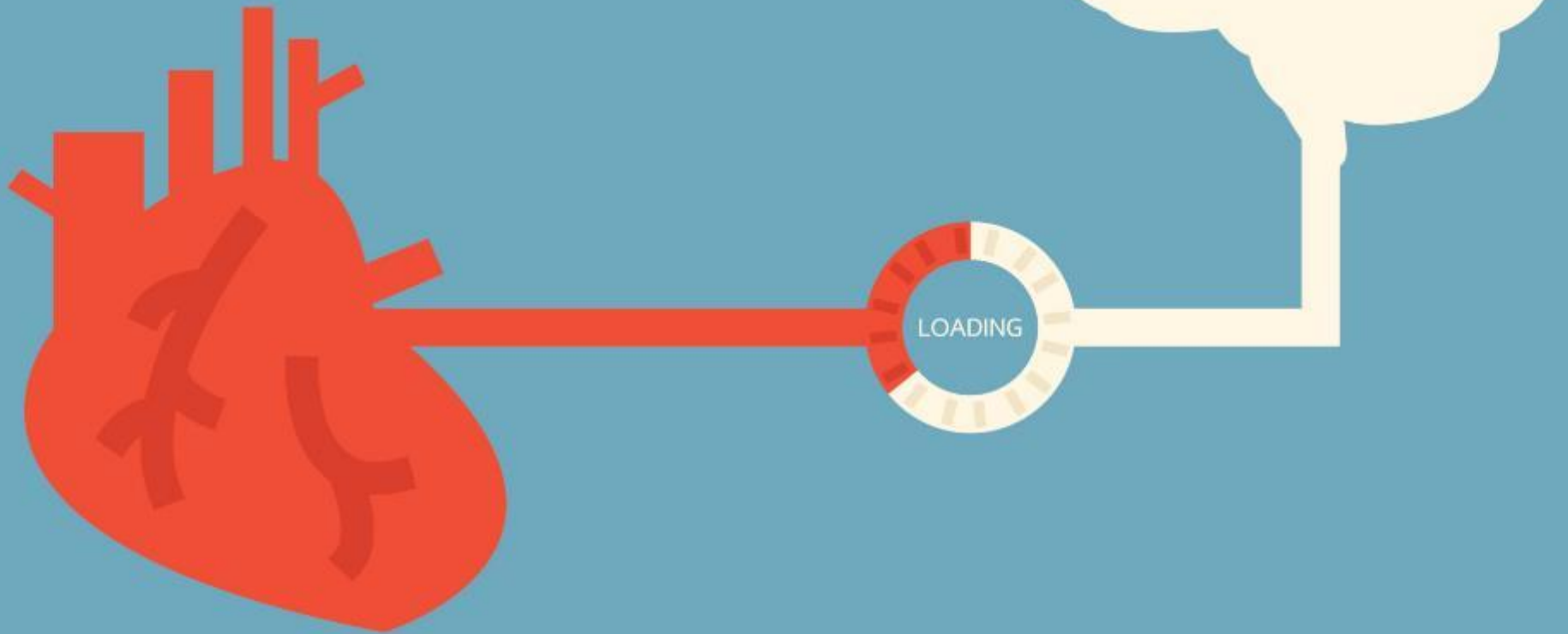


The public mood

An Ipsos MORI briefing

September 2016



We will cover Britons' top priorities:

Brexit

Immigration

Public services

The NHS

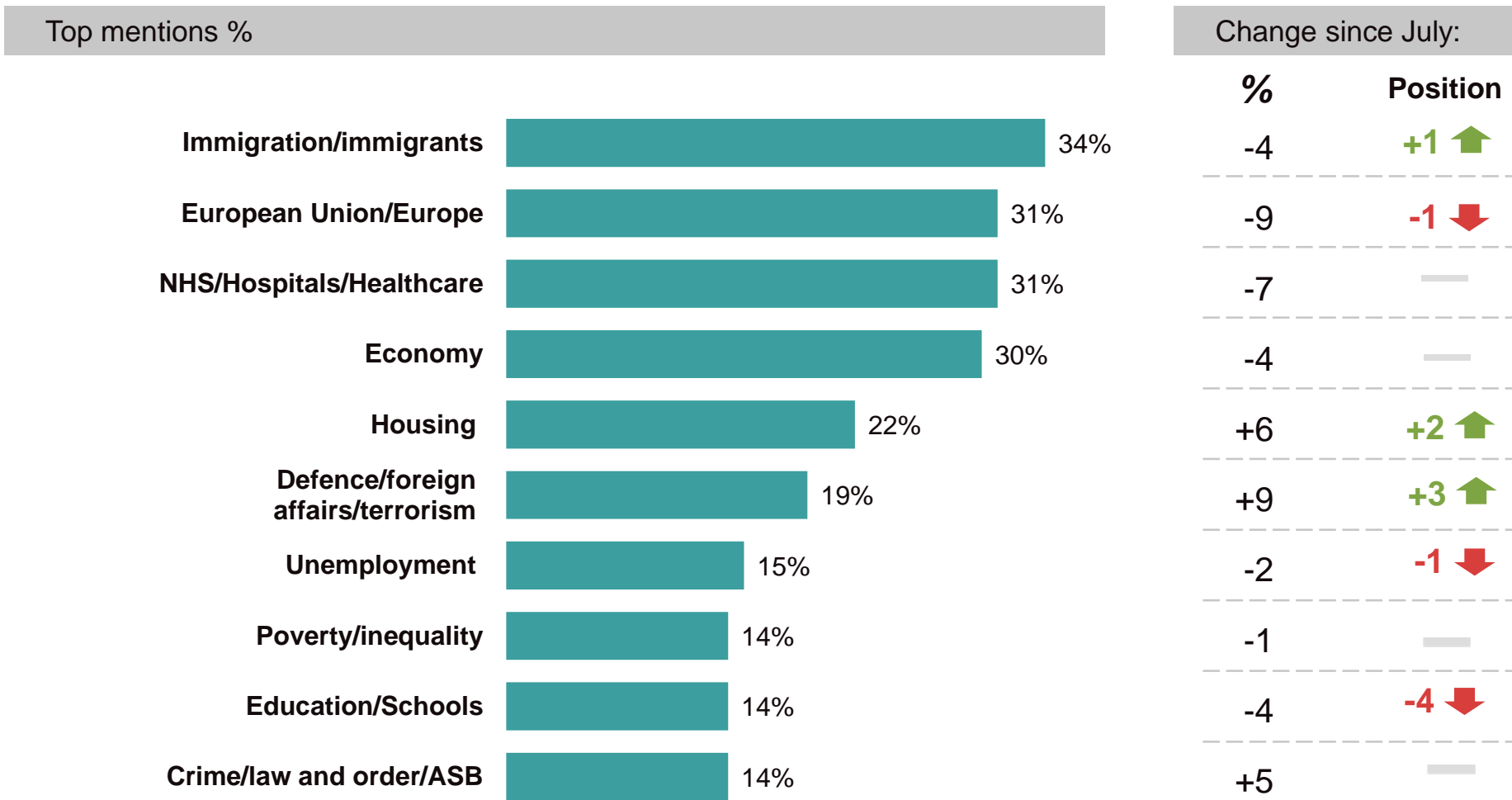
The economy and infrastructure

Social mobility and housing

Changing social values

Britons' top concerns: Immigration, EU, NHS, the economy and housing

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

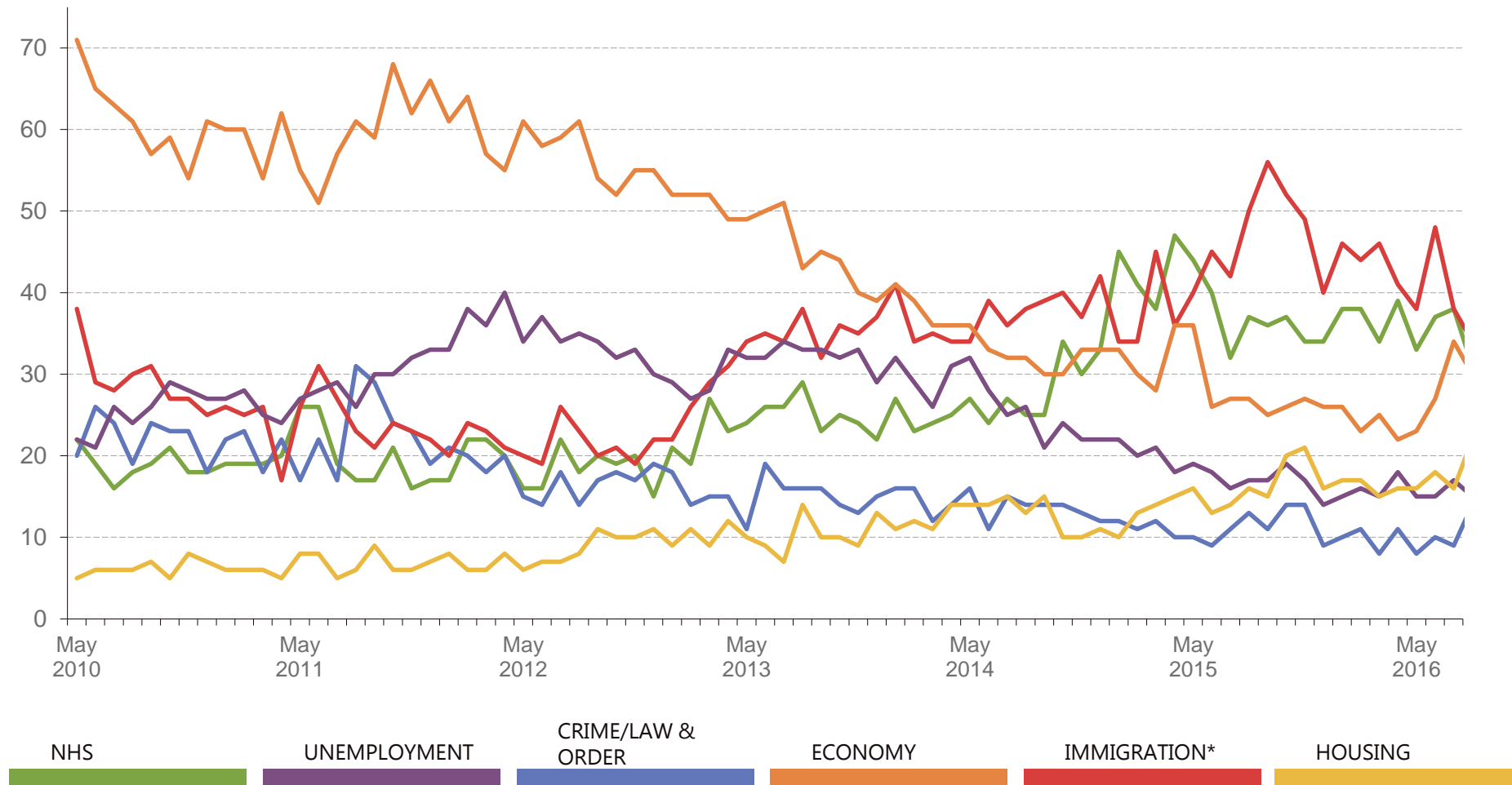


Base: 983 British adults 18+, 1st and 11th August 2016

Source: Ipsos MORI Issues Index

Since 2010 concern about economy, unemployment and crime down; immigration, NHS, housing more important

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

Source: Ipsos MORI Issues Index

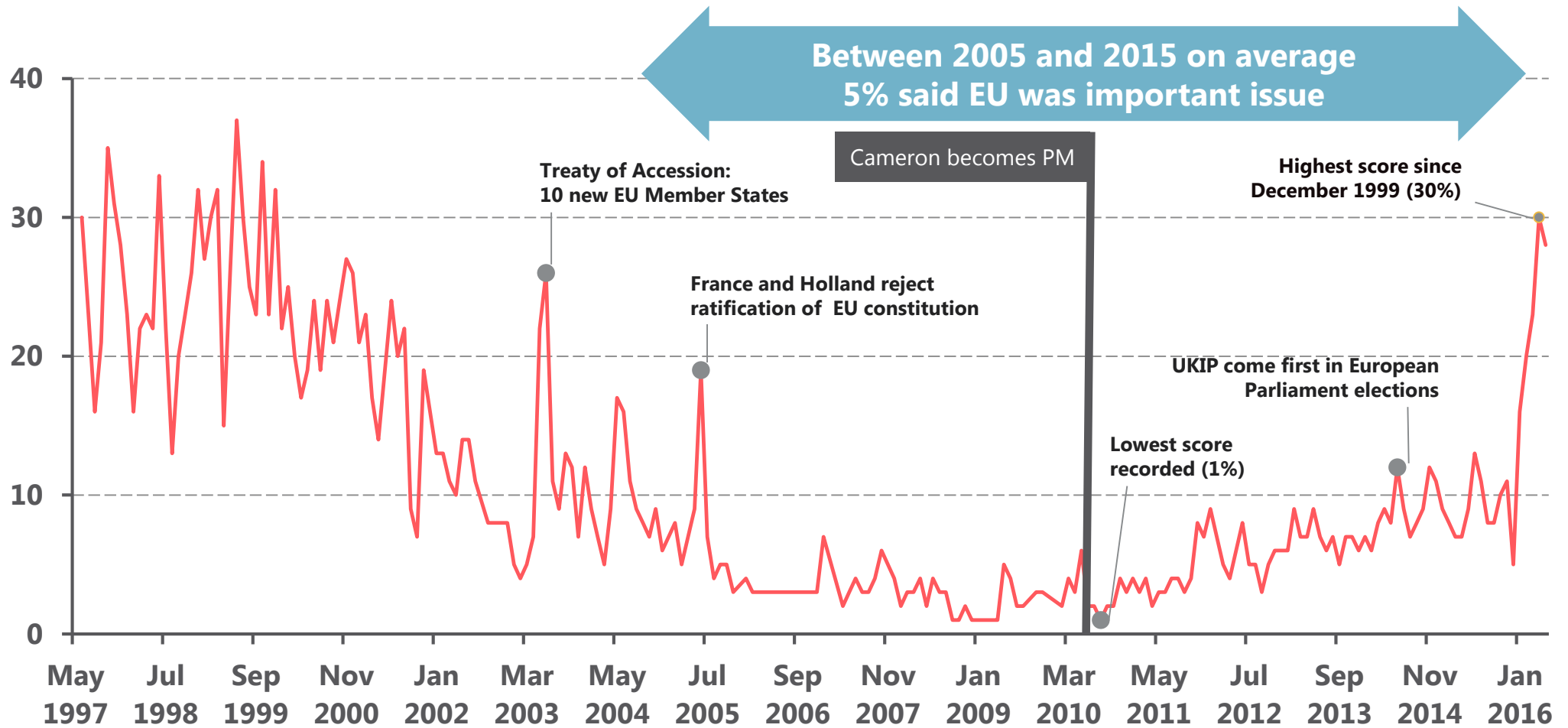
**So what does the public
think on those key
concerns?**

Post-Brexit...



We were never very enthusiastic Europeans

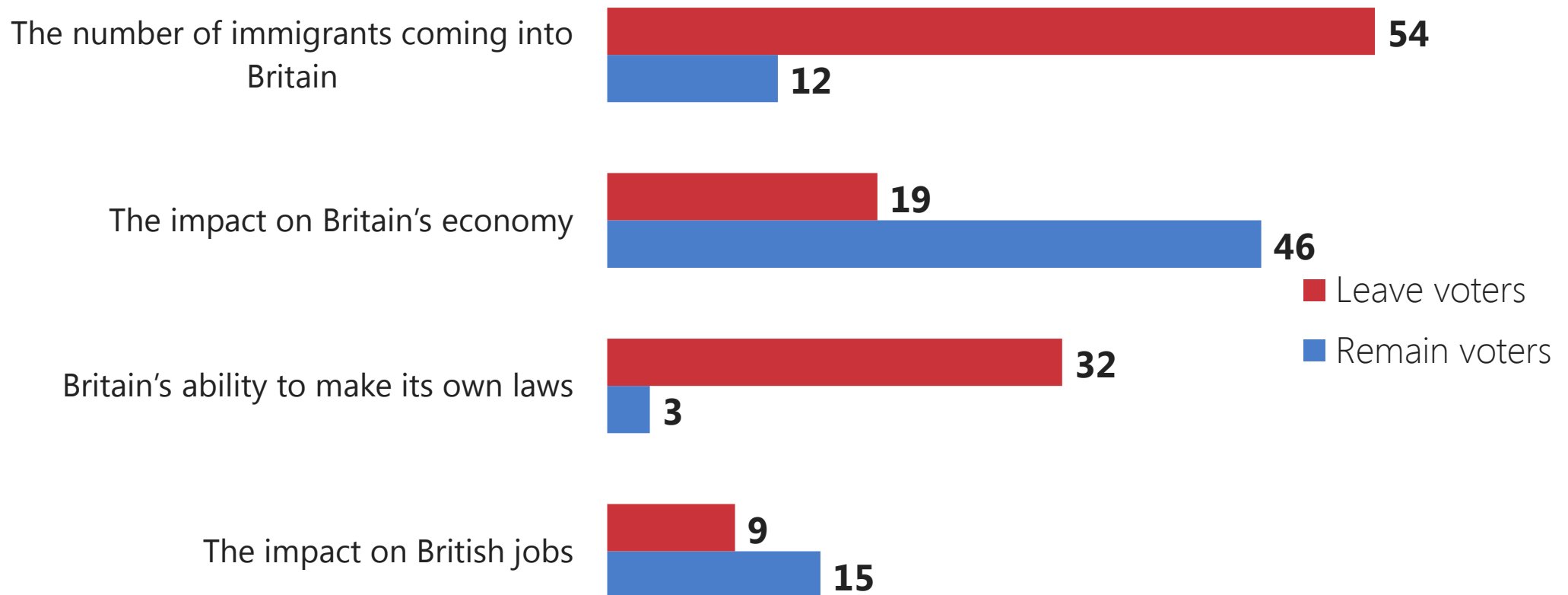
What do you see as the most/other important issues facing Britain today?



Leave supporters were motivated by immigration and sovereignty

LOOKING AHEAD TO THE REFERENDUM ON BRITAIN'S MEMBERSHIP OF THE EUROPEAN UNION ON JUNE 23RD, WHICH, IF ANY, ISSUES DO YOU THINK WILL BE VERY IMPORTANT TO YOU IN HELPING YOU DECIDE WHICH WAY TO VOTE? AND WHICH OF THESE ISSUES, IF ANY, THAT YOU MENTIONED IS THE MOST IMPORTANT TO YOU IN HELPING YOU DECIDE WHICH WAY TO VOTE?

Unprompted % – top responses only

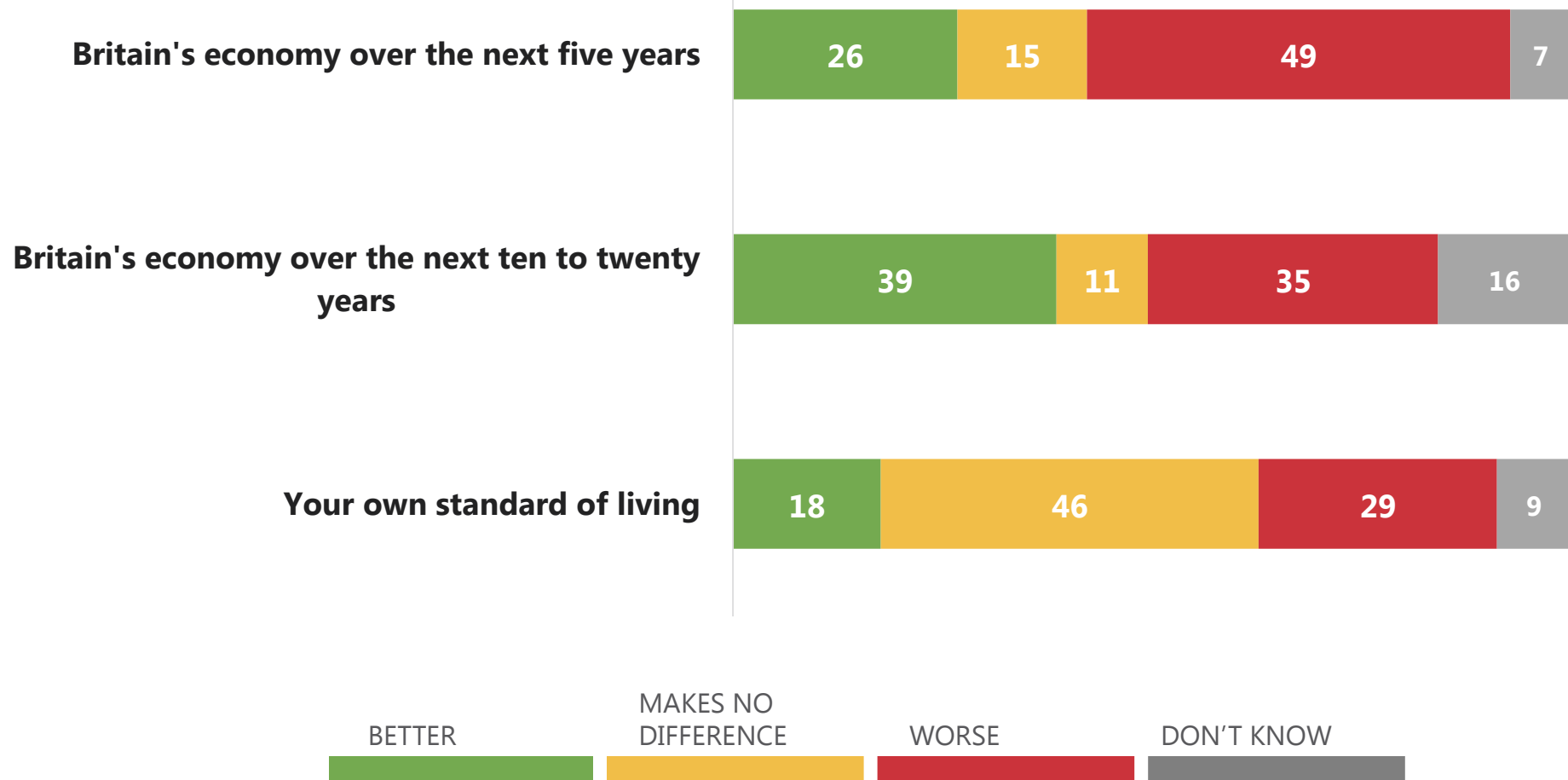


Base: 1,592 British adults 18+, 21st – 22nd June 2016

Source: Ipsos MORI Political Monitor

And the argument about long-term and personal economic impact was far from won anyway

IF BRITAIN VOTES TO LEAVE THE EUROPEAN UNION, TO WHAT EXTENT DO YOU THINK IT WOULD BE BETTER OR WORSE FOR EACH OF THE FOLLOWING, OR WOULD IT MAKE NO DIFFERENCE?



