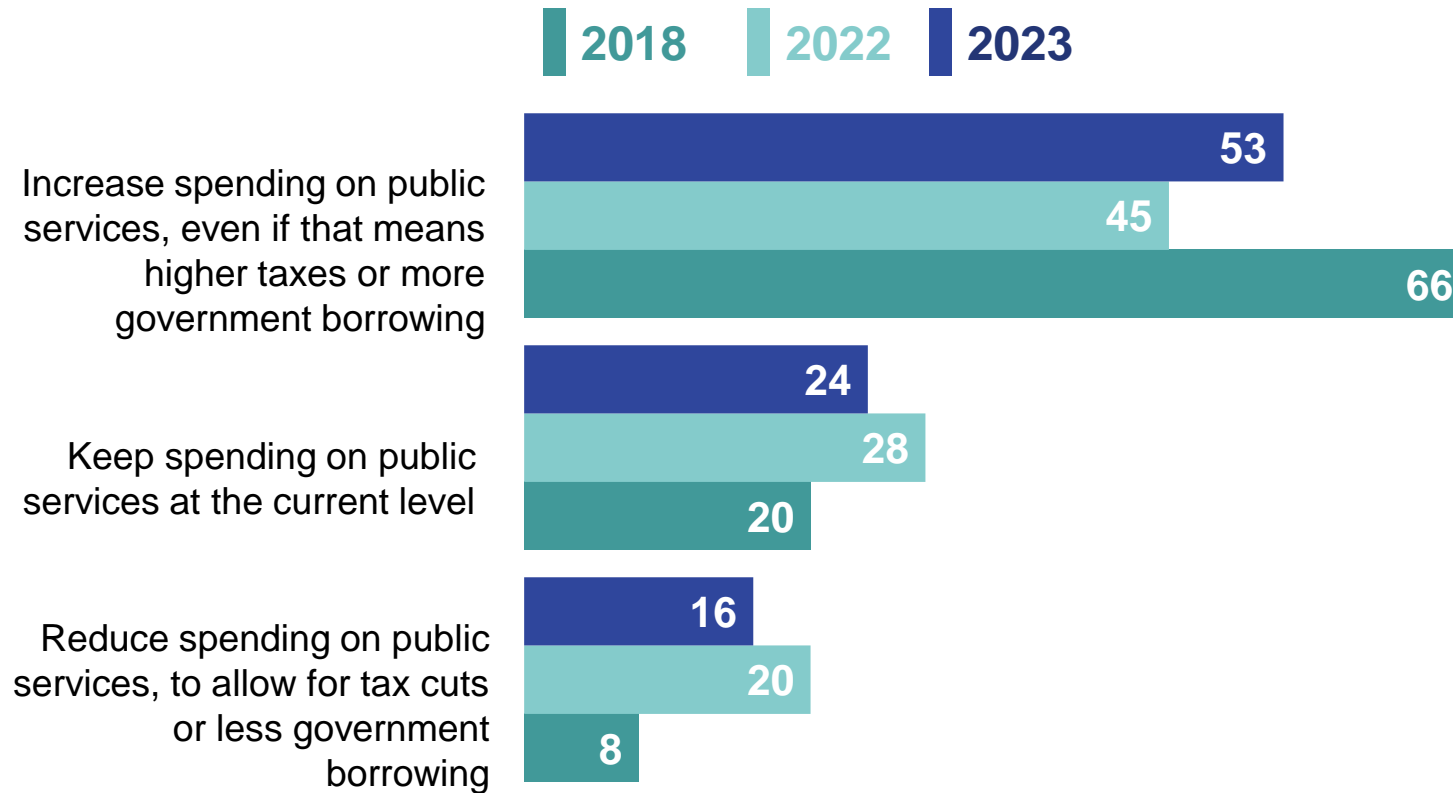


Base: All UK adults 16+ (6189) | Fieldwork dates: 2-8 February 2023

© Ipsos | Levelling Up Index | February 2023 | Version 1 | Internal/Client Use Only

No easy way out? Little appetite for austerity or tax rises....

Which of the following options, if any, do you think the government should do?