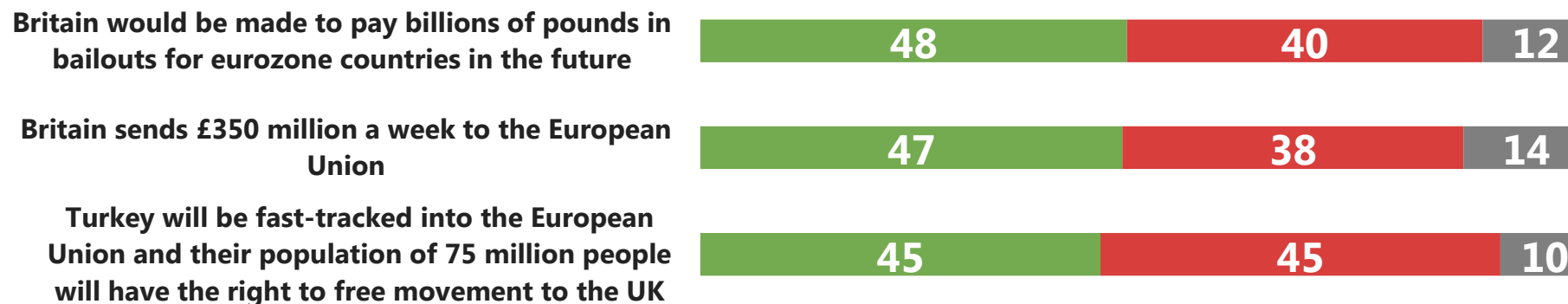
Base: 1,002 British adults, aged 18+, 14th – 16th May 2016

Source: Ipsos MORI Political Monitor

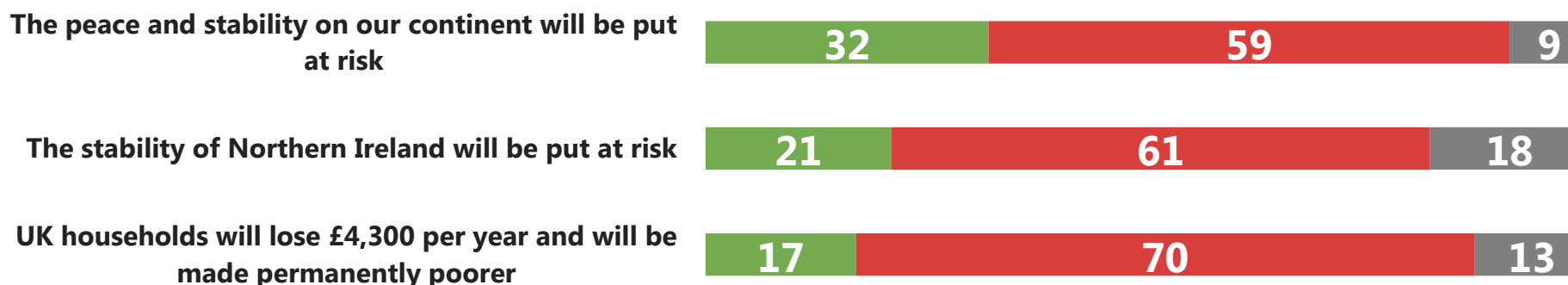
Leave campaign messages were more believed

DO YOU THINK EACH OF THE FOLLOWING IS TRUE OR FALSE ABOUT WHAT WOULD HAPPEN IF BRITAIN VOTES TO LEAVE/REMAIN WITHIN THE EU?

If Britain votes to remain...



If Britain votes to leave...

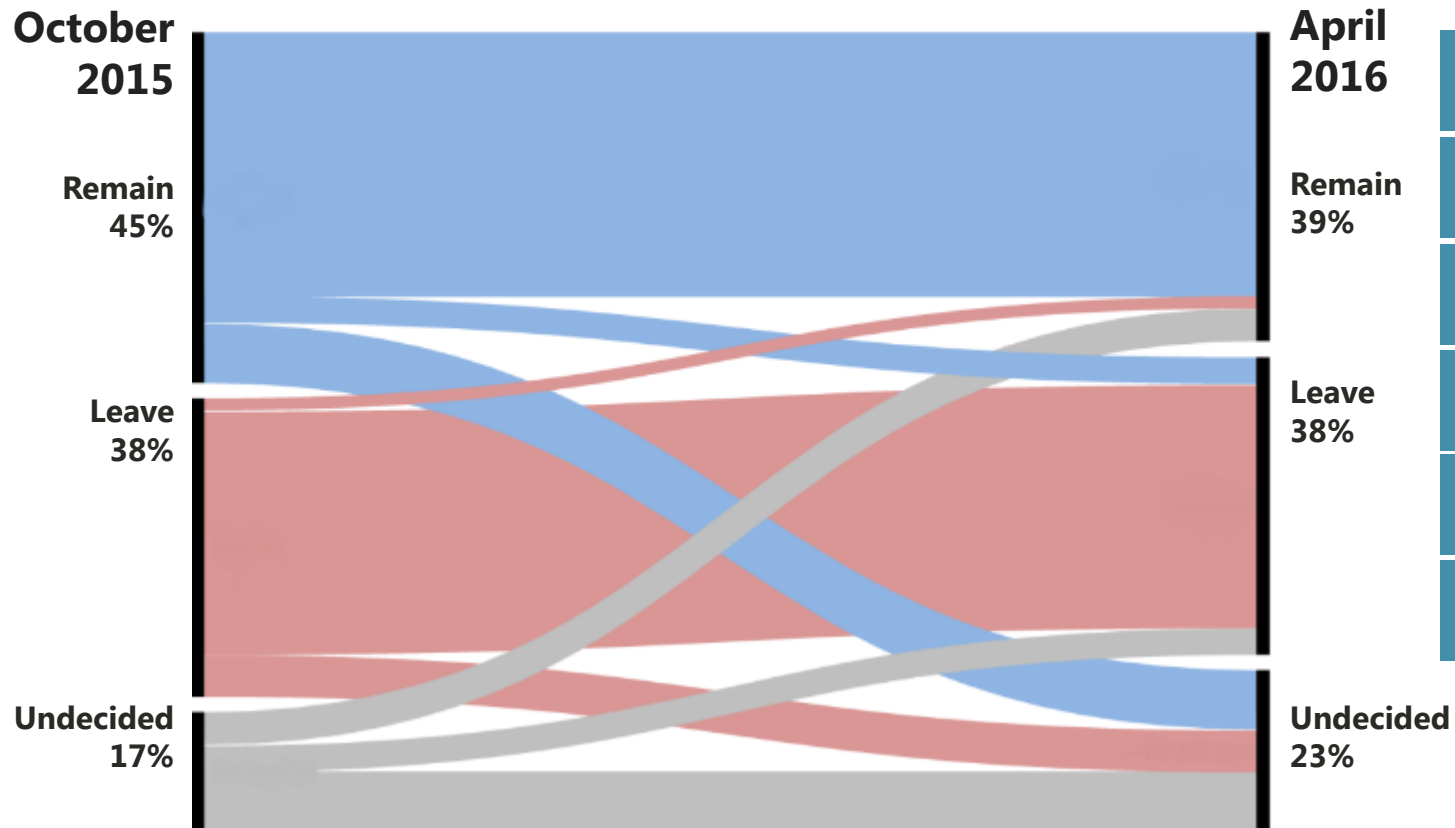


Base: 1,257 British adults 18+ 11th – 14th June 2016

Source: Ipsos MORI Political Monitor

Remain supporters were more flaky

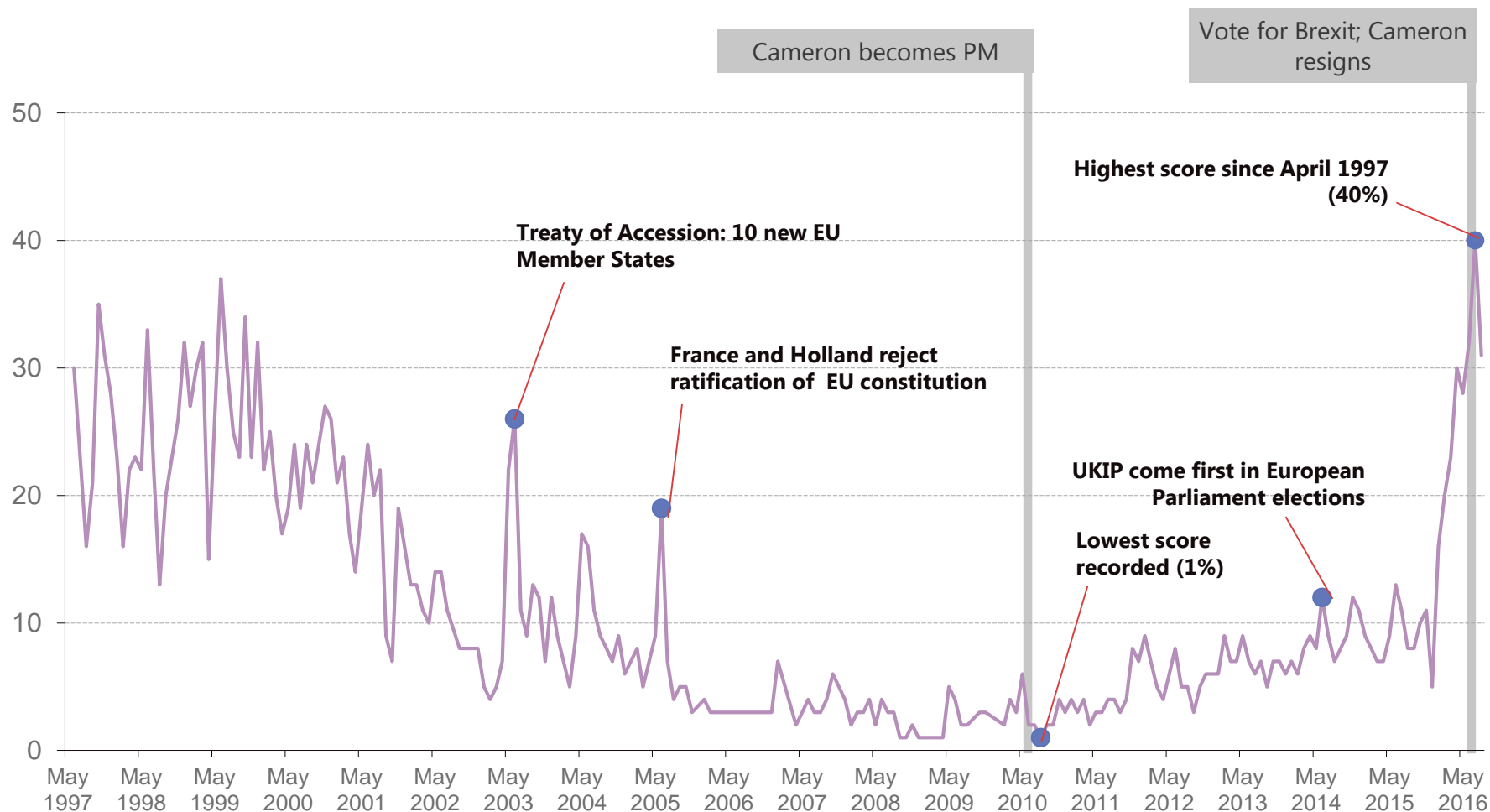
AMONG REMAIN VOTERS, 74% WHO SAID THEY WOULD VOTE REMAIN
IN OCTOBER SAID THEY WOULD STILL VOTE REMAIN IN APRIL



Among leave voters
81% who said they
would vote to leave in
October said they
would still vote
leave in April

Immediately post-Brexit, concern about EU rose to highest for 19 years

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

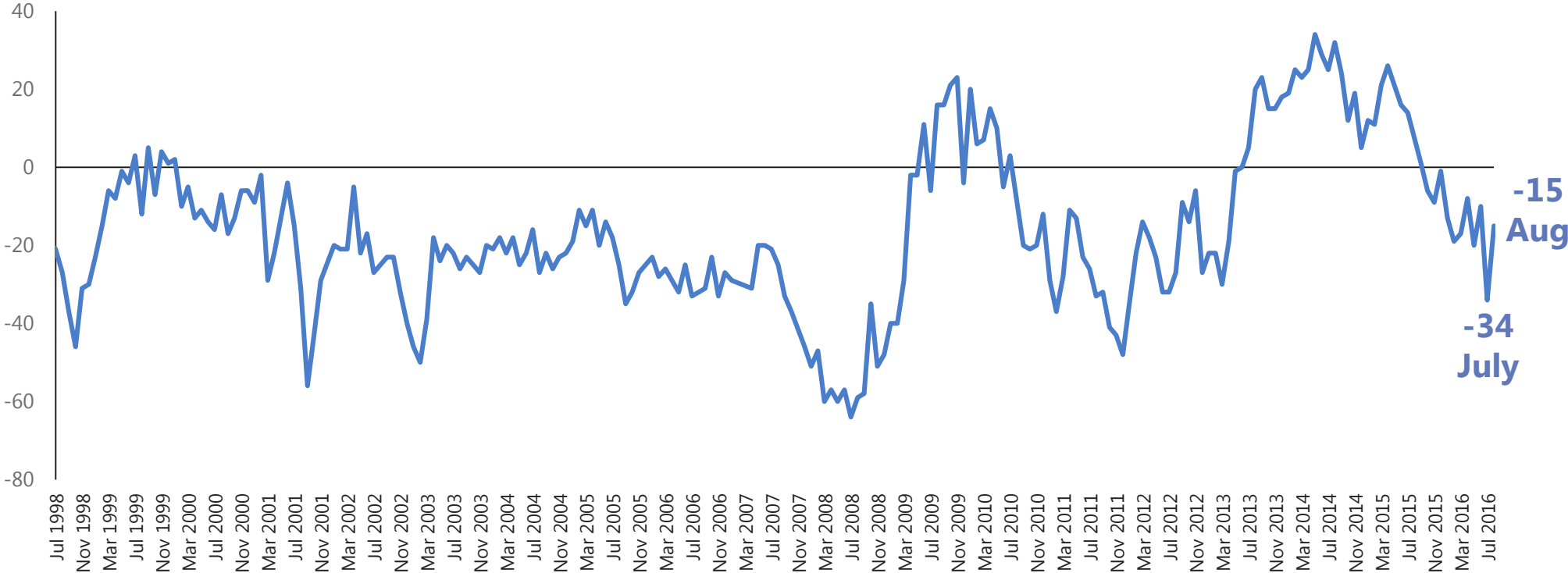


Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home

Source: Ipsos MORI Issues Index

While Ipsos MORI Economic Optimism Index fell to lowest for four years in July, although then recovered in August...

DO YOU THINK THAT THE GENERAL ECONOMIC CONDITION OF THE COUNTRY WILL IMPROVE, STAY THE SAME OR GET WORSE OVER THE NEXT 12 MONTHS?



Base: c.1,000 British adults each month

Source: Ipsos MORI Political Monitor

BUT in both cases

biggest increases

in concern

among pro-Remainers

Concern about EU up most among:

- Scotland and London residents (+20 and 16 points).
- Young people (+14 points among 18-24s)
- social grades AB (+16 points)

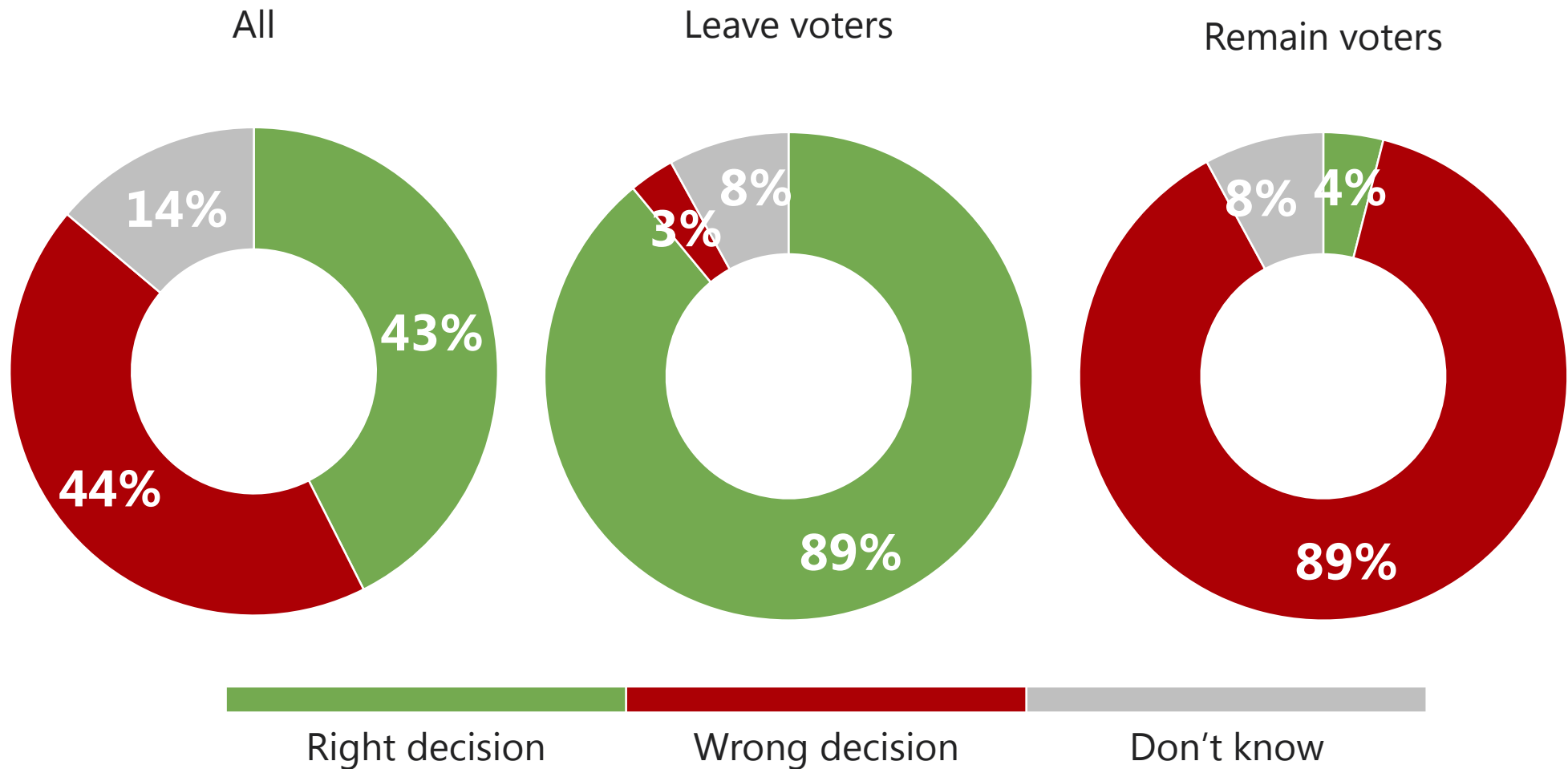
Pessimism about next year up most among:

- young people (+ 40 points among 18-34s)
- social grades AB (+ 43 points)
- mortgage holders and private renters (+43 and +39 points)
- the South (an increase of 43 points)

No sign of 'Bregret'

As you may know the United Kingdom voted to leave the European Union.

Do you think that was the right decision or the wrong decision for the United Kingdom?



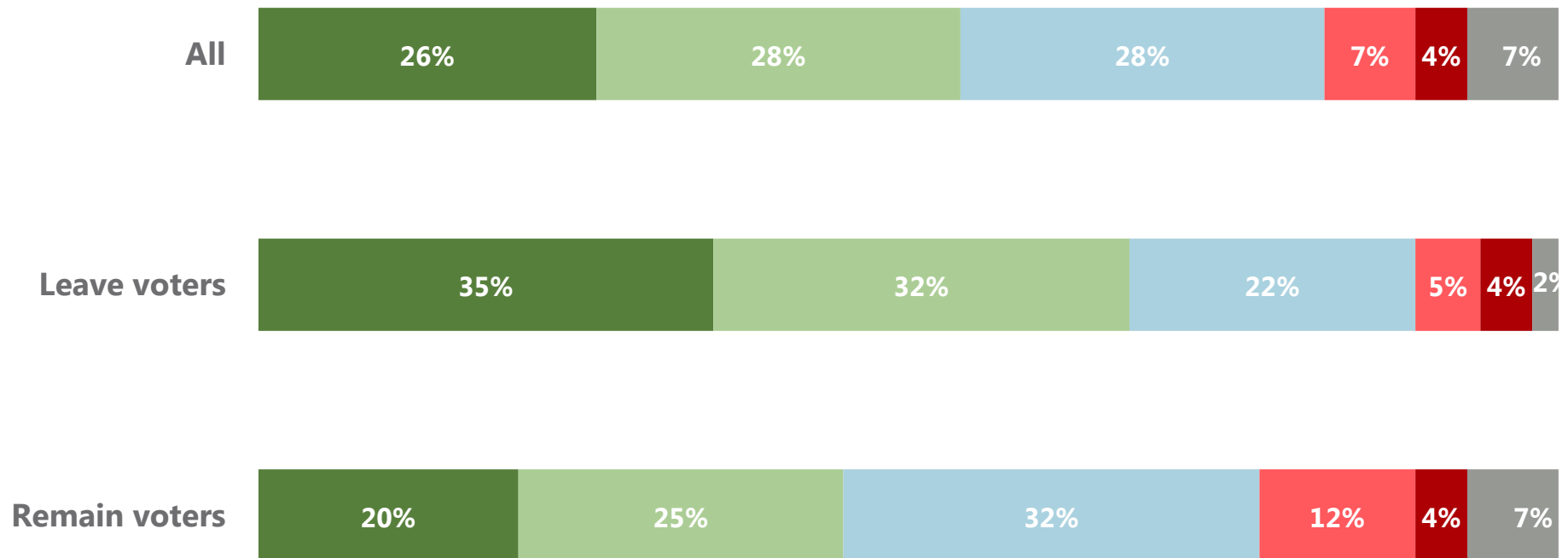
Base: 1,077 online GB adults aged 18-75 29th– 30th June 2016 (426 leave voters and 548 remain voters)

Source: Ipsos MORI

Even after the referendum, many Leave voters believed parliament did not reflect their views

“The currently elected Government and MPs do not reflect the views of the British public towards the European Union”

■ Strongly agree ■ Tend to agree ■ Neither agree nor disagree ■ Tend to disagree ■ Strongly disagree ■ Don't know



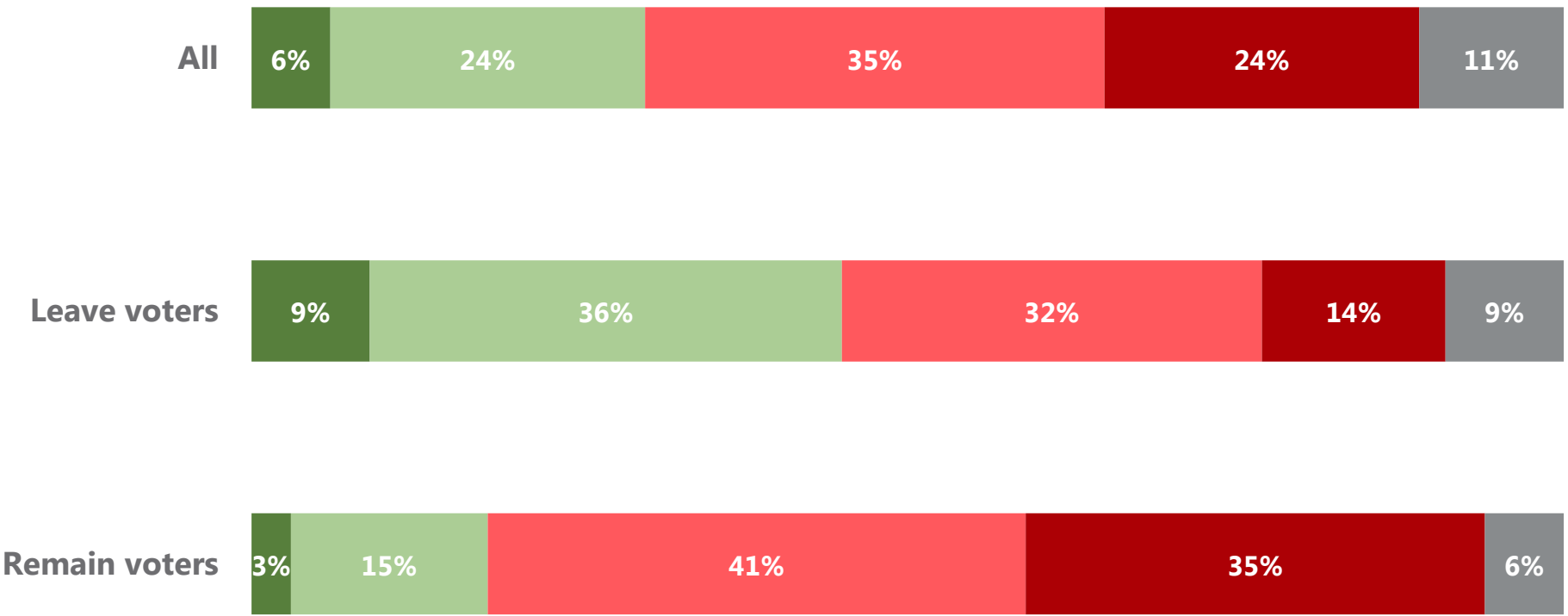
Base: 1,077 online GB adults aged 18-75 29th– 30th June 2016 (426 leave voters and 548 remain voters)

Source: Ipsos MORI

And confidence in politicians to get the best deal is low

How confident, if at all, are you in Britain's political leaders to get the best possible terms of exit for Britain from the European Union?

Very confident Fairly confident Not very confident Not at all confident Don't know

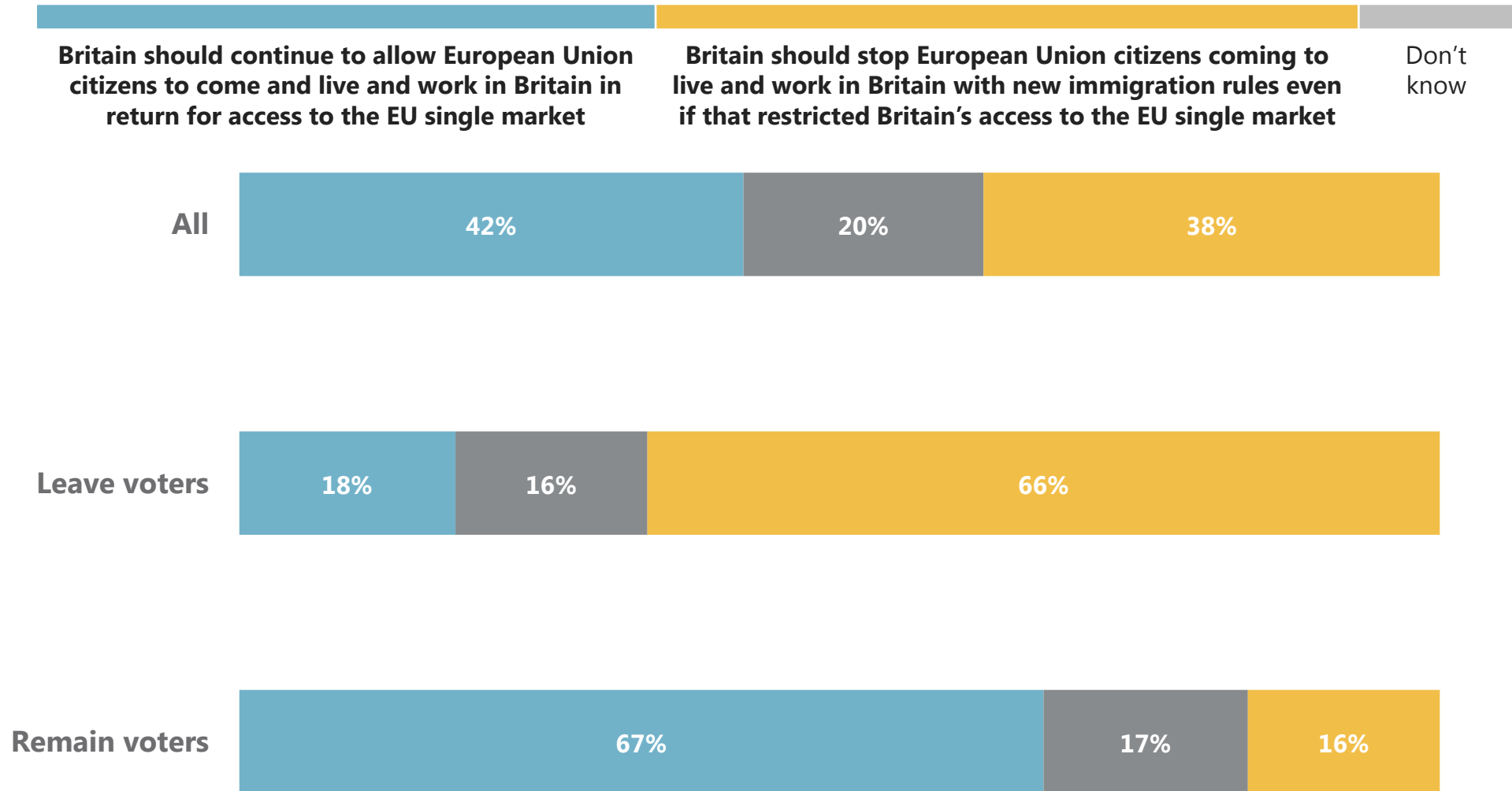


Base: 1,077 online GB adults aged 18-75 29th- 30th June 2016 (426 leave voters and 548 remain voters)

Source: Ipsos MORI

Still split on immigration vs single market access

And now that Britain has decided to leave the European Union which of the following statements comes closest to your view?



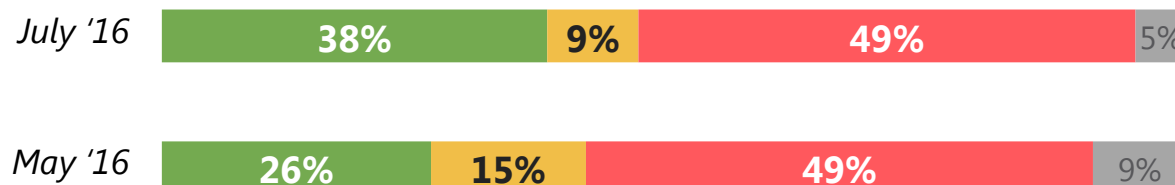
Base: 1,077 online GB adults aged 18-75 29th- 30th June 2016 (426 leave voters and 548 remain voters)

Source: Ipsos MORI

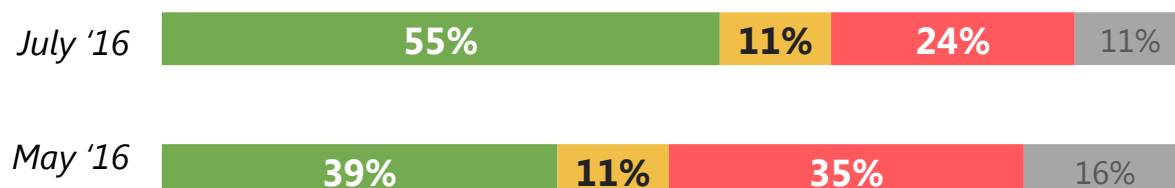
And still split on economic impact of Brexit (though if anything more optimistic than before June 23)

NOW THAT BRITAIN HAS VOTED TO LEAVE THE EU, TO WHAT EXTENT DO YOU THINK IT WILL BE BETTER OR WORSE FOR EACH OF FOLLOWING, OR WILL IT MAKE NO DIFFERENCE?

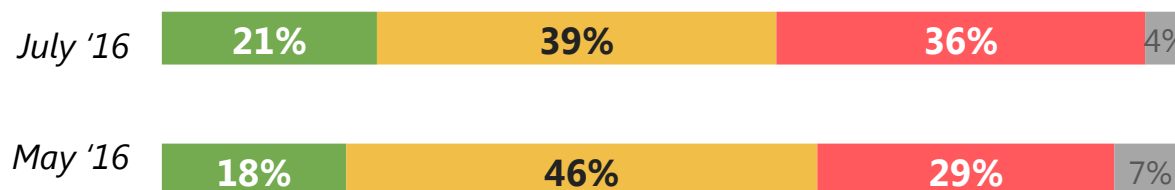
Britain's economy over the next five years



Britain's economy over the next ten to twenty years



Your own standard of living

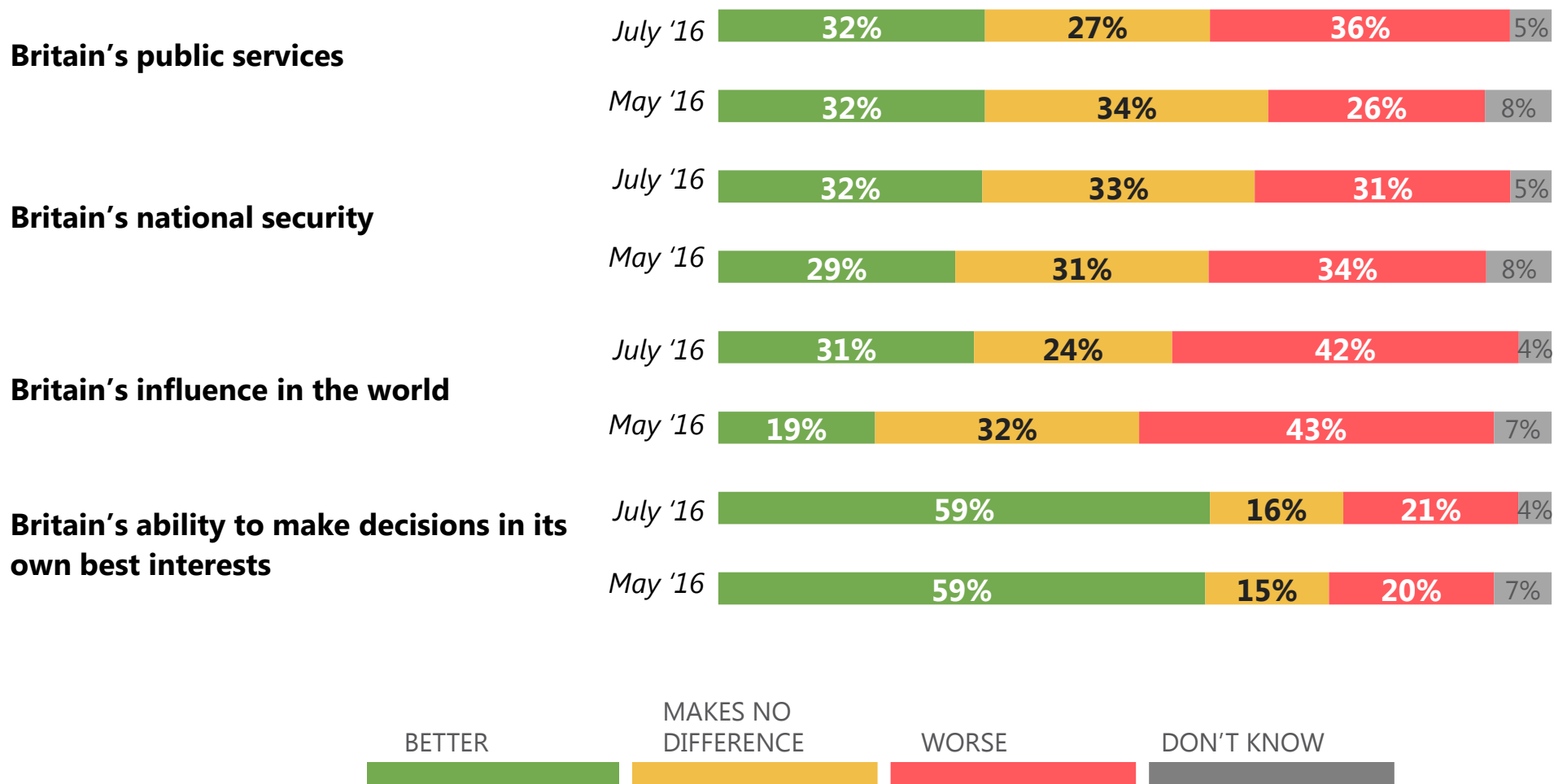


Base: 1,021 British adults 18+, 9th – 11th July 2016

Source: Ipsos MORI Political Monitor

Impact of Brexit on other issues

NOW THAT BRITAIN HAS VOTED TO LEAVE THE EU, TO WHAT EXTENT DO YOU THINK IT WILL BE BETTER OR WORSE FOR EACH OF FOLLOWING, OR WILL IT MAKE NO DIFFERENCE?

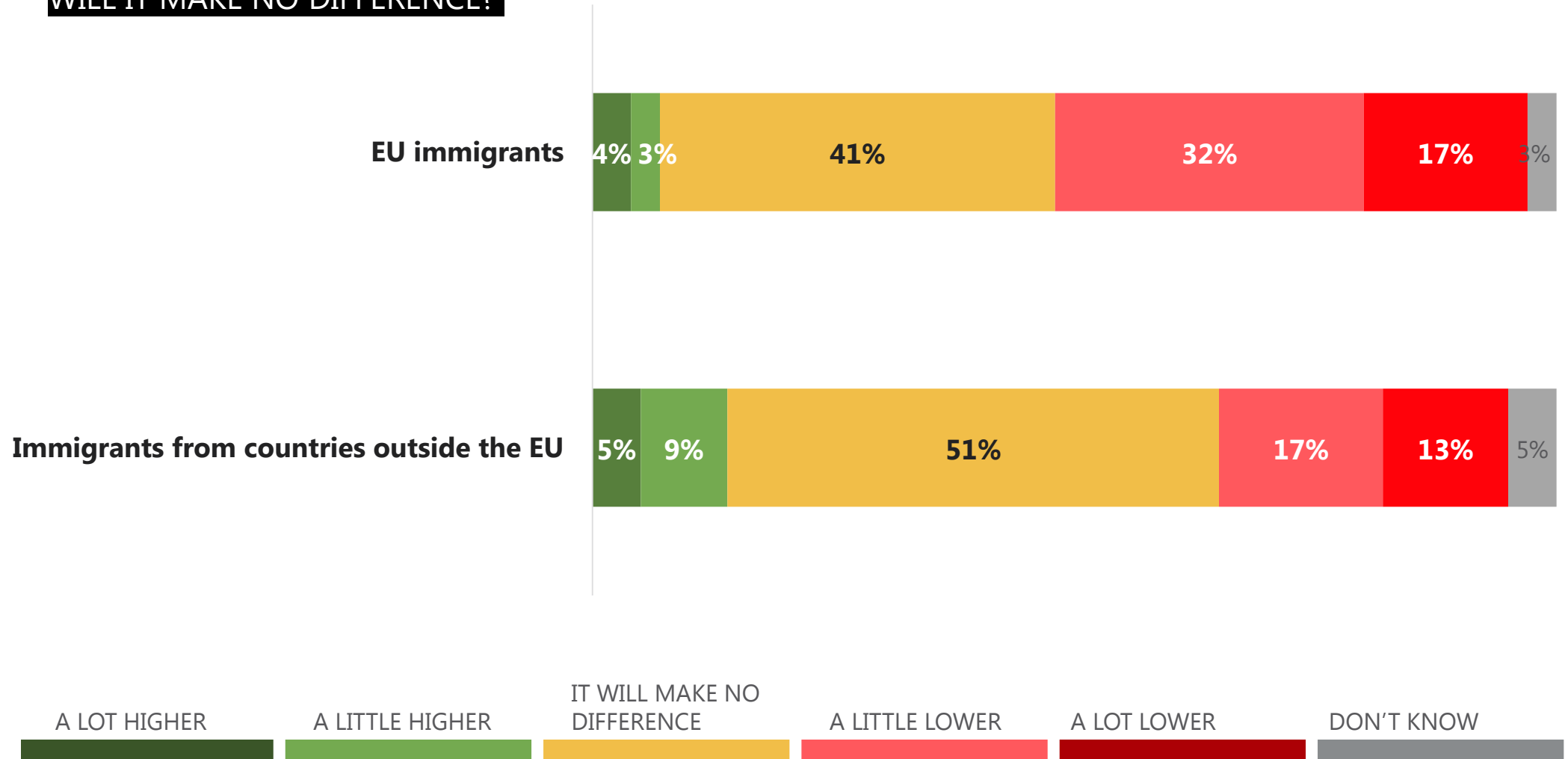


Base: 1,026 British adults 18+, 9th – 11th July 2016

Source: Ipsos MORI Political Monitor

Impact of Brexit on immigration numbers

AND NOW THAT BRITAIN HAS VOTED TO LEAVE THE EU, TO WHAT EXTENT DO YOU THINK THE NUMBER OF ... COMING TO THE UK WILL BE HIGHER OR LOWER THAN IF BRITAIN HAD VOTED TO REMAIN, OR WILL IT MAKE NO DIFFERENCE?

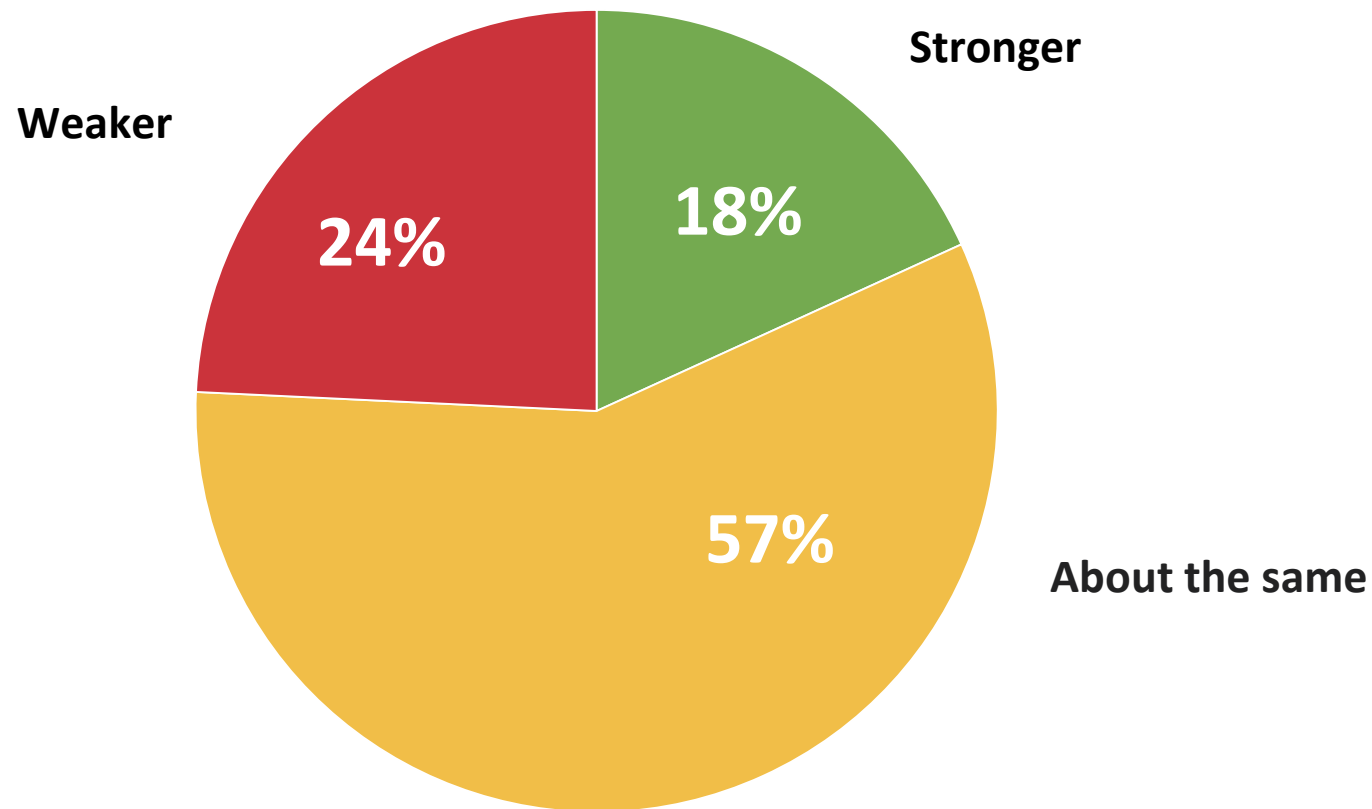


Base: 1,021 British adults 18+, 9th – 11th July 2016

Source: Ipsos MORI Political Monitor

Most do not expect a change in their personal financial situation over next 6 months

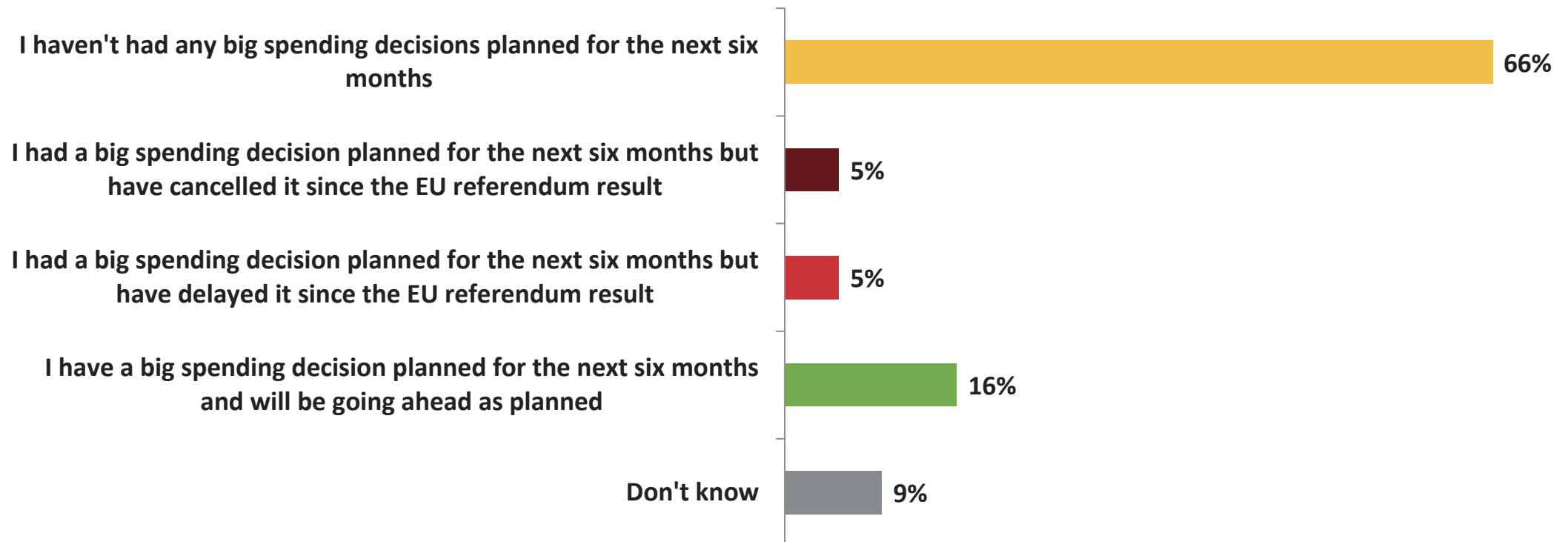
Looking ahead six months from now, do you expect your financial situation to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?