Base: 1,004 British adults 18+, 22 February – 1 March 2023

Most *opposed* policies pre-Autumn Statement:

- 70% council tax rise
- 64% VAT rise
- 54% limiting public sector pay rises to 2%
- 53% removing pensions triple lock
- 52% limiting growth in public sector spending to 1%

Base: 1,086 Online British adults aged 18-75, 11-14 November 2022

And local government is facing many drivers of uncertainty for the future – around the role of the state, digital, rising complexity and the nature of leadership

Productivity, pay, jobs and living standards

- Attracting and retaining in-demand skills
- Raising tomorrow's generation
- Matching physical and digital divides

Access to opportunity and public services

- Meeting customer expectations for all
- Urban ageing
- Loneliness and mental health
- Supporting mobility

Community, local pride and belonging

- Reinventing the high street
- Uniting digital and physical spaces and services
- Supporting communities in need of social care

Empowering local leaders and communities

- Local power generation
- What residents will want
- Future regulatory constraints

The political state of play

POLLING
STATION

WAY IN

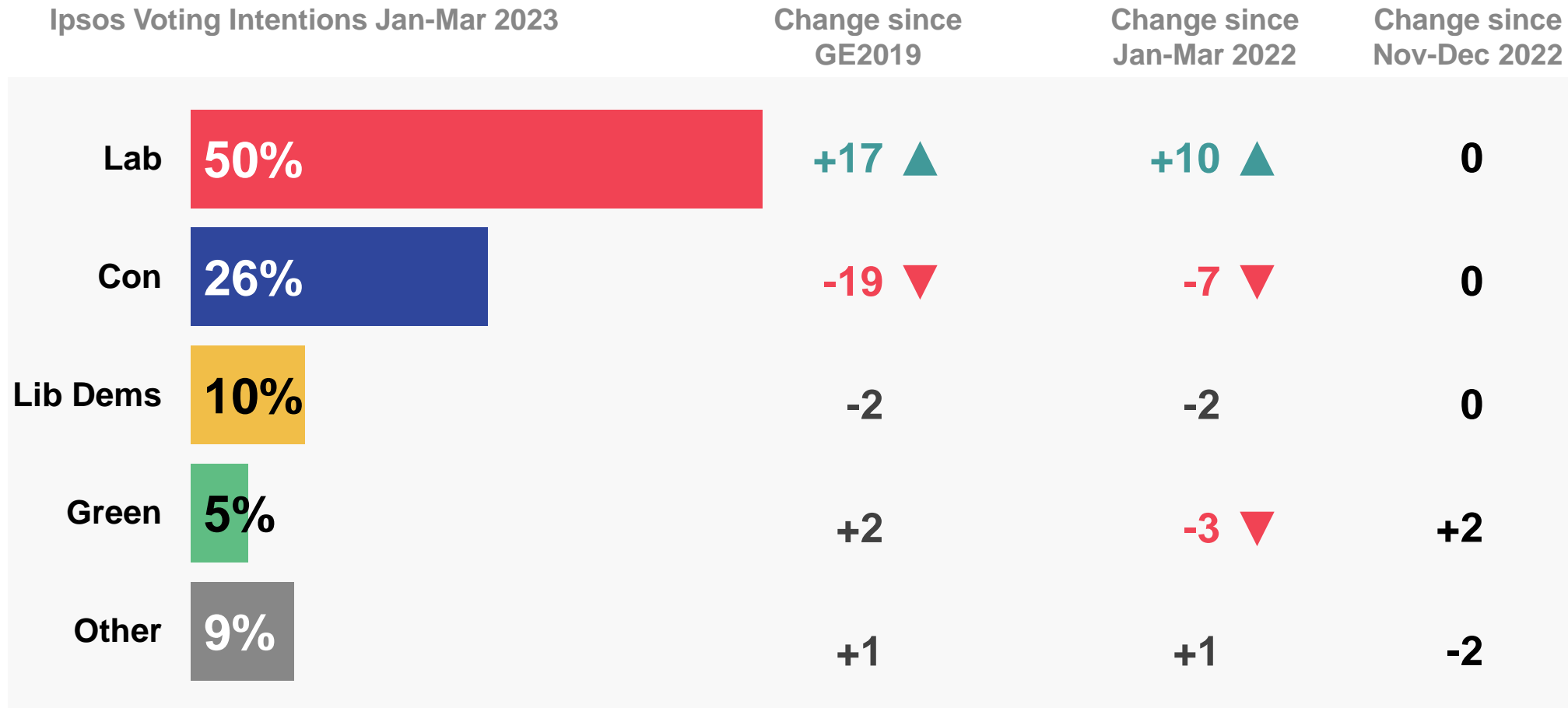
WAY IN

Three things to know about British politics

#1

Labour have a big lead. It wouldn't be surprise to see it narrow – but by how much?