Base: 1,124 online adults aged 16-75 across the UK. Interviews conducted online, from 15th-19th July 2016

One in ten say they have delayed a major purchase because of Brexit

As you will know, on June 23rd the UK voted to leave the EU in the referendum. Think about the impact the EU referendum result may have had on any big spending decisions you may have had planned for the next six months. These might be, for example, buying a car, going on holiday, moving house and so on. Which of the following statements, if any, apply to you?



Base: 1,124 online adults aged 16-75 across the UK. Interviews conducted online, from 15th-19th July 2016

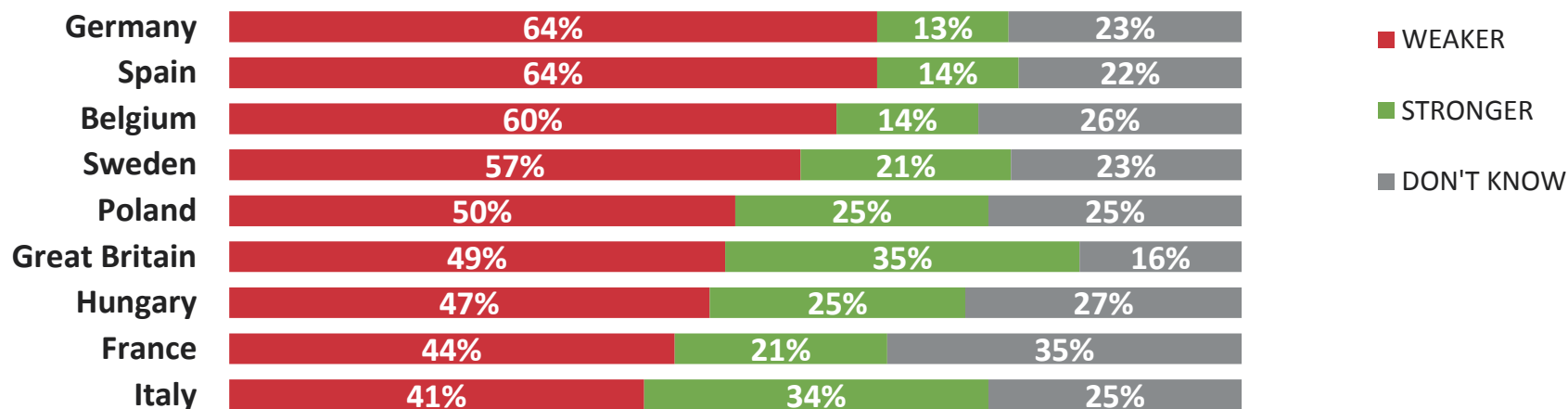
**International reaction
points to some
challenges ahead**



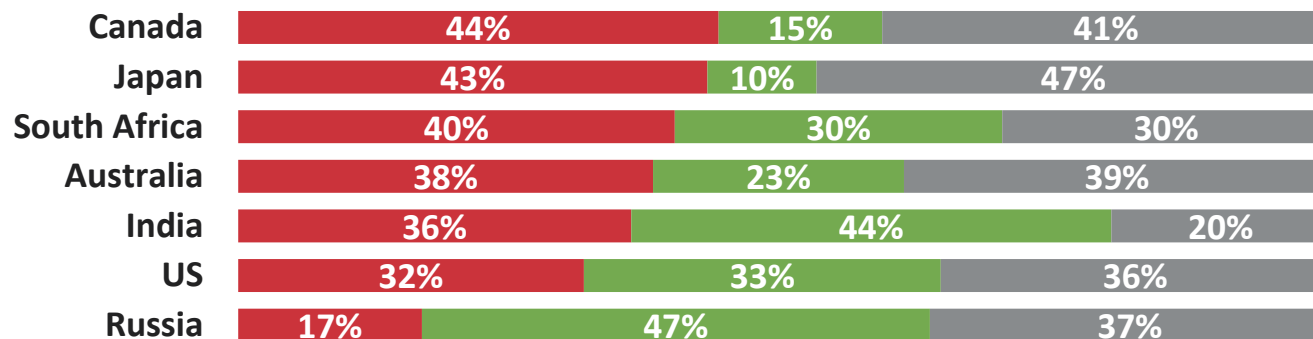
Germans and Spanish most likely to think Brexit will weaken Britain – but Indians and Russians think GB will be stronger out

Following on from the UK's vote to leave the European Union, do you think the UK will be stronger or weaker?

European Union countries



Countries outside of the European Union



Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

Britons think they should get a favourable deal – but French and Belgians say priority is to stop others from leaving

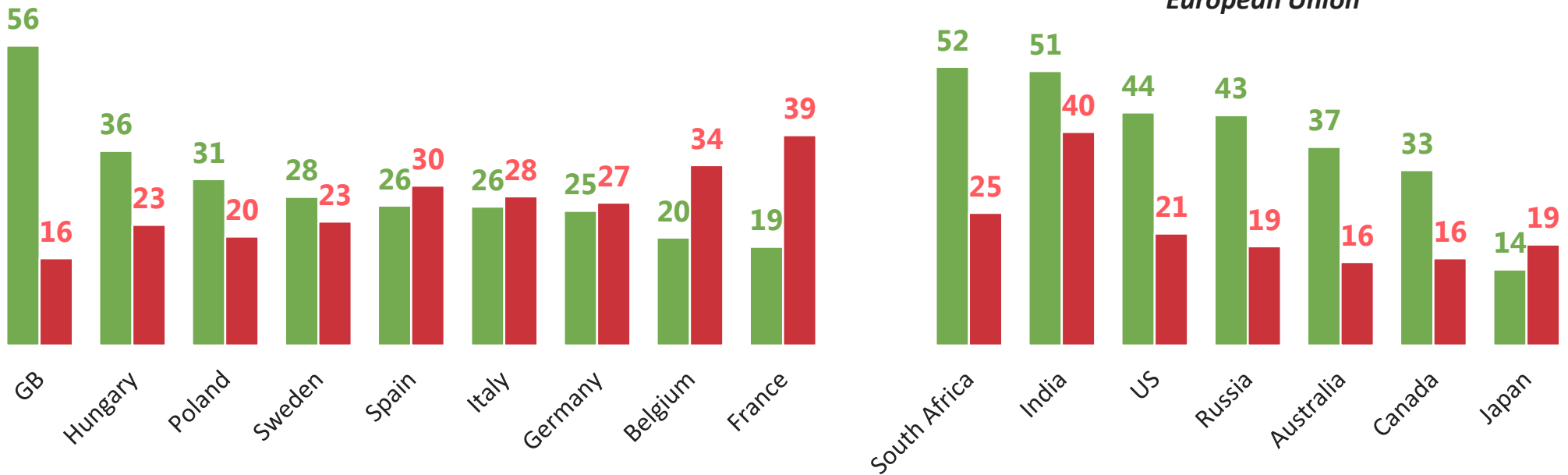
To what extent do you agree or disagree with the following statements? - *The European Union should offer favourable/ unfavourable terms to Britain in negotiations about their future relationship to reduce the negative impact on the economy overall/in order to discourage other countries from leave the European Union*

% THINK THAT EU SHOULD OFFER
FAVOURABLE TERMS TO BRITAIN

% THINK THAT EU SHOULD OFFER
UNFAVOURABLE TERMS TO BRITAIN

European Union countries

Countries outside of the European Union

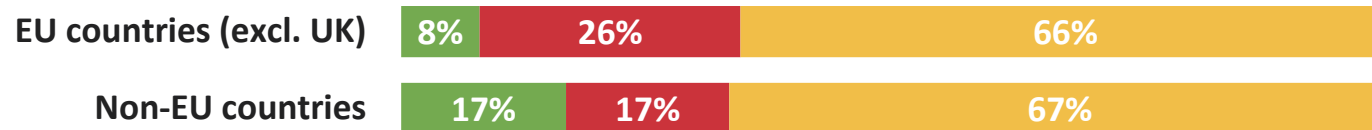


Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

One in four in EU countries say less likely to visit the UK or buy British – but most say it will make no difference Ipsos Public Affairs

After the UK's vote to leave the EU, are you more likely or less likely to do each of the following, or does it make no difference?

Visit the UK on holidays

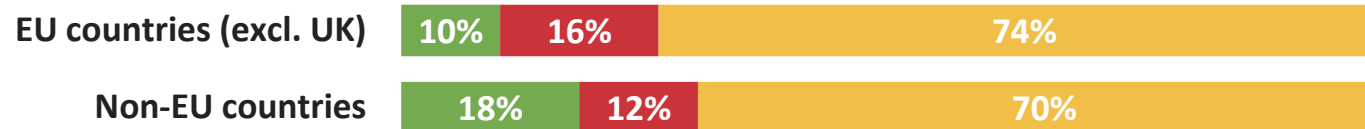


MORE LIKELY

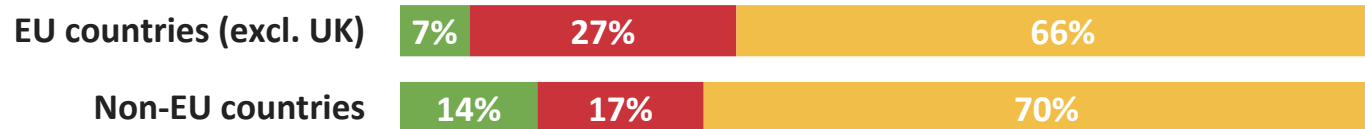
LESS LIKELY

MAKE NO DIFFERENCE

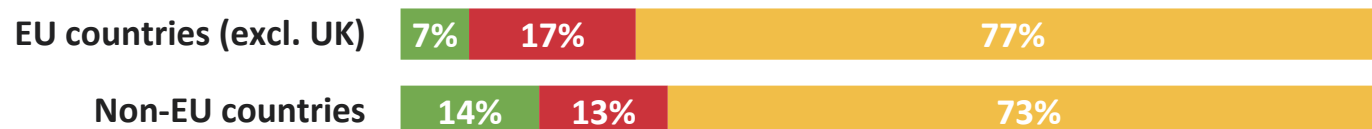
Welcome British tourists to your country



Buy British goods or services



Consume British culture, such as TV, films, books or music

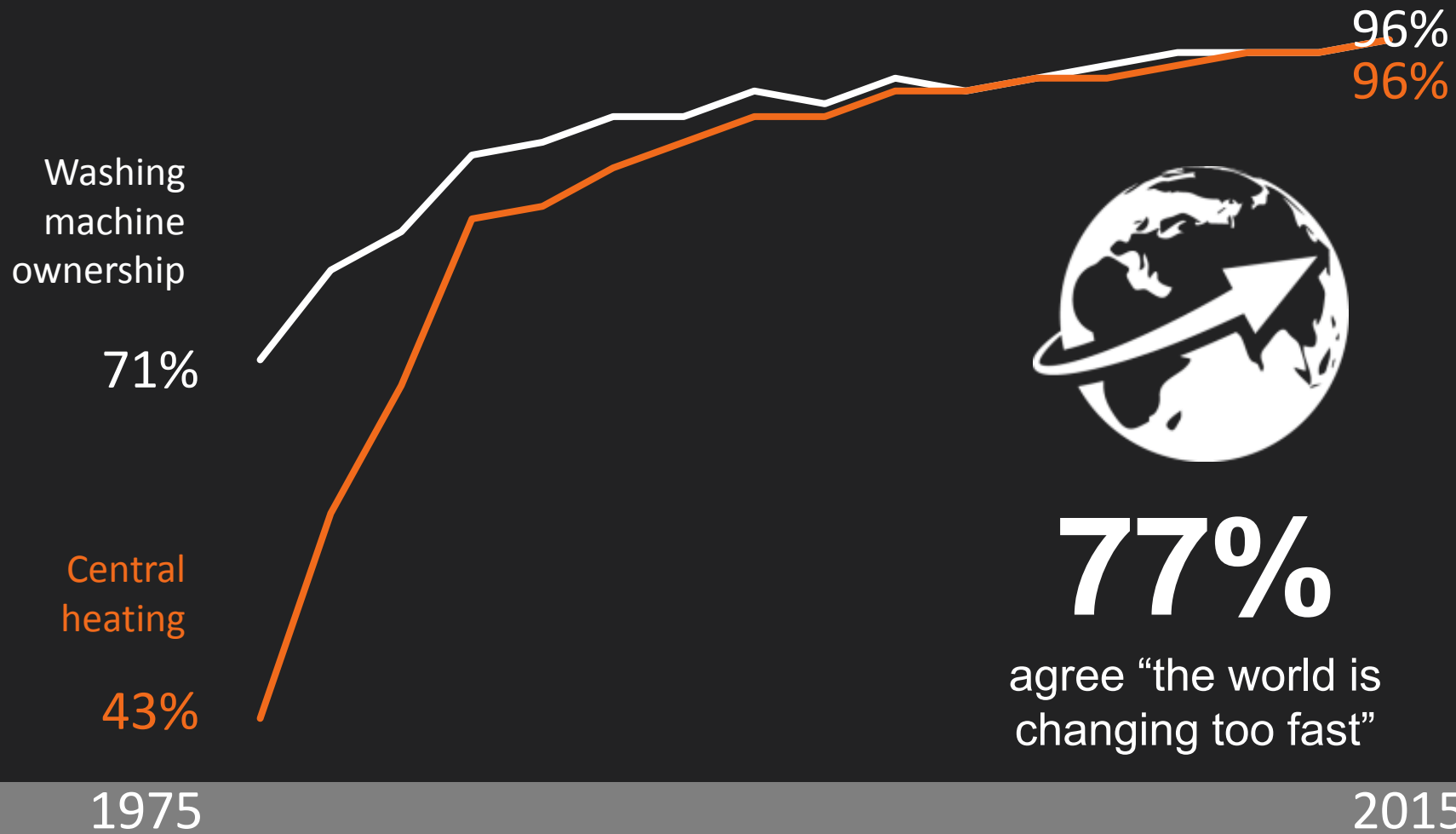


Base: 11,523 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

**Fundamentals haven't
changed - we are living
in much more uncertain
world**



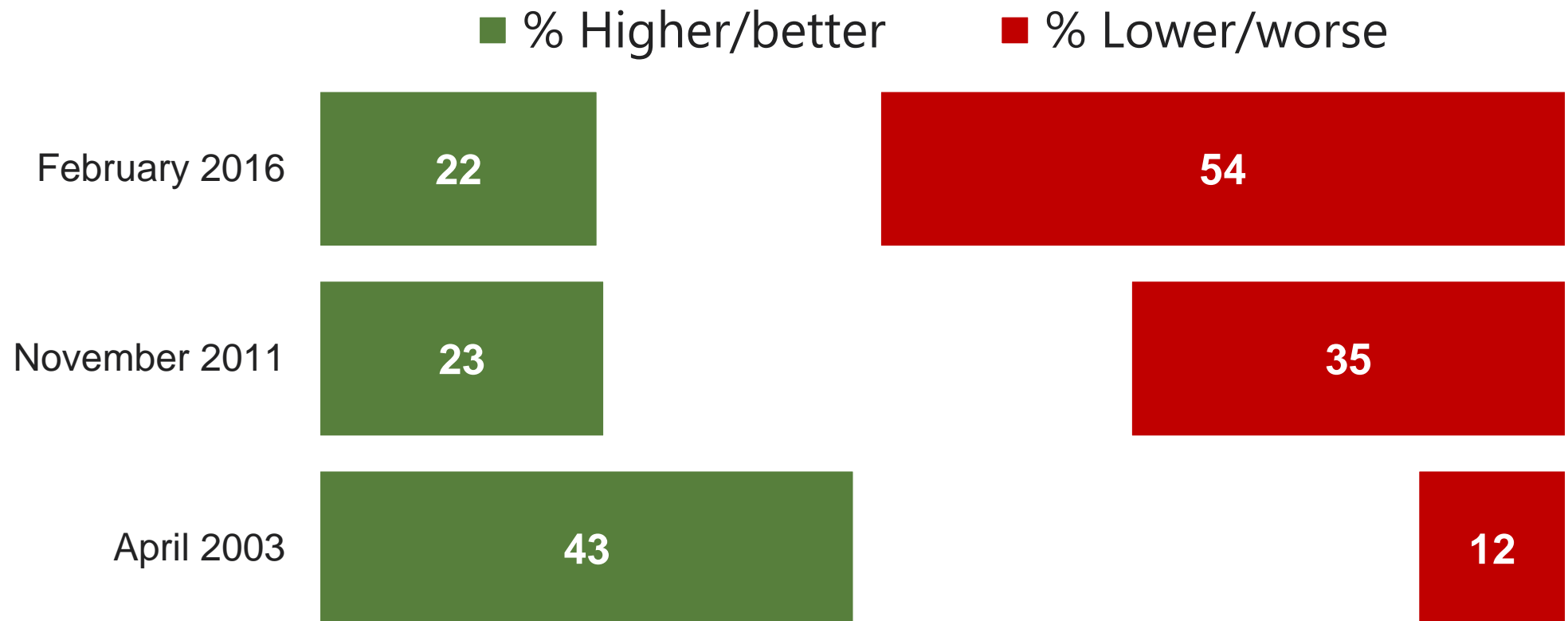
Life is more comfortable compared to the 1970s – but we still suffer from change anxiety



Can't forget the impact of the crash

56% said the recession would weaken Britain for years to come.....

When they reach your age, do you think today's youth will have a higher/better or lower/worse quality of life than you / their parents' generation, or about the same?



Base: 1,001 British adults 18+, 13th – 16th February 2016

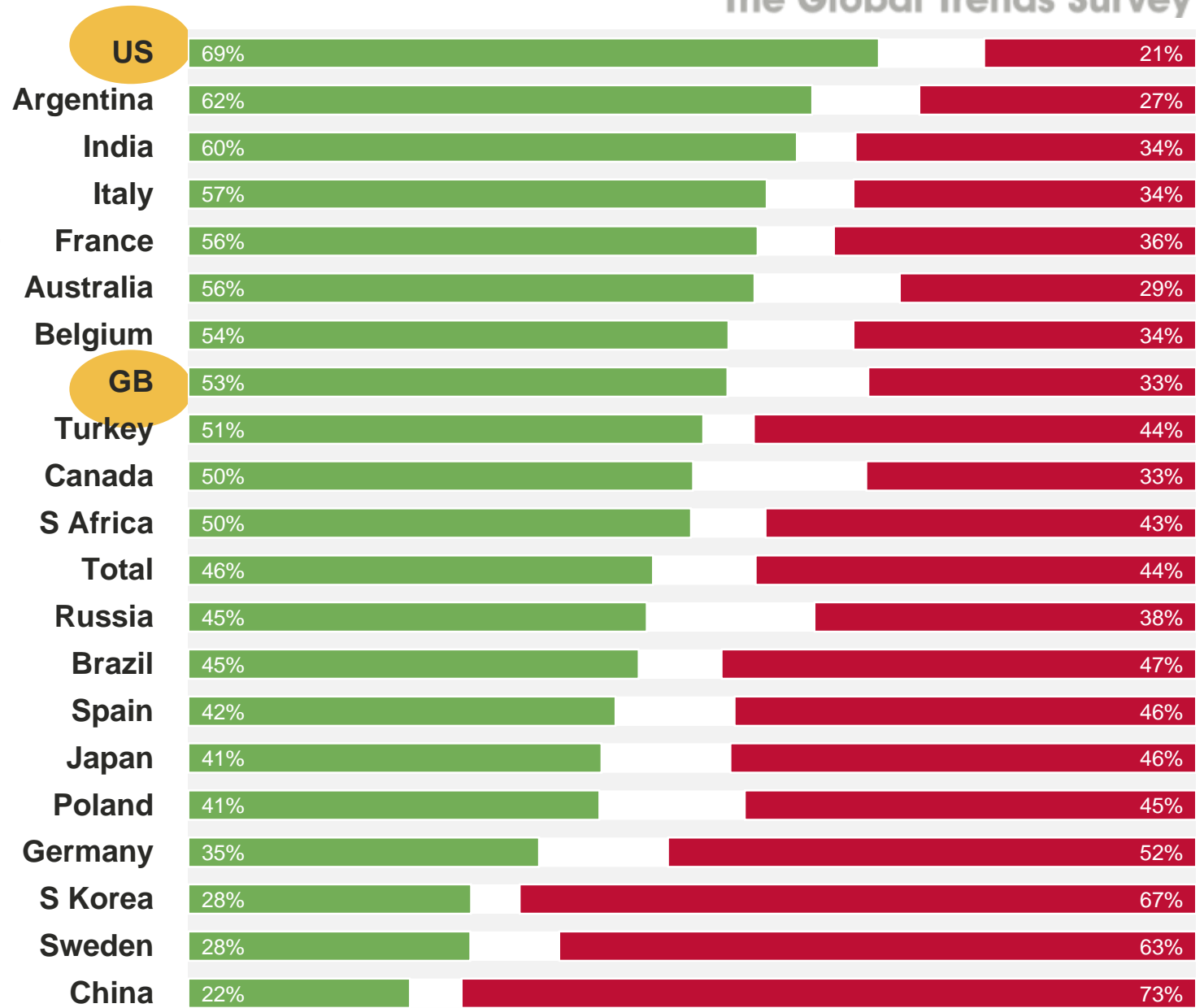
Patriotic nostalgia seen around the world

The Global Trends Survey



To what extent do you agree or disagree...?

I would like...to be the way it used to be



Key

- Agree
- Disagree
- Total
- Great Britain



Sections

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109

Monkey Cage

It's not just Trump. Authoritarian populism is rising across the West. Here's why.

By Pippa Norris March 11

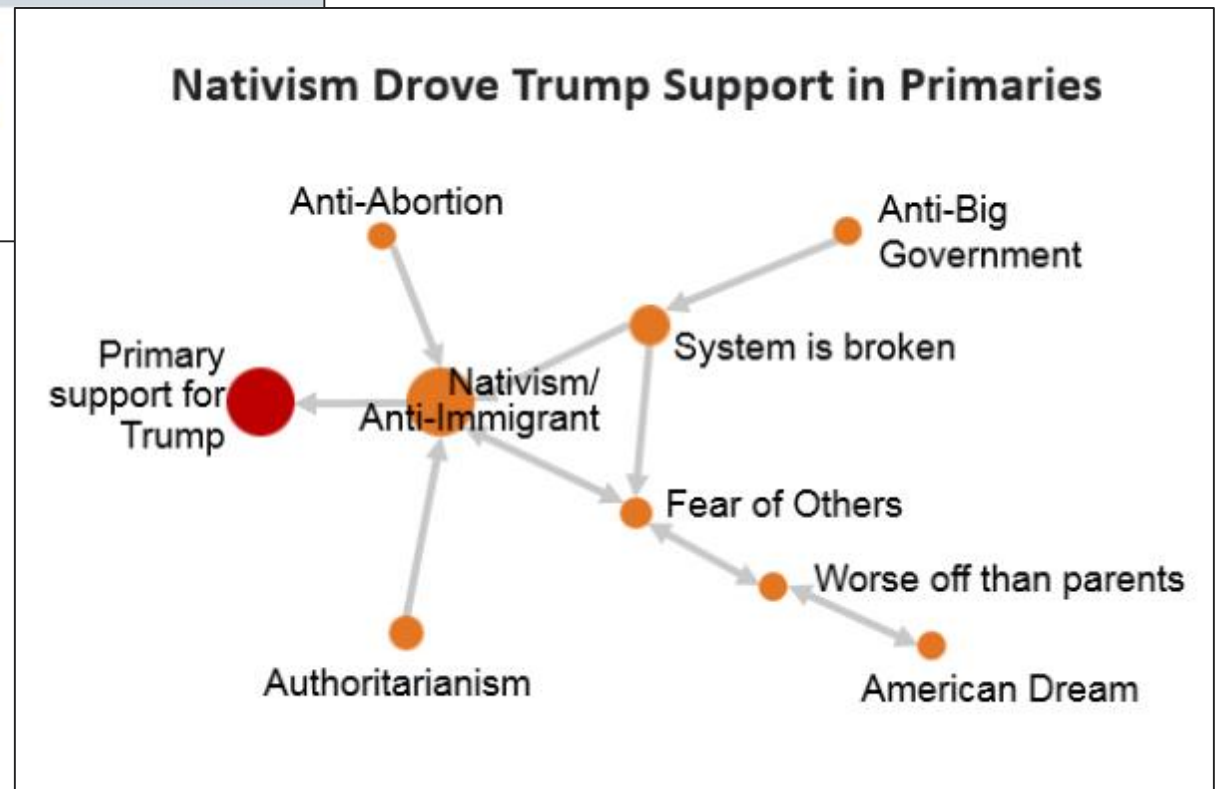
Not just driven by economy/inequality, backlash against too-fast cultural change. Strong focus on immigration in US and UK...

Nativism seems the key driving force for Trump.....



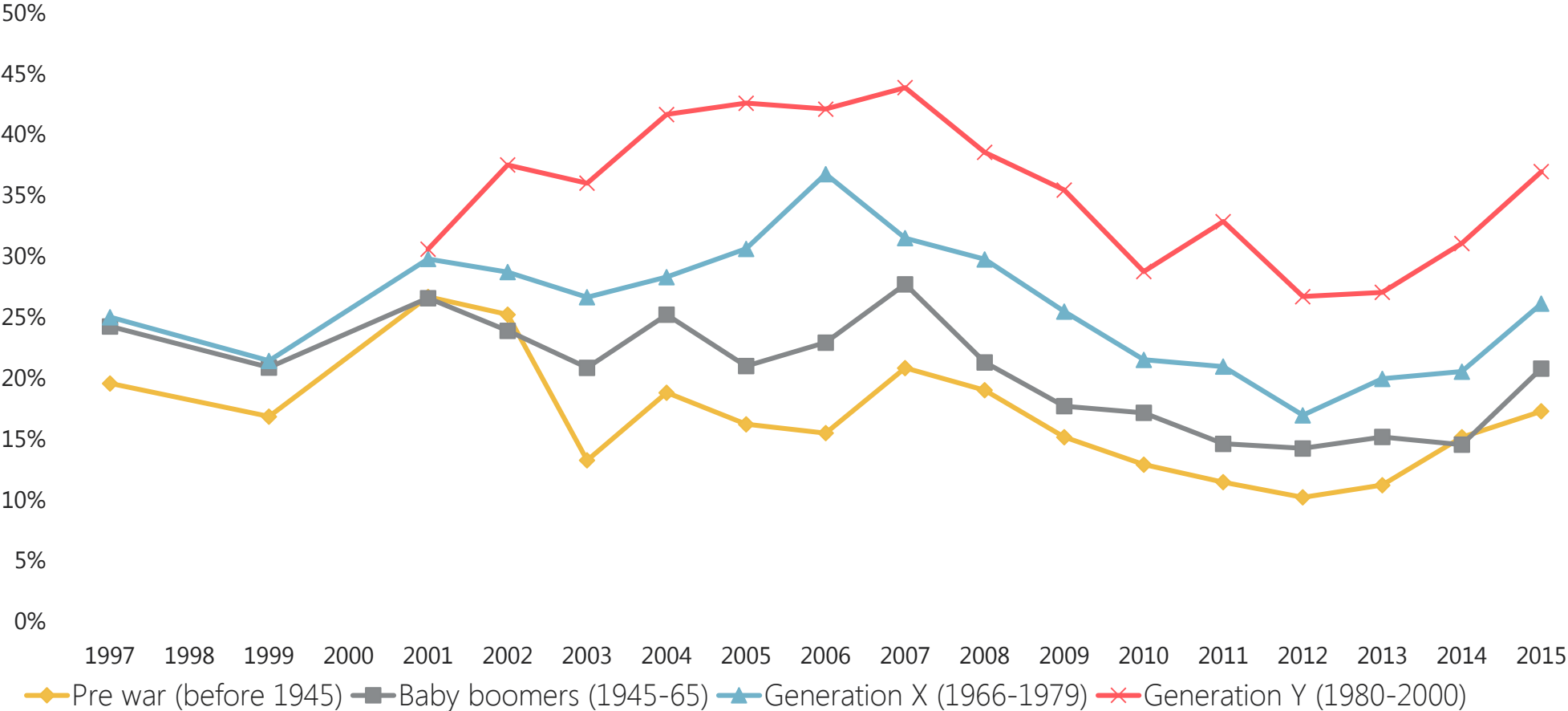
It's Nativism: Explaining the Drivers of Trump's Popular Support

by: Clifford Young | Elections, News, Politics, Public Affairs, Public Opinion | Jun 1, 2016



Although current cohort of young may have different view....

% tend to trust the European Union



All points represent > 200 responses

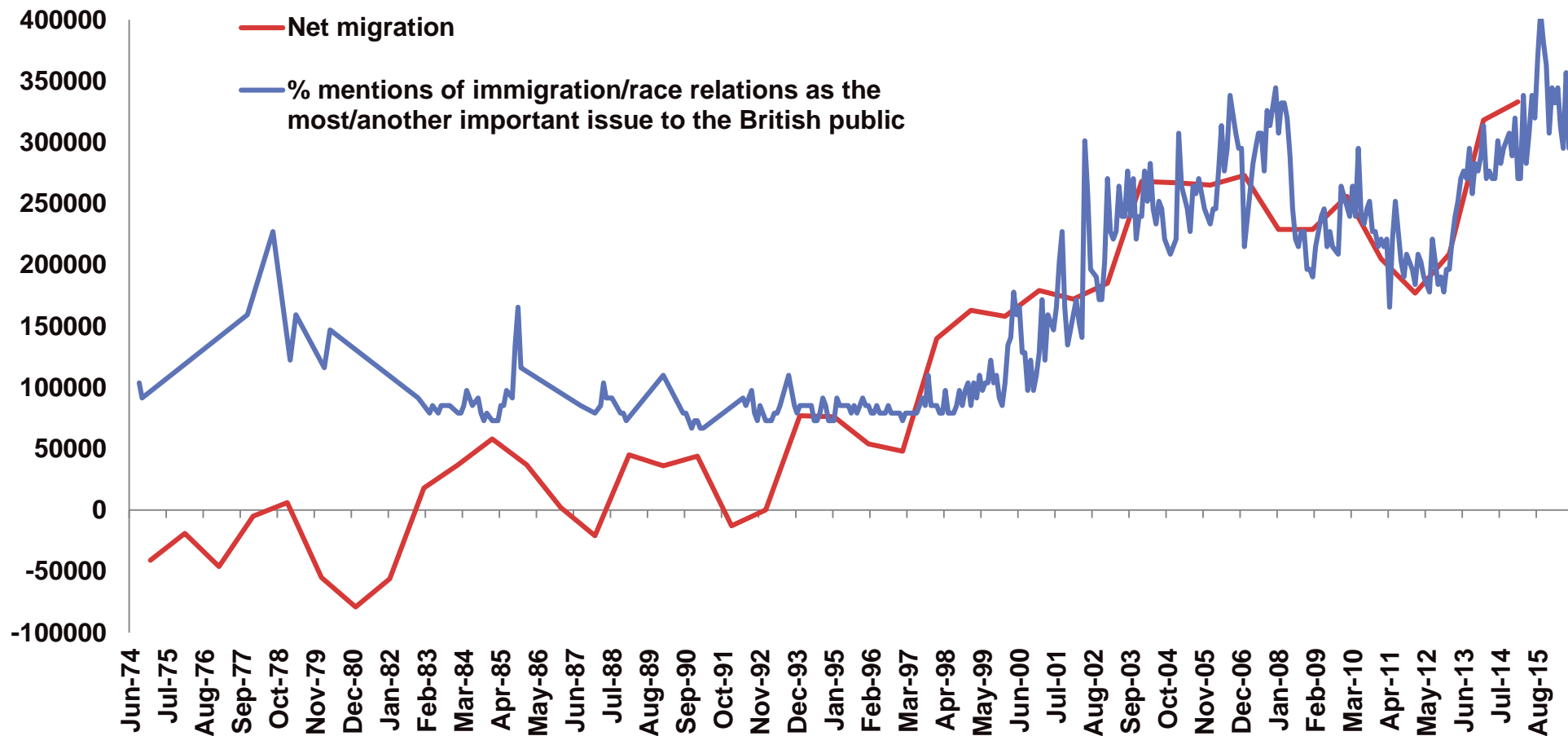
Attitudes to immigration



Concern about immigration the highest we've ever seen – in line with rising net migration

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

36



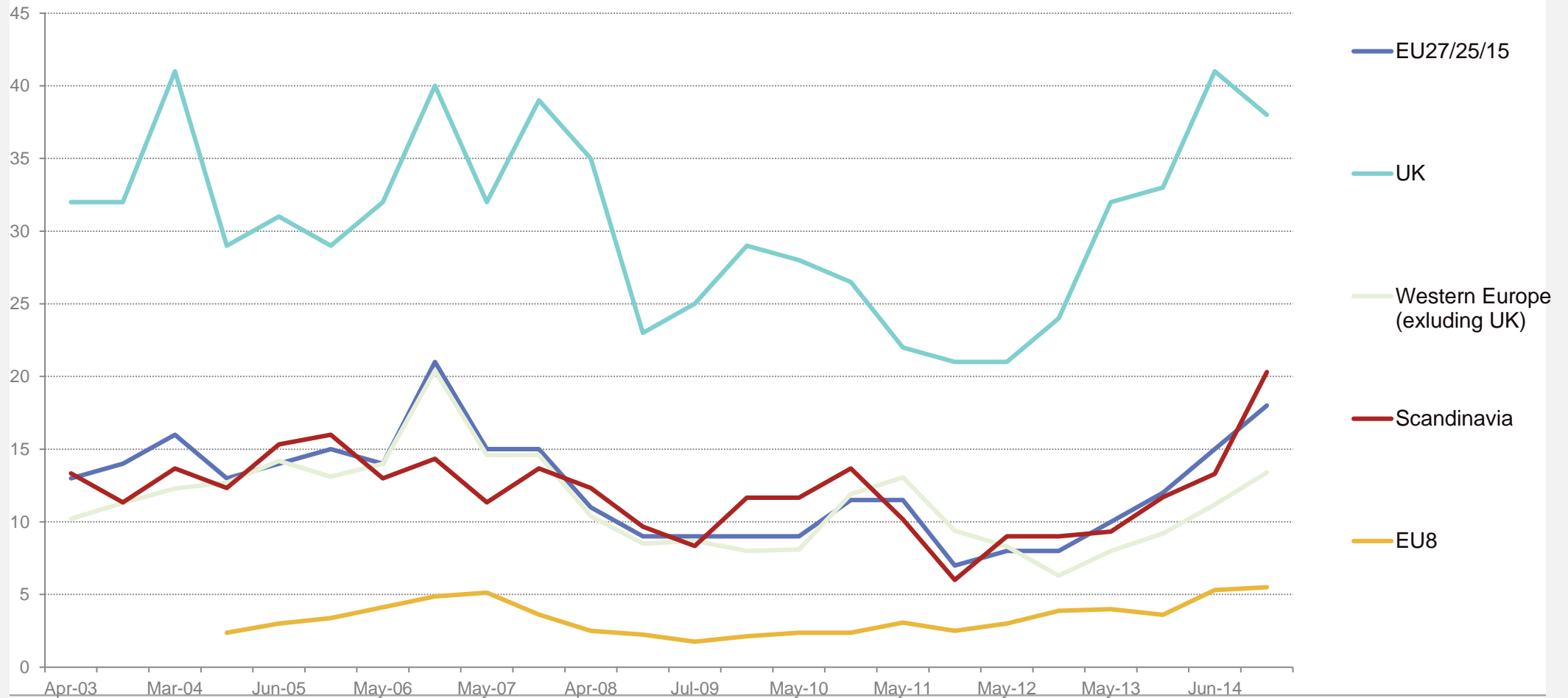
Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home
NB Until Sept 2014 the code was race relations/immigration/immigrants

Source: Ipsos MORI Issues Index

UK an outlier on salience for more than a decade

What do you think are the two most important issues facing (OUR COUNTRY) at the moment? % IMMIGRATION

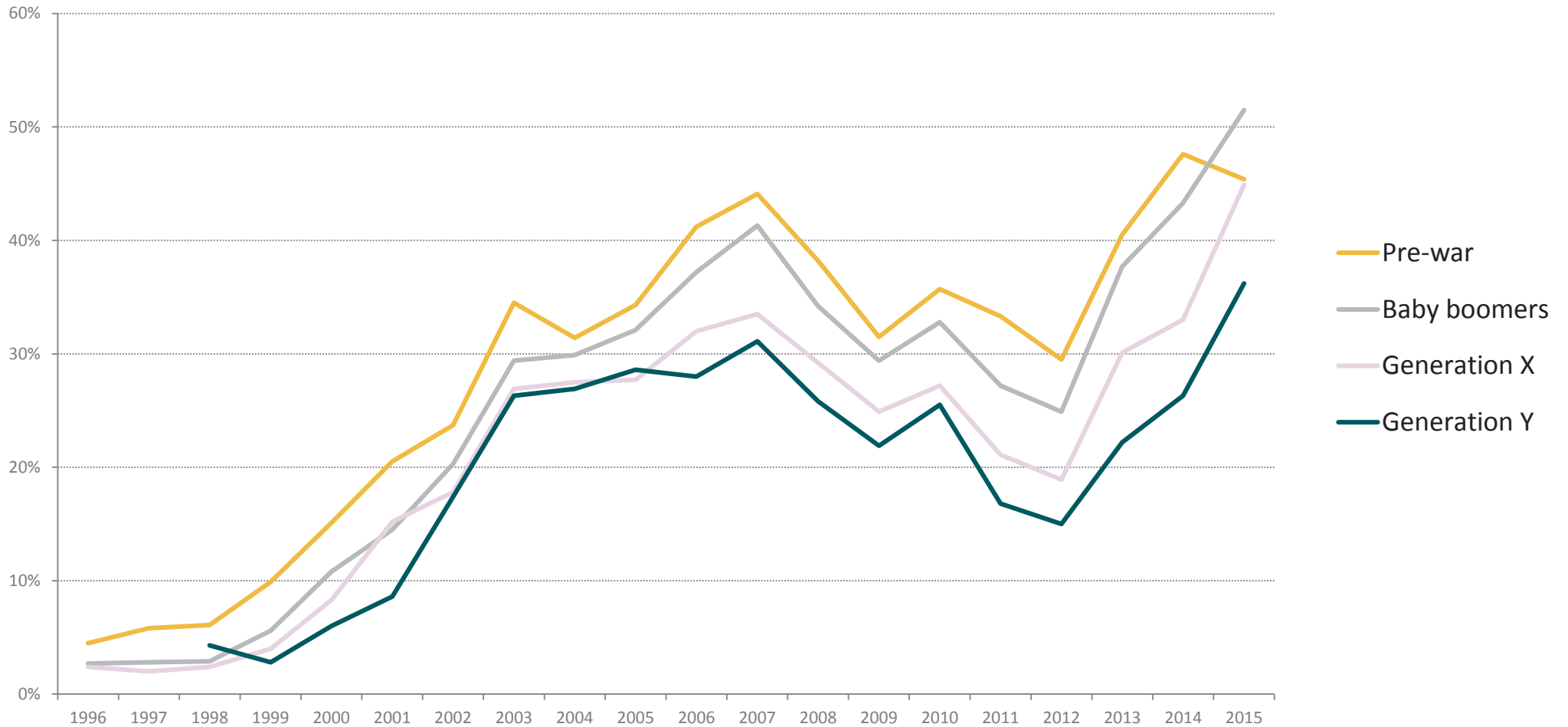
37



Source: Standard Eurobarometer

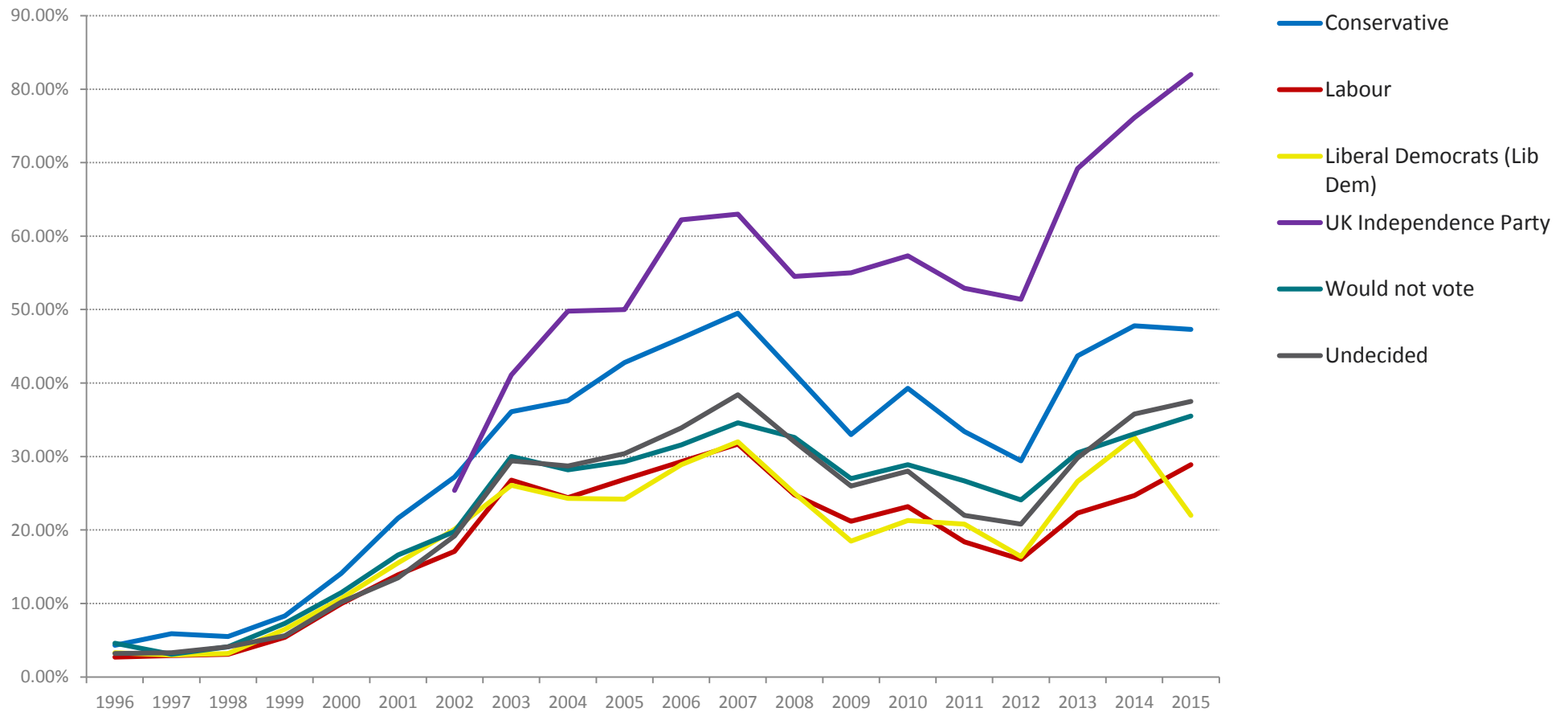
Baby boomers have become most worried about immigration but concern increasing among all generations

What would you say is the most important issue/other important issues facing Britain today? RACE RELATIONS/IMMIGRATION



Differences between parties have widened since early 2000s

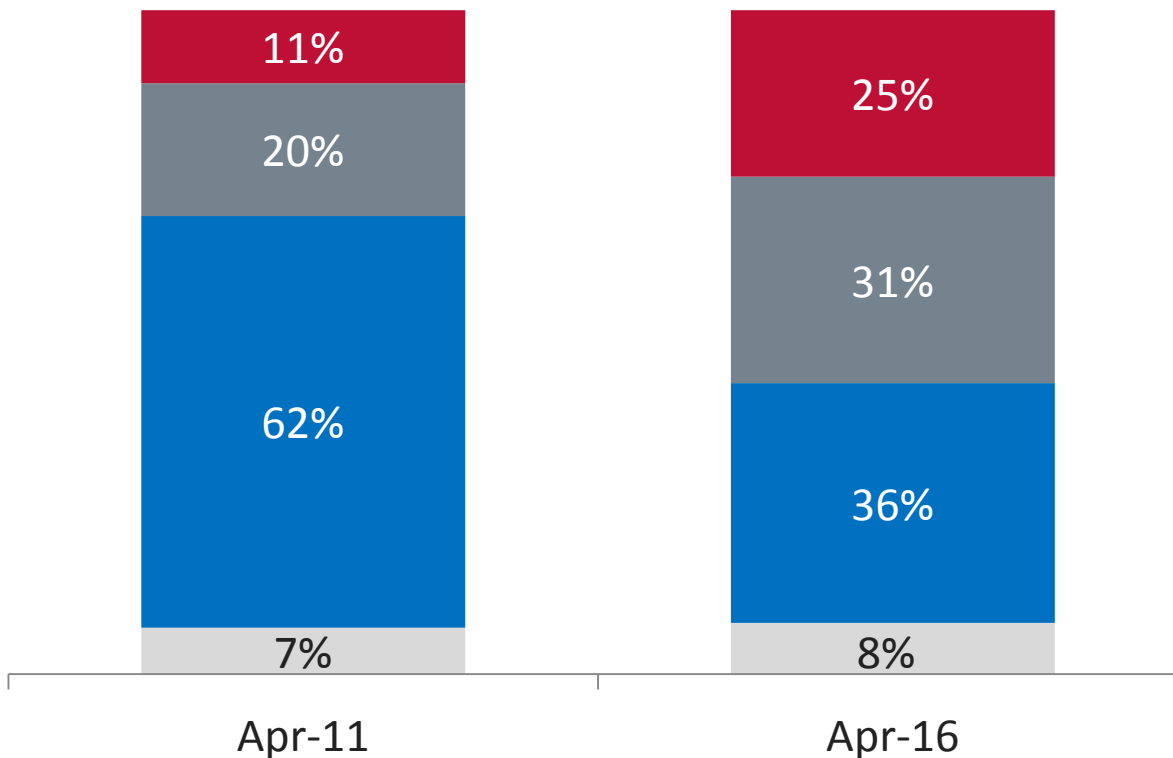
What would you say is the most important issue/other important issues facing Britain today? IMMIGRATION



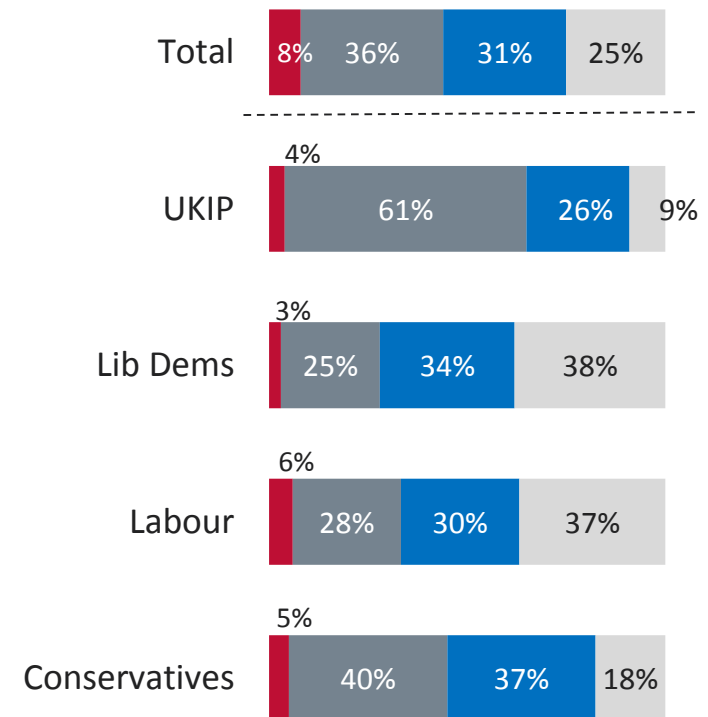
The public have noticed an increase in the amount of immigration discussion – but still over a third don't think we're talking about it enough

Generally speaking, do you think that the issue of immigration has been discussed in Britain too much, too little or about the right amount over the last few years/months?