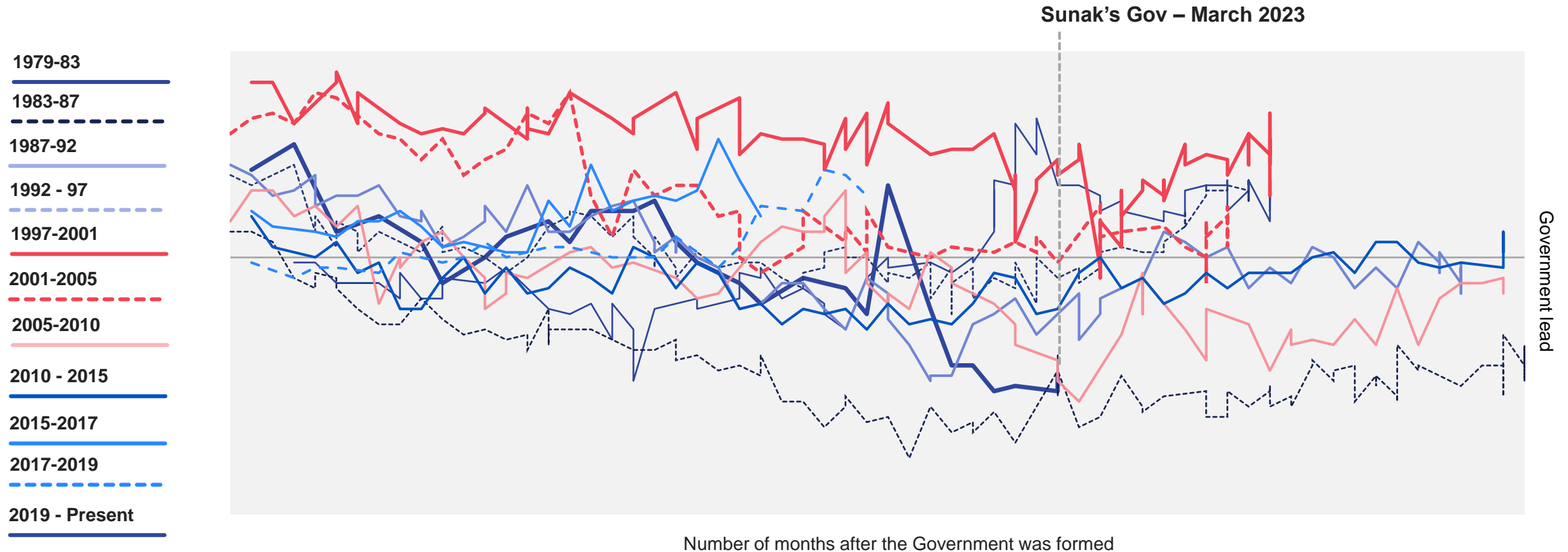
A year is a long time in politics....



Base: c3,000 British adults 18+, January-March 2023

How does this compare?

How do you intend to vote in the General Election? Will you vote...?

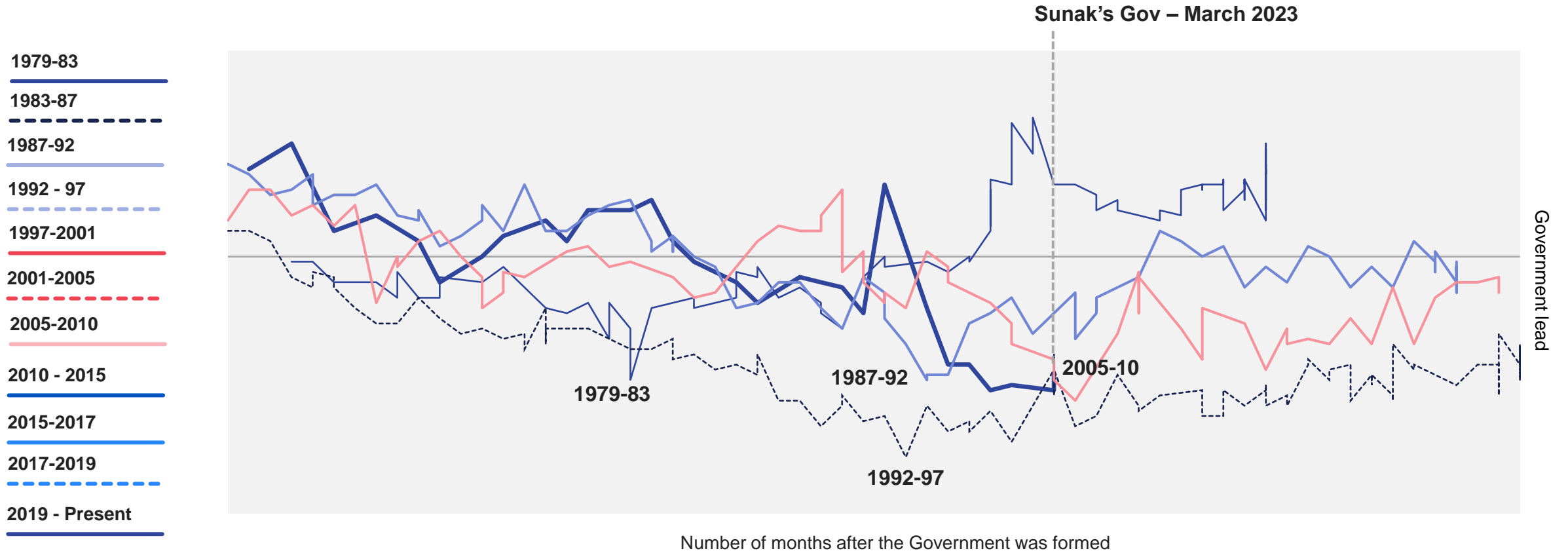


Note: Data collected prior to February 2008 was collected via face-to-face methodology; data collected from February 2008 was via telephone
Base: c.1,000 British adults each month

Source: Ipsos Political Monitor

How does this compare?

How do you intend to vote in the General Election? Will you vote...?



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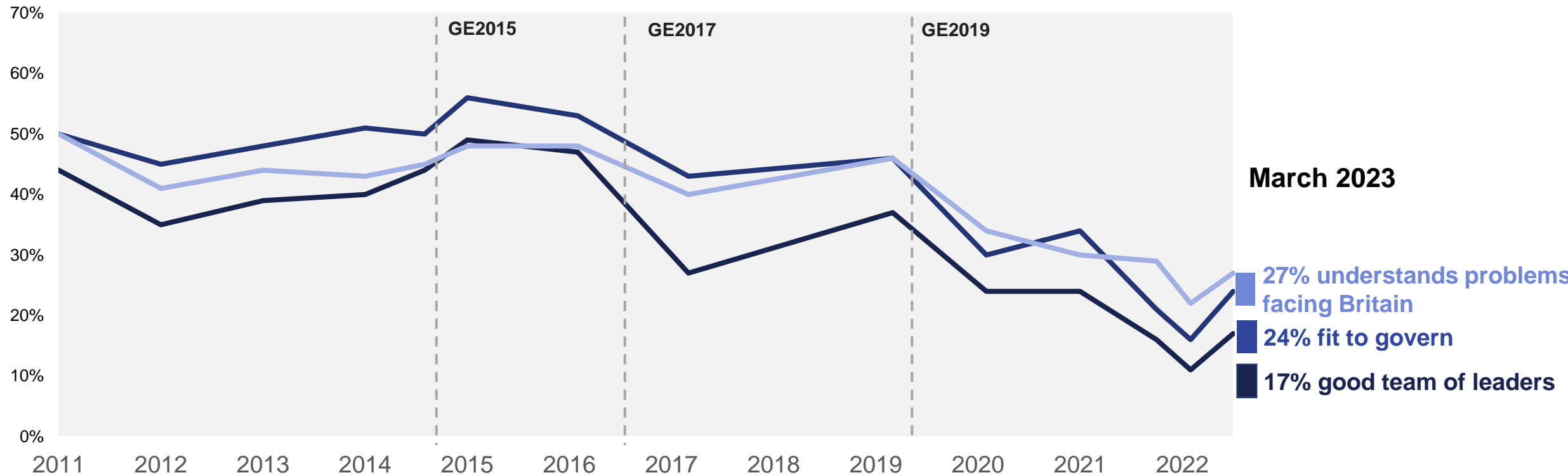
Labour have a big lead. It wouldn't be surprise to see it narrow – but by how much?

#2

The Conservative brand is in deep trouble – people think it's time for a change

The Conservatives' biggest problem is in their brand.....

I am now going to read out some things both favourable and unfavourable that have been said about various political parties. Which of these if any do you think apply to...?