■ Too much ■ About the right amount ■ Too little ■ Don't know



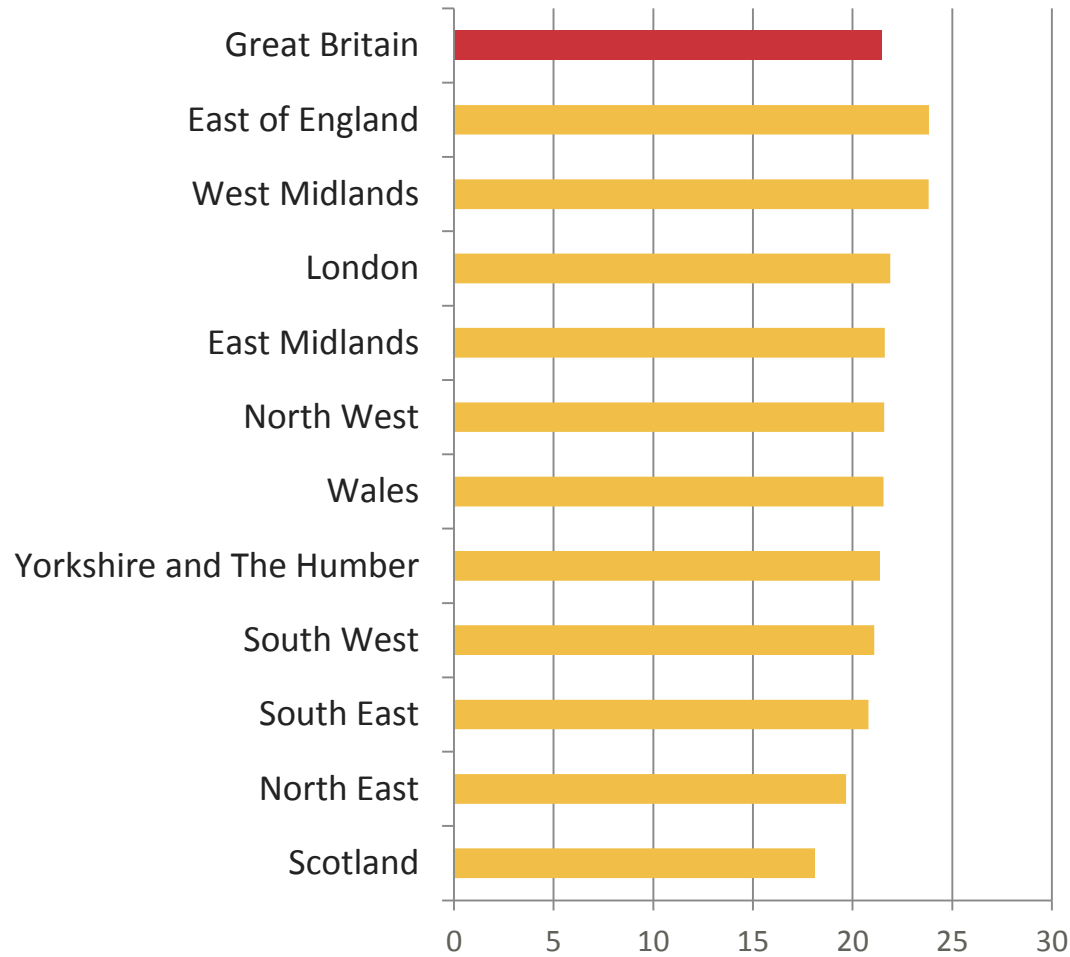
By party (April 2016)



Source: YouGov April 2011; Ipsos MORI, Feb 2015

The foreign born population is overestimated across the UK

What percentage of the United Kingdom population do you think are immigrants to this country (i.e. not born in the UK)? MEAN



Source: Ipsos MORI polling; nationally representative sample of 4,574 British adults 16+ (Feb-March 2015)

Ipsos MORI

Census Figures (%)

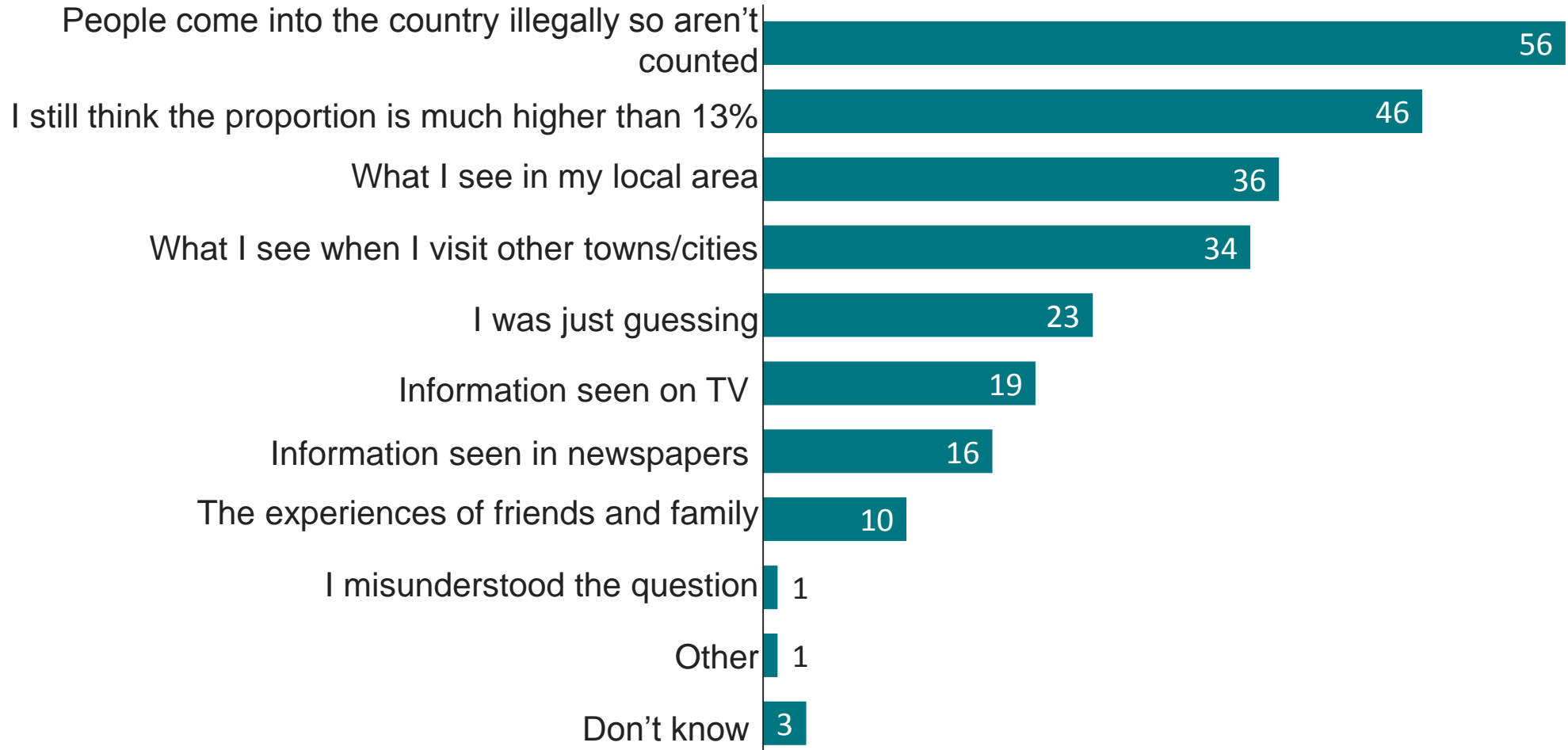
	2001	2011	Change
UK	8.3	12.7	4.4
East of England	7	11	4
West Midlands	7.6	11.2	3.6
London	27.1	36.7	9.6
East Midlands	6	9.9	3.9
North West	5.1	8.2	3.1
Wales	3.2	5.5	2.3
Yorkshire and Humberside	5.3	8.8	3.5
South West	5.1	7.7	2.6
South East	8.2	12.1	3.9
North East	2.9	5	2.1
Scotland	3.8	7	3.2

Source: ONS



Many don't believe the official numbers

According to the last Census in 2011, the percentage of the UK population that was born in another country is actually 13%. Why do you think the percentage is much higher?

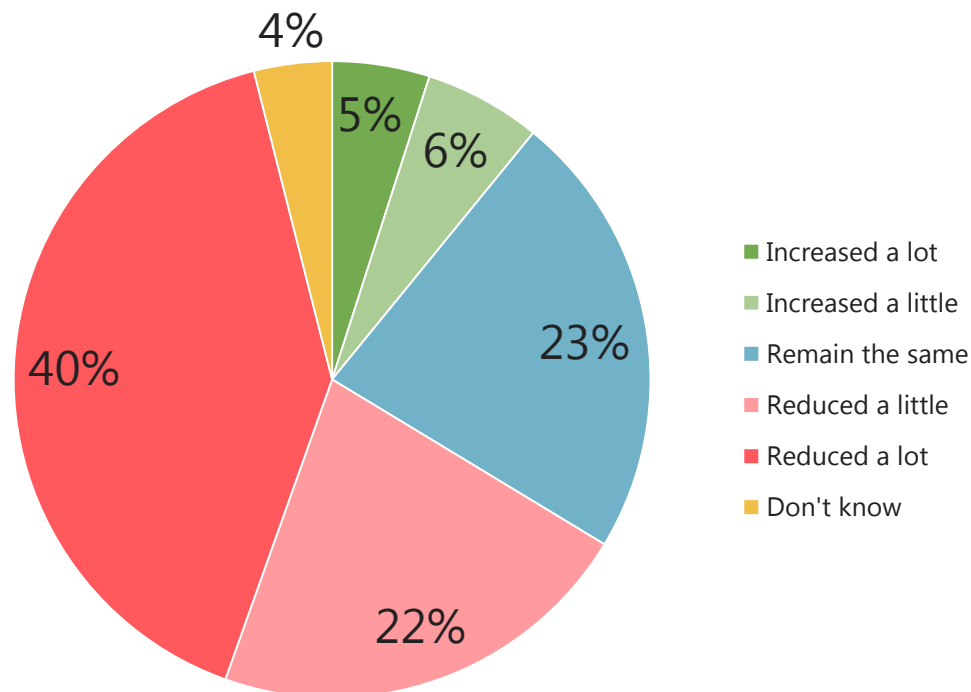


There is still majority support for reducing immigration levels

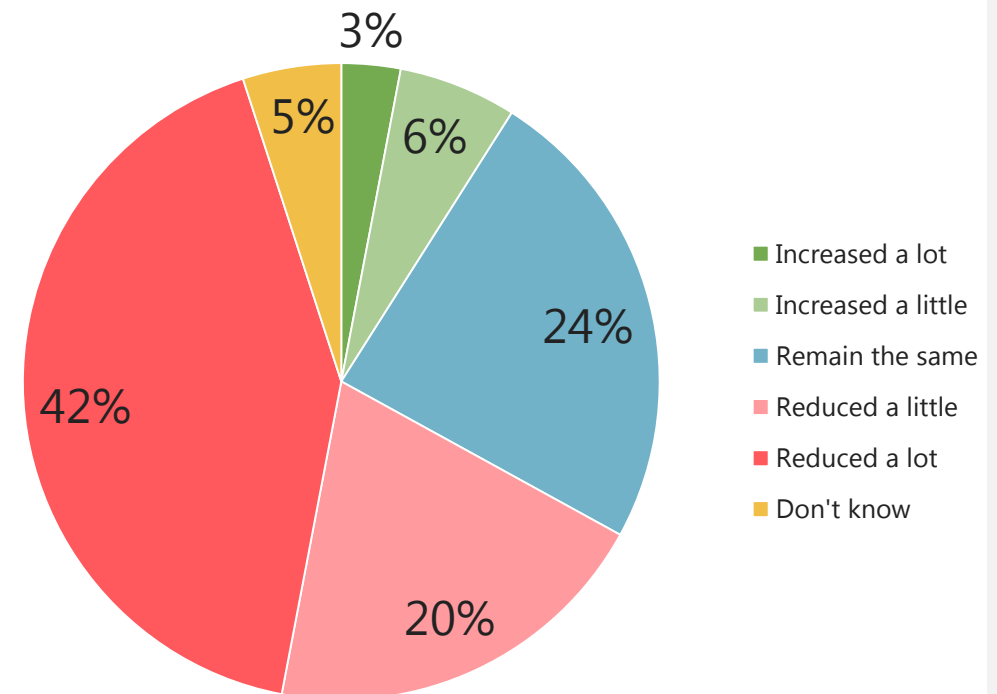
Do you think the number of immigrants coming to Britain nowadays should be increased a lot, increased a little, remain the same as it is, reduced a little, or reduced a lot?

43

2015

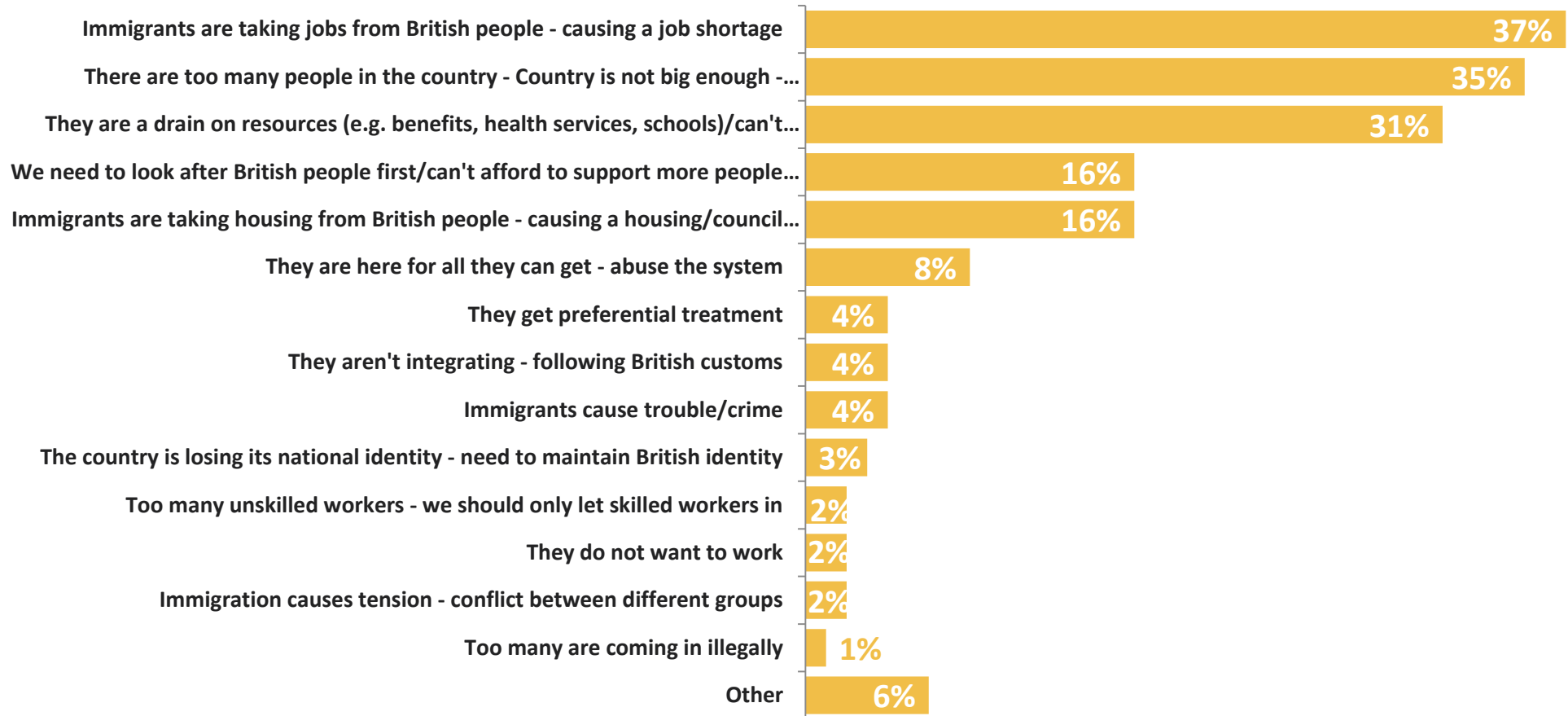


2016



Pressure on jobs, population and resources key concerns

And why do you think the number of immigrants coming to Britain nowadays should be reduced? Why else?

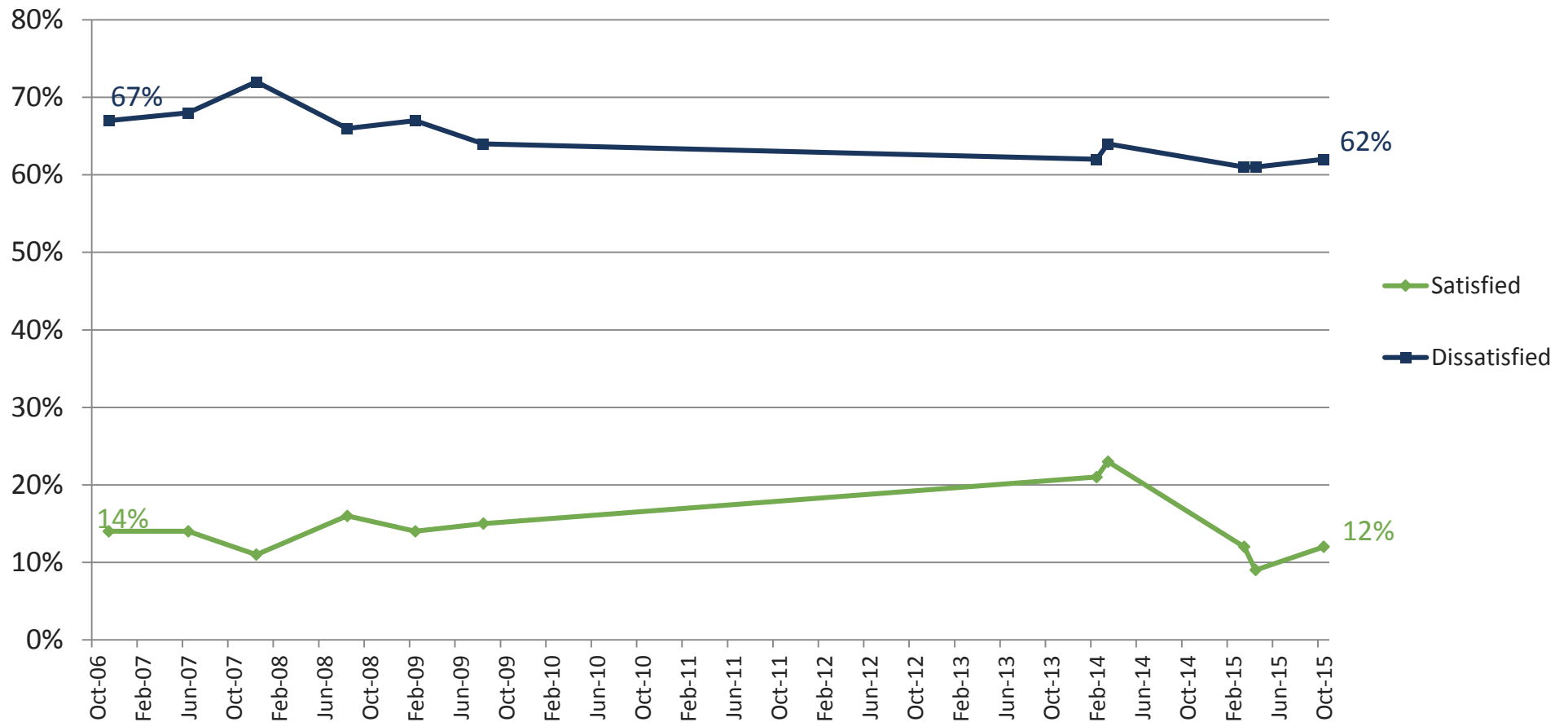


Base: all respondents who would like to see the number of immigrants coming to Britain reduce a lot or a little

Source: Citizenship Survey, 2010-11

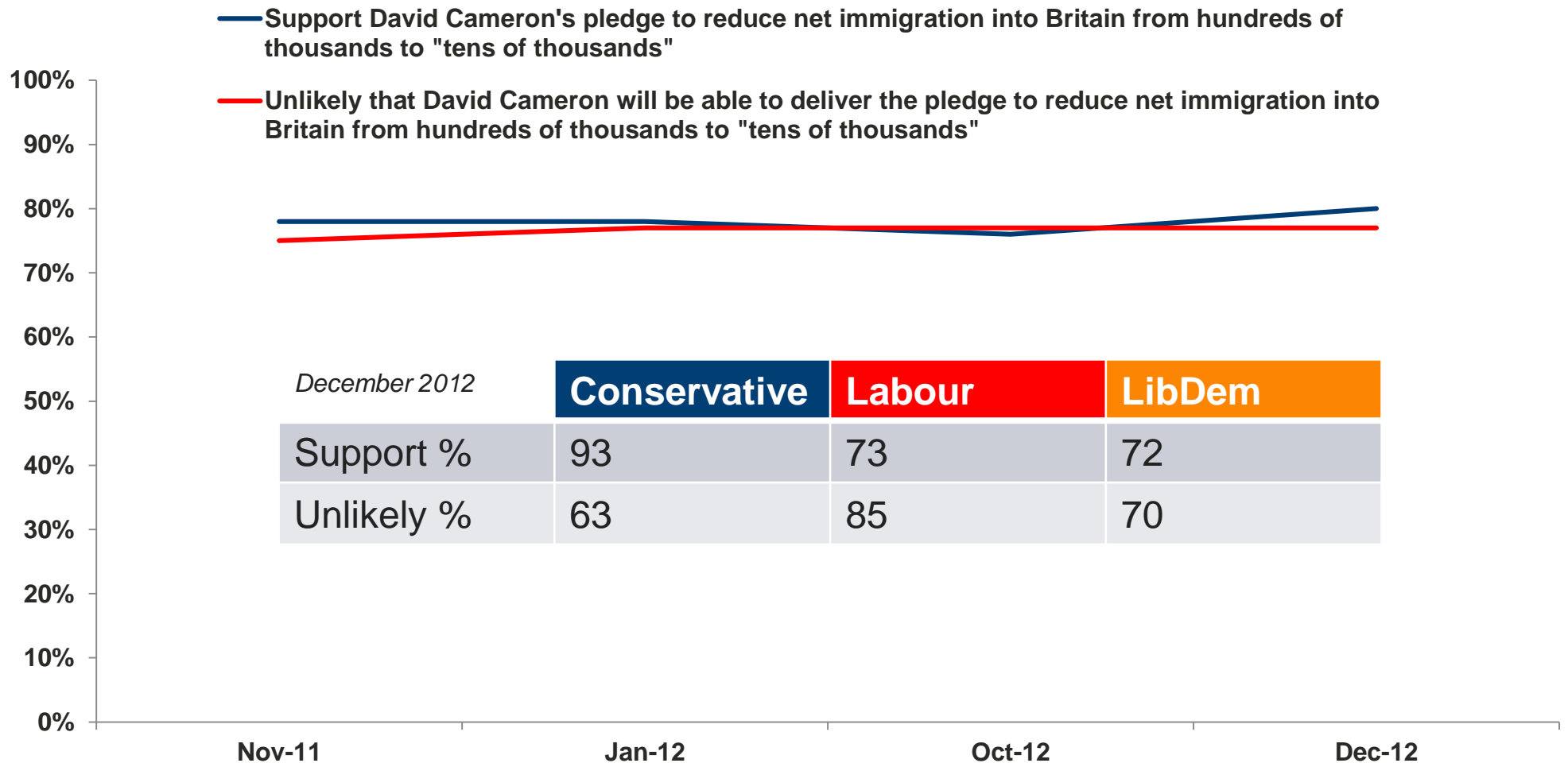
Public has been unhappy with how both Labour and Tories have handled immigration

Overall, how satisfied or dissatisfied are you with the way the current government is dealing with immigration?