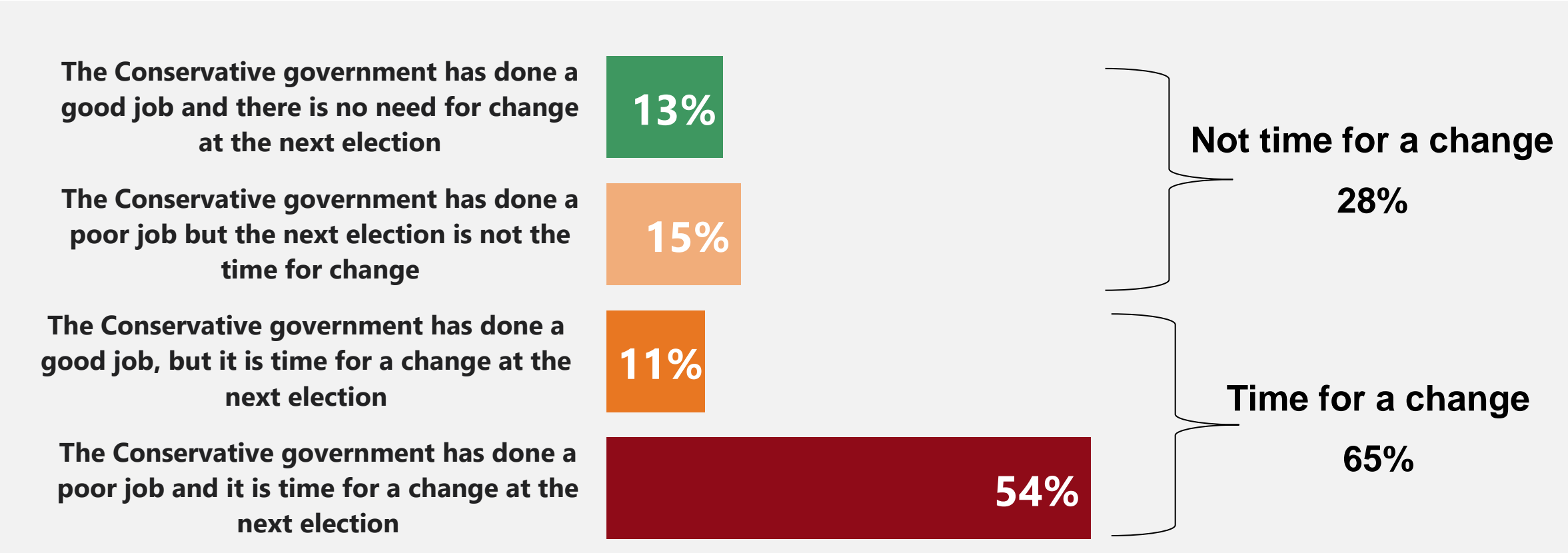


Latest wave base: 1,001 British adults 18+, 5th-12th October 2022. c.1000 people asked each wave.

Source: Ipsos Political Monitor

Is it time for a change at the next election?

Thinking about the outcome of the next General Election, which of the following, if any, comes closest to your view?



Base: 1,004 British adults 18+, 22 – 29 March 2023

Source: Ipsos MORI Political Monitor



Three things to know about British politics

#1

Labour have a big lead. It wouldn't be surprise to see it narrow – but by how much?

#2

The Conservative brand is in deep trouble – people think it's time for a change

#3

People aren't scared of Labour any more – but not much enthusiasm either

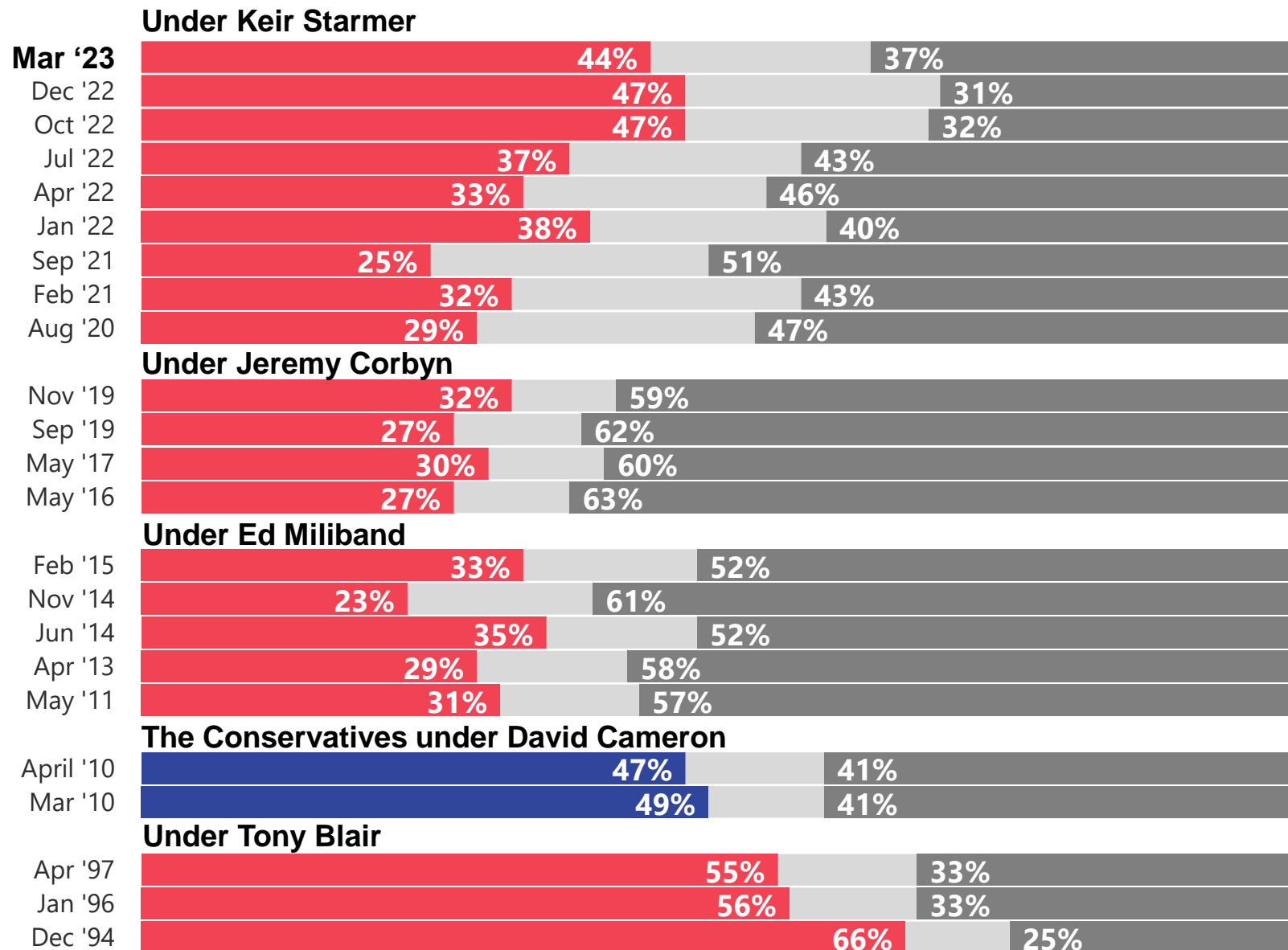
Biggest success is being seen as ready for government

To what extent, if at all, do you agree or disagree with the following?