Source: Ipsos MORI; nationally representative sample of British adults 16+ (Feb-Oct 2015)

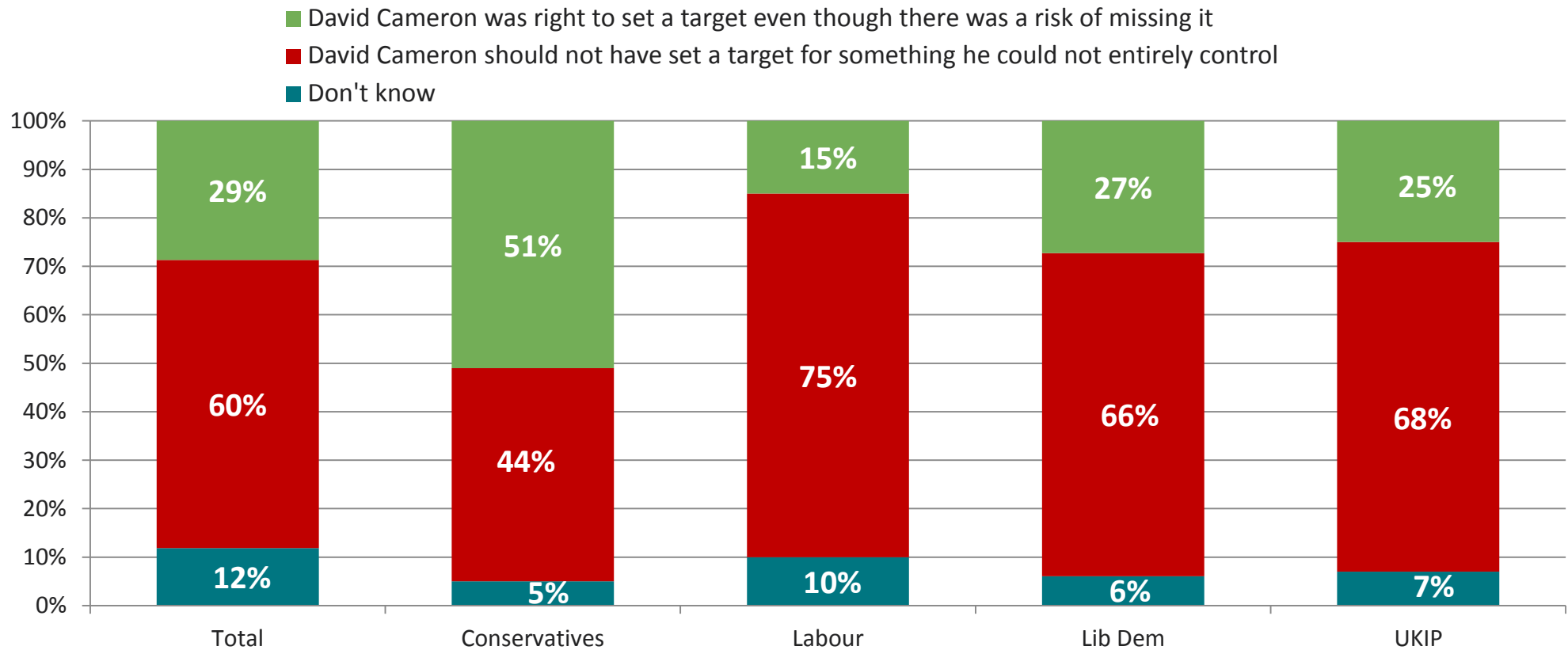
The public like targets but few think the government can deliver on them



Sources: YouGov/Sunday Times, November 2011, January 2012, October 2012, December 2012

And most think Cameron was wrong for promising a target during the last Parliament

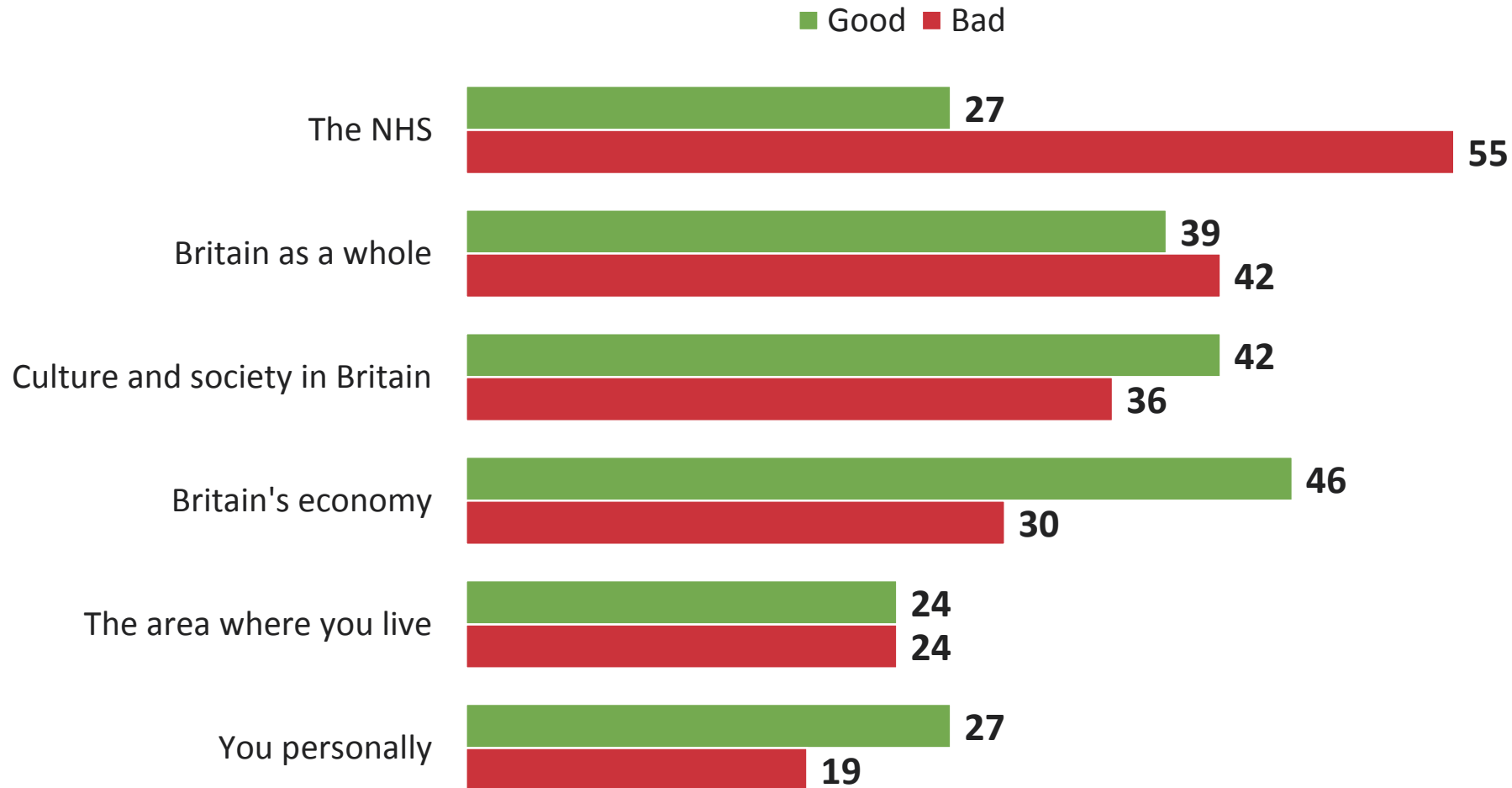
David Cameron pledged to reduce net immigration – the number of people coming in to Britain minus the number of people leaving Britain – to the tens of thousands per year by the end of the current Parliament. However, the most recent data shows net migration last year was 298,000. Which of the following statements do you most agree with?



Source: Ipsos MORI; nationally representative sample of 3,770 British adults 16+ (Mar-Apr 2015)

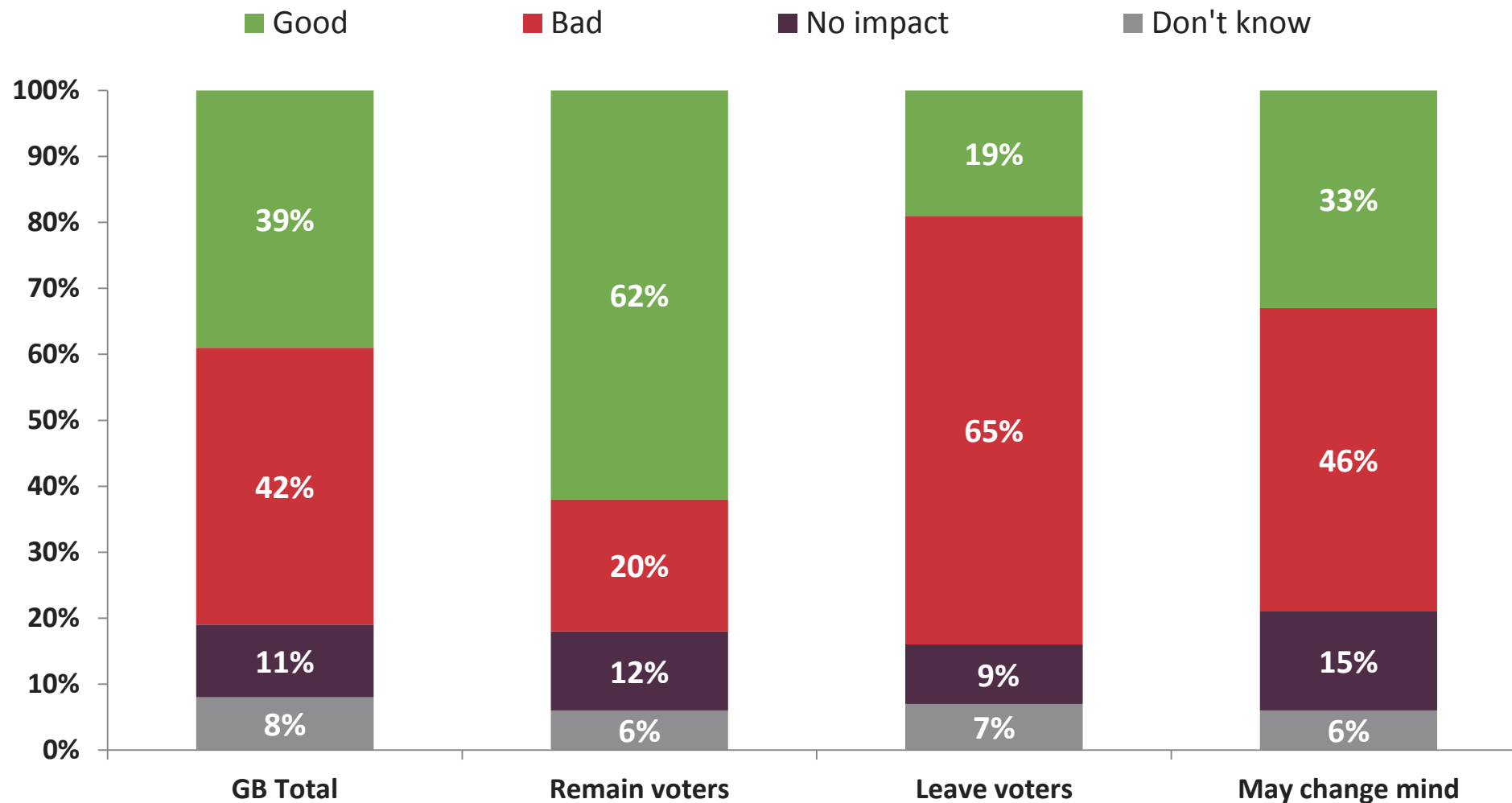
When it comes to EU immigration, a majority of Britons believe immigration has been bad for the NHS but are split when it comes to Britain as a whole, culture in Britain. Only one in five says it has affected them personally

Overall, would you say that EU immigration has been good or bad, or has had no impact on the following....



Over six in ten Leave voters thinks immigration has had a bad impact on Britain compared with one in five Remain voters

Overall, would you say that EU immigration has been good or bad, or has had no impact on the following...
Britain as a whole



Base: 1,257 GB adults, aged 18+, interviewed by telephone, FW 11-14 June 2016

Government and public services

THE AUSTERITY

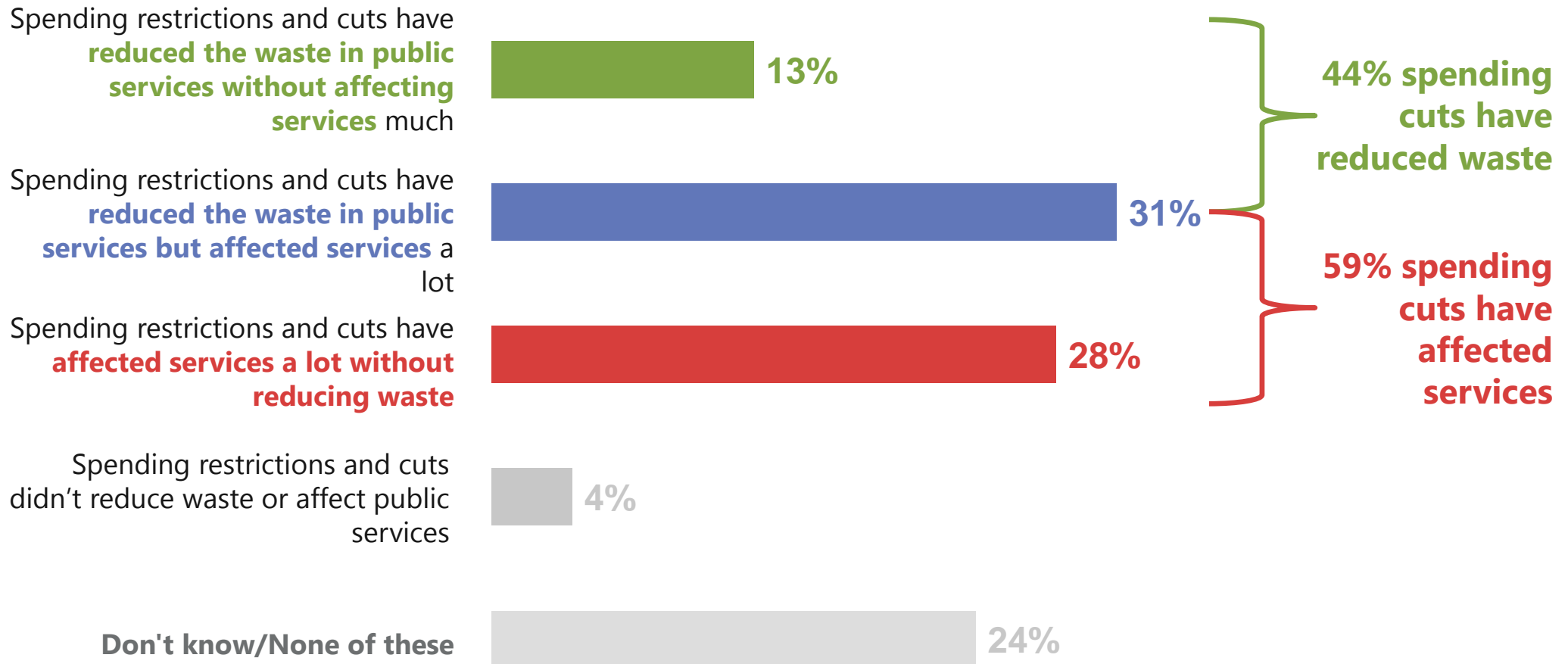
YEARS.



**WE DON'T LIKE IT, BUT ARE WE
LEARNING TO LIVE WITH IT?**

Many people accepted the need for cuts

AS YOU MAY KNOW THERE HAVE BEEN A RANGE OF SPENDING RESTRICTIONS AND CUTS ON PUBLIC SERVICES UNDER THE COALITION GOVERNMENT, WHICH OF THE FOLLOWING BEST REFLECTS YOUR VIEW?



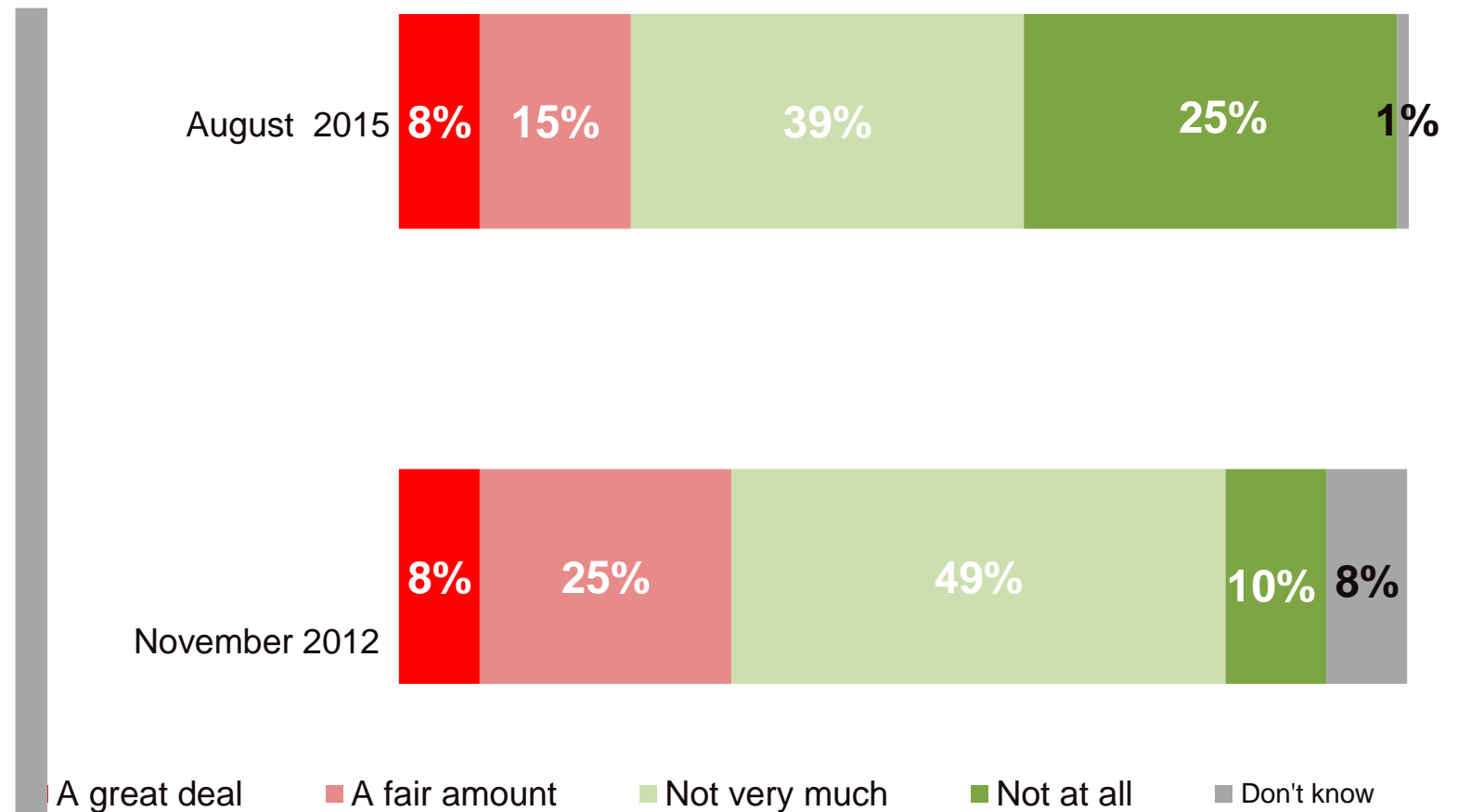
Base: 2,024 online British adults aged 18-75, 24-28 April 2015

Source: Ipsos MORI/Policy Network

2015 saw signs of people getting used to austerity, but will it last or will we reach a tipping point?

Q

As you may know, the government has announced a number of spending cuts to help reduce the national deficit. To what extent, if at all, have you and your family been affected by the cuts so far?