Labour is ready to form the next Government

Agree

Disagree

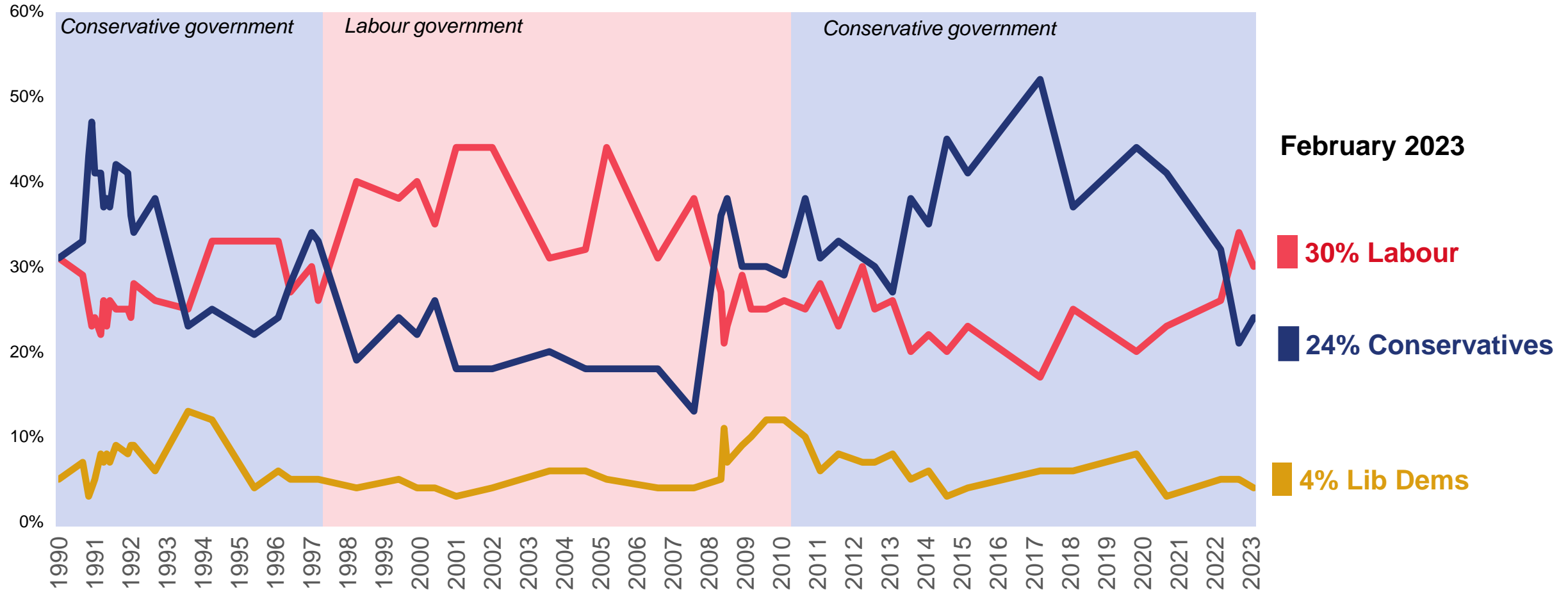


Base: 1,004 British adults 18+, 22 – 29 March 2023

Source: Ipsos Political Monitor

And they've taken a lead on the top issue

Which party do you think has the best policies on managing the economy, the Conservatives, Labour, Liberal Democrats or some other party?



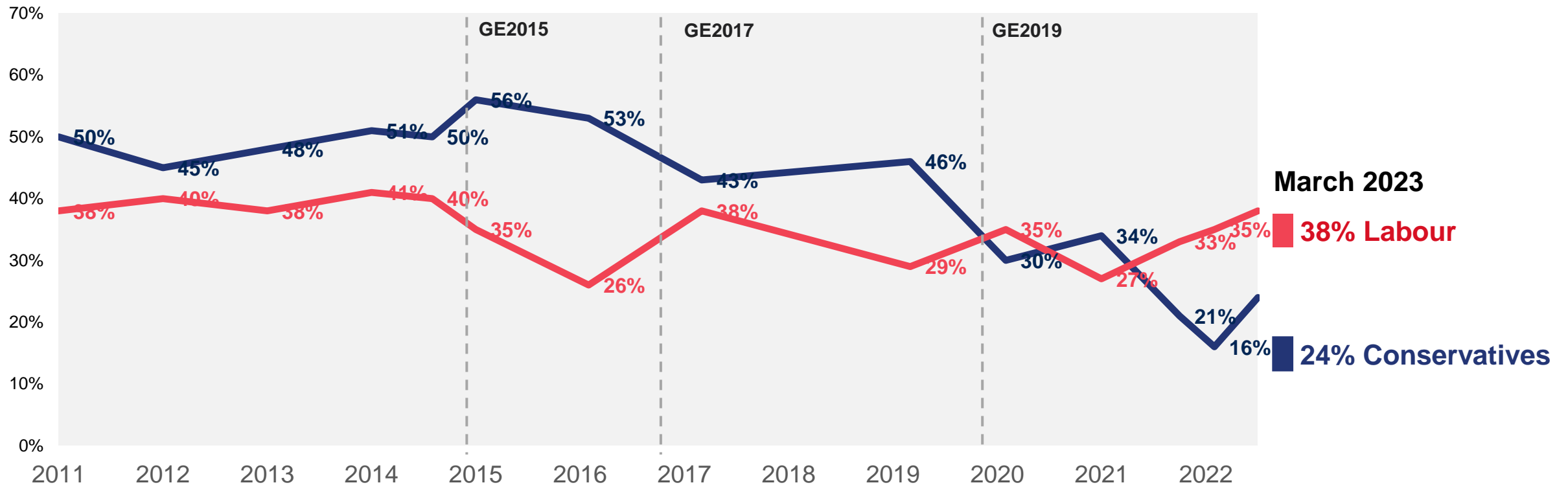
Base: 1,004 British adults 18+, 22 February – 1 March 2023. c.1000 people asked each wave.
Data collected prior to February 2008 was collected via face-to-face methodology; data collected from February 2008 was via telephone

Source: Ipsos Political Monitor

But still some questions on how much is due to Labour strengths and how much due to Conservative weakness?

I am now going to read out some things both favourable and unfavourable that have been said about various political parties. Which of these if any do you think apply to...? Fit to govern

% Describing ... as “fit to govern”, 2011-2023

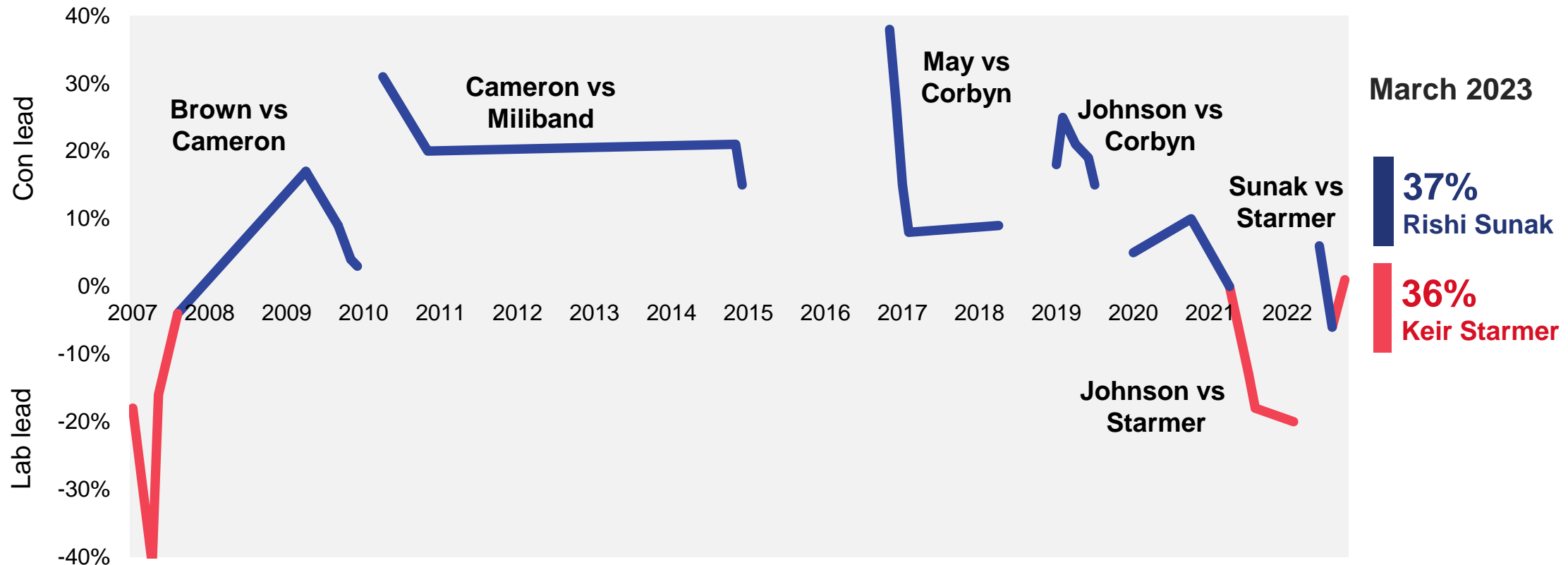


Latest wave base: 1,004 British adults 18+, 22 – 29 March 2023. c.1000 people asked each wave.

Source: Ipsos Political Monitor

Who would make the most capable Prime Minister?

Who do you think would make the most capable Prime Minister, the Conservative's Rishi Sunak, or Labour's Keir Starmer?



Base: c.1,000 British adults each month

Source: Ipsos Political Monitor

Final thoughts...

1

The mood of the nation is pretty low

Multiple crises have contributed to the current negative outlook – economy, public services, environment, war.....

2

Cost of living a key concern

The public is not used to prolonged levels of high inflation, and a persistent group are particularly vulnerable. Though some green shoots?

3

Politically no doubt that Labour have the advantage and the Conservative brand is badly damaged.

But Labour haven't yet sealed the deal.

And what if...

The worst doesn't happen, all of the time?

UK energy bills to fall to about £2,200 from July as wholesale gas costs drop

Mild weather in Europe reduces gas demand but bills will remain higher than 2021 energy price cap

UK inflation [+ Add to myFT](#)

UK inflation falls for second consecutive month as fuel prices ease

Decline to 10.5% in December despite jump in food costs

Goldman No Longer Sees Euro-Area Recession as It Lifts Outlook

- Region's economy is now expected to expand 0.6% in 2023
- ECB still predicted to raise deposit rate to 3.25% by May

EUROPE ECONOMY

UK narrowly avoids recession in back half of 2022 despite December slump

PUBLISHED FRI, FEB 10 2023-2:13 AM EST | UPDATED FRI, FEB 10 2023-2:47 AM EST

Elliot Smith
@ELLIOTSMITHCNBC

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DAVOS WEF

IMF chief: Growth will bottom out in 2023 and bounce back next year

PUBLISHED TUE, JAN 17 2023-3:26 AM EST | UPDATED TUE, JAN 17 2023-6:20 AM EST

Hannah Ward-Glenton
@HANNAHSWG

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3 minute read · February 15, 2023 5:36 PM GMT · Last Updated 6 days ago

Slowdown in UK inflation eases pressure on Bank of England

By Andy Bruce and William Schomberg

Thank you. Any questions?

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