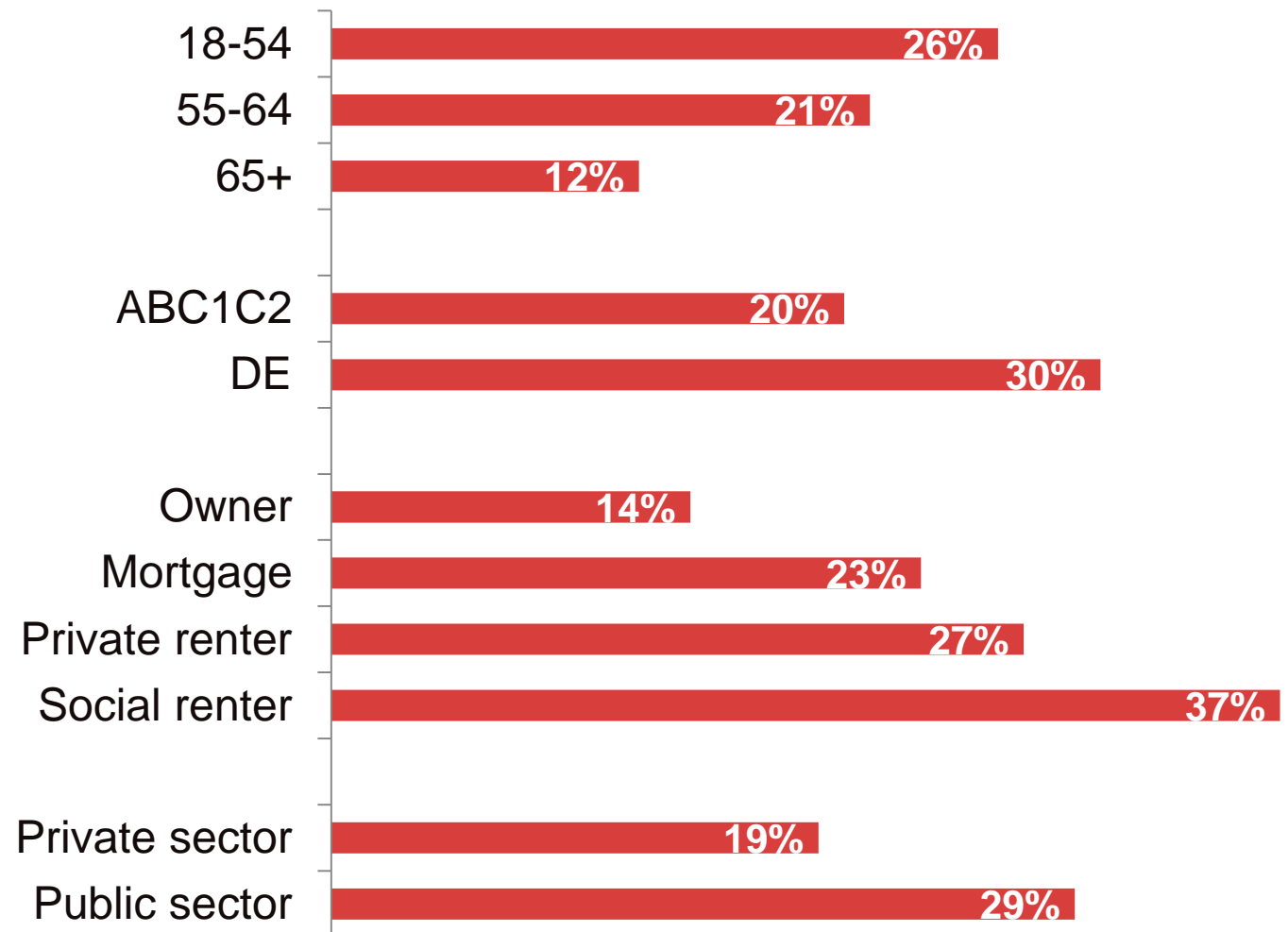
BASE@ C1,000 ADULTS 18+

DEs, renters, and public sector workers most feeling the pinch – older people the least

Q

As you may know, the government has announced a number of spending cuts to help reduce the national deficit. To what extent, if at all, have you and your family been affected by the cuts so far?

% affected a great deal/fair amount



BASE: 1,001 BRITISH ADULTS 18+ AUGUST 2015

Weakening belief that cuts are necessary

To what extent do you agree or disagree with the following statements?

“I think cuts to welfare and benefits have gone too far”



“I think reductions to social welfare benefits have been necessary”



■ Agree ■ Disagree

Base: 1,006 British adults 18+, 11th – 13th September 2015

In 2015 people thought only 28% of planned cuts had been made – less than they thought in 2012

And what proportion of the government's planned cuts to public spending do you think have been carried out so far?

November 2012



August 2015



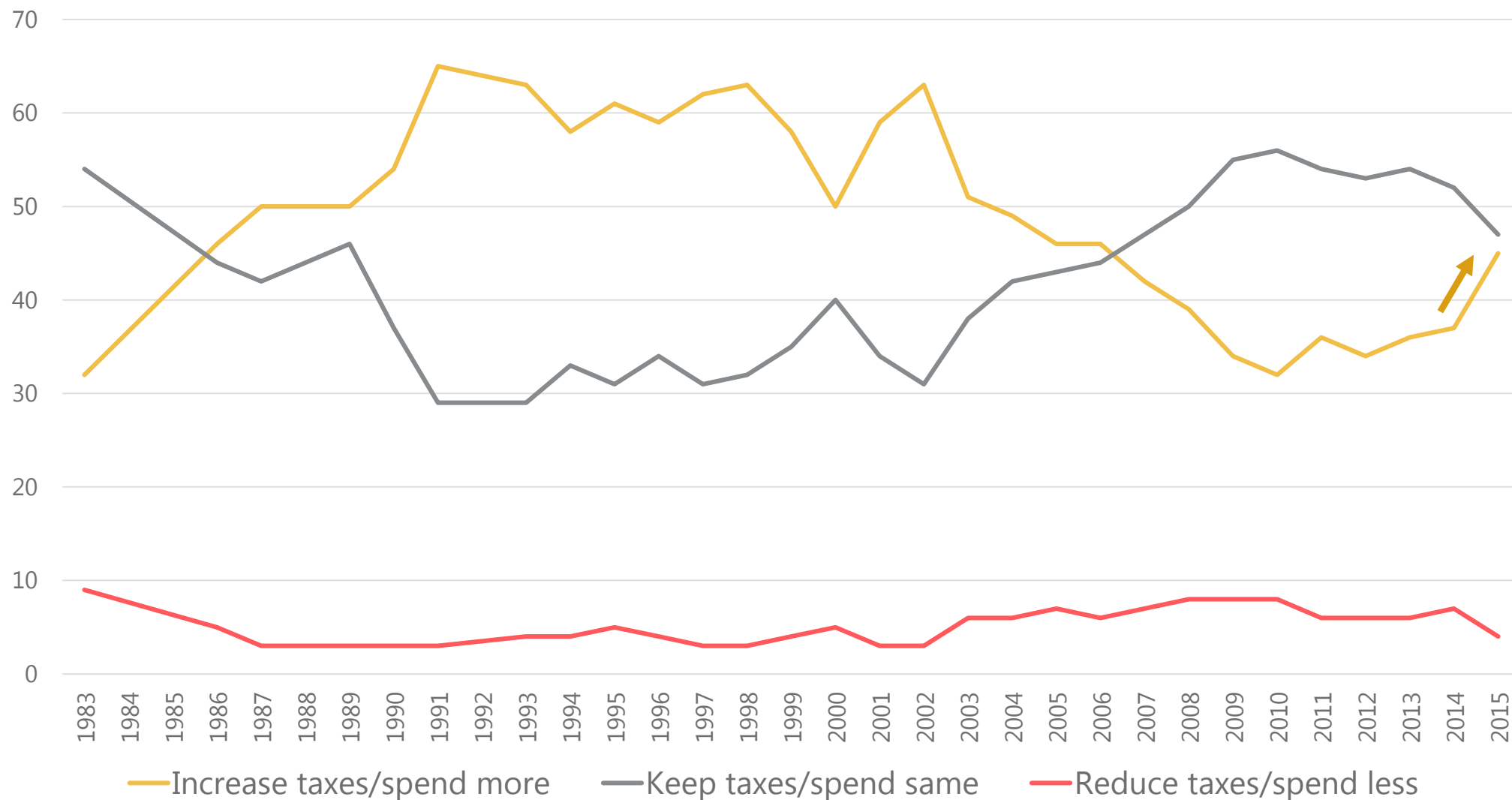
As clearly more cuts have been carried out in the intervening years (although it is difficult to give comparable figures on this as plans change over time) this does suggest that expectations of cuts and austerity as ongoing features of public spending are becoming more strongly held (although note there are some methodological differences - 2012 survey was carried out online among 16-75 year olds).

Base: 1,001 British adults 18+, 8th – 11th August 2015

Source: Ipsos MORI

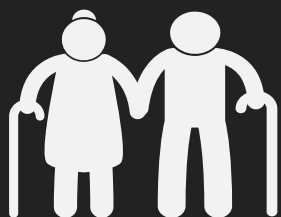
And has been a move back towards support for more spending in latest British Social Attitudes study

As you may know there have been a range of spending restrictions and cuts on public services under the coalition government, which of the following best reflects your view?

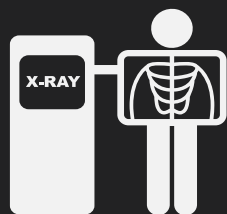


ALTHOUGH WE ARE WRONG ON
ACTUAL LEVELS OF PUBLIC SPENDING

**WE UNDERESTIMATE THE EXTENT OF CUTS TO
HOUSING, EDUCATION, TRANSPORT & POLICING
BUT DON'T APPRECIATE THE INCREASES
AWARDED TO PENSIONERS AND THE NHS.**



AVERAGE GUESS **2% CUT** OVER 5 YEARS
ACTUAL **13% INCREASE** IN REAL TERMS



AVERAGE GUESS **3% CUT** OVER 5 YEARS
ACTUAL **4% INCREASE** IN REAL TERMS

MANY SERVICES

HOLDING UP

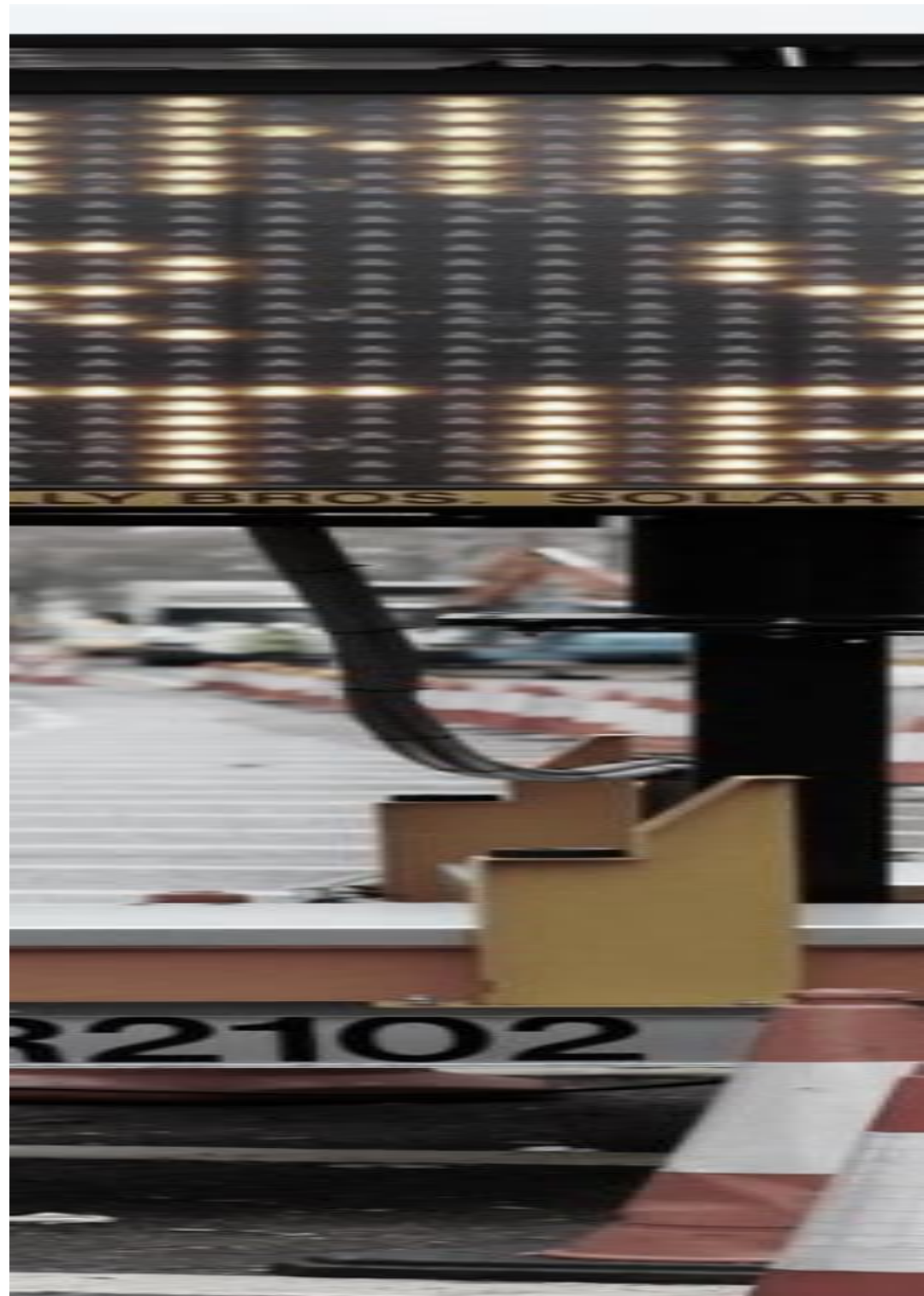
SURPRISINGLY

WELL.

- Most still satisfied with many local services, and with their own GP/NHS hospital.
- In some cases even improvements in perceptions.
- But could awareness of austerity be having an impact on lowering expectations?

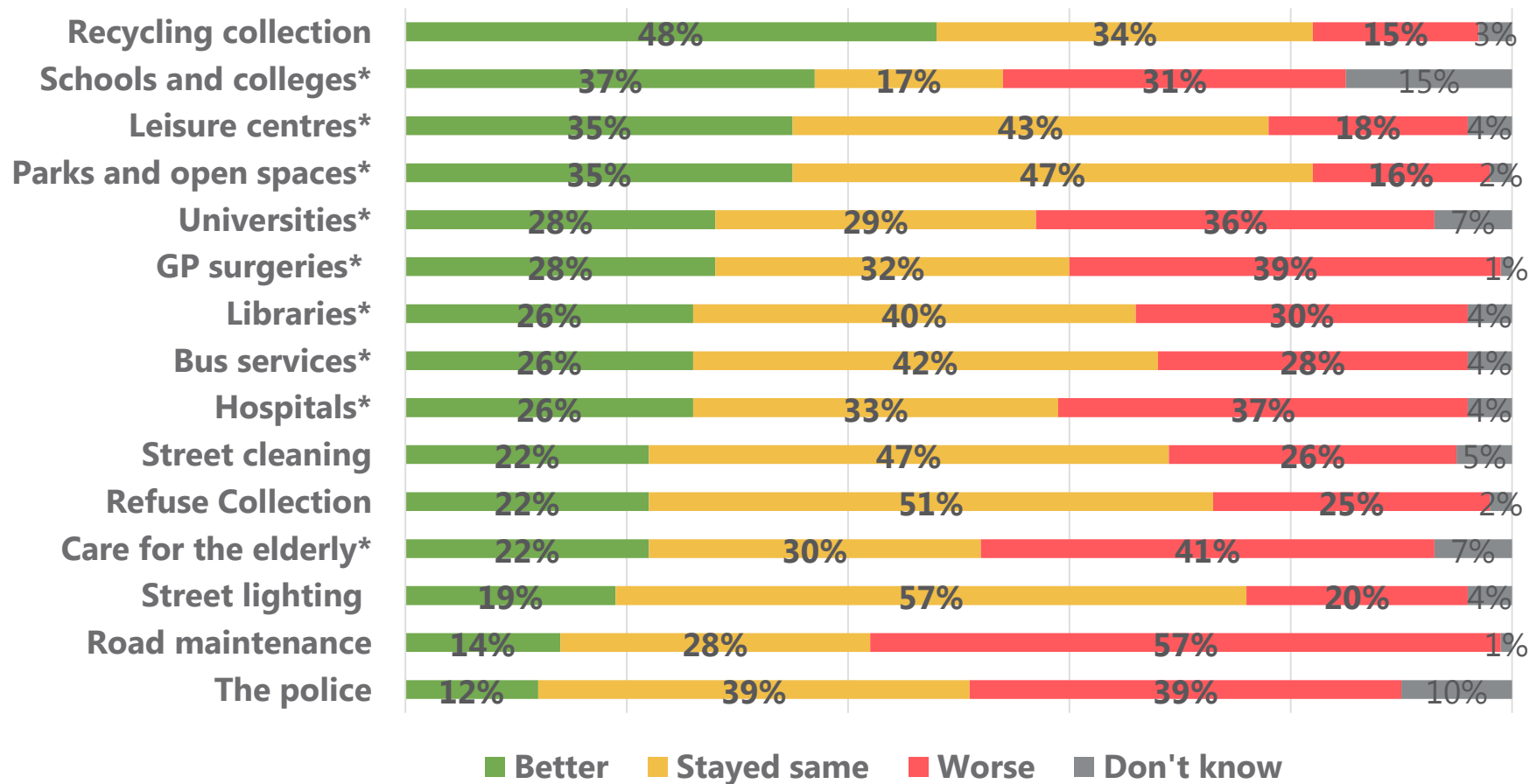


Ipsos MORI



Only minority think many services are actually getting worse

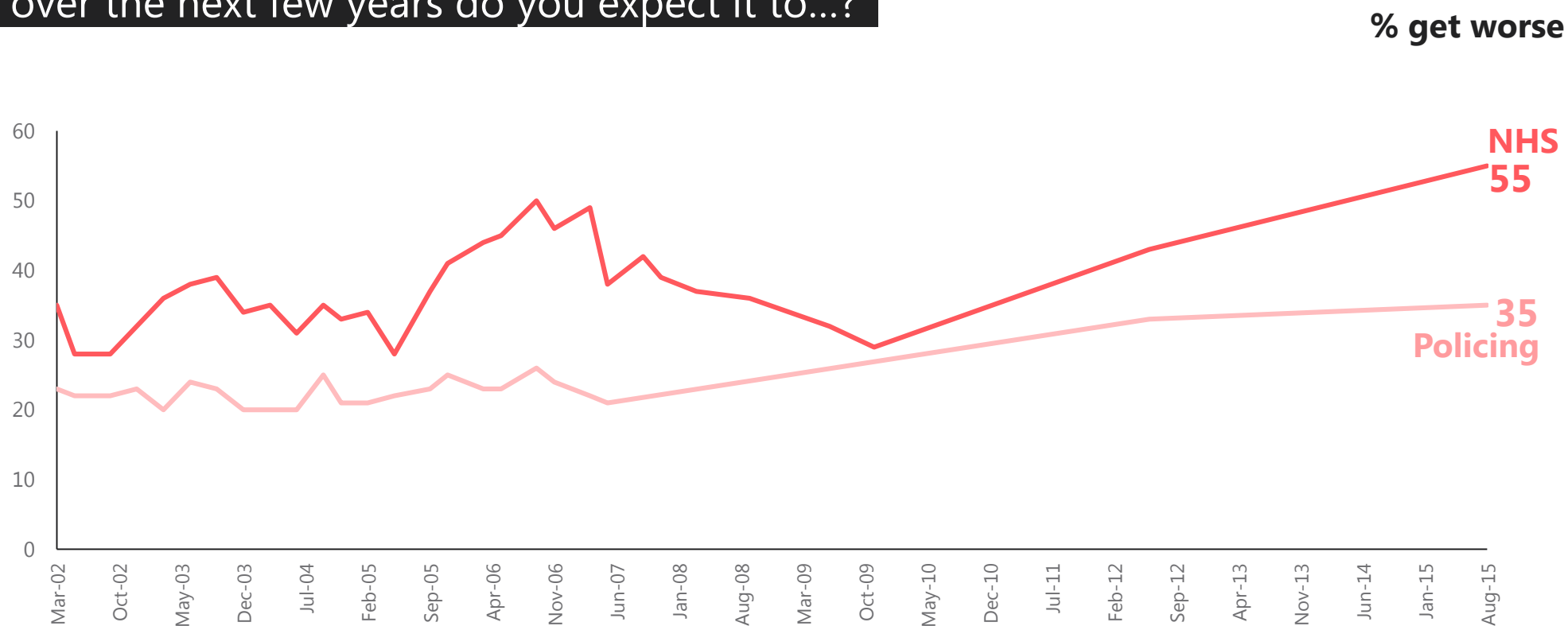
Do you think [each service] has got better or worse in the last five years, or has it stayed the same? Is that much or a little better/worse?



Base: 1,001 British adults 18+, 8th – 11th August 2015, and 11th – 13th September 2015.
 *= Based on all whose household uses or benefits from service

But big increases in concern for the future of the NHS and policing

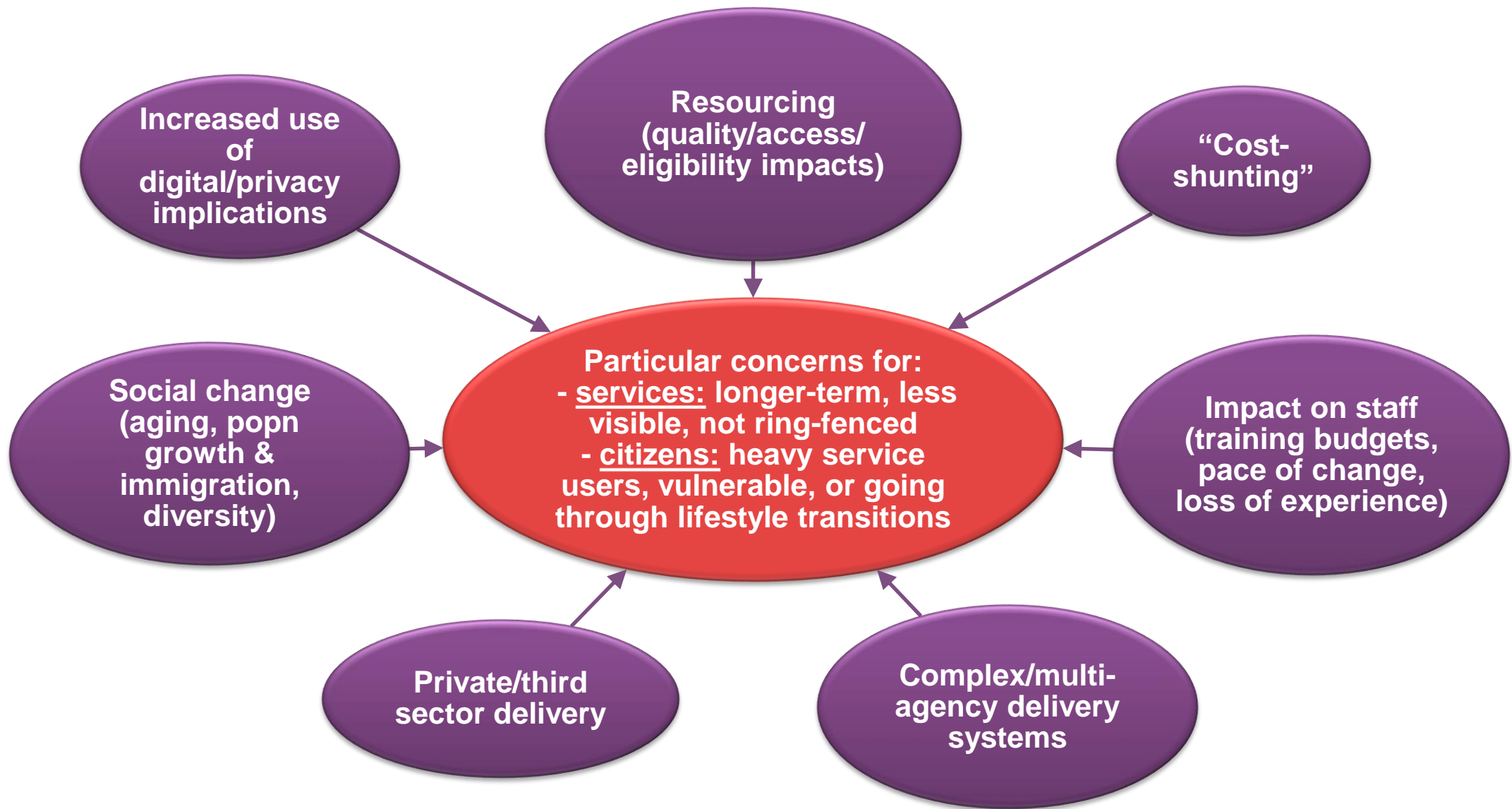
Thinking about the quality of the NHS/the way your area is policed
over the next few years do you expect it to...?



Base: c.1,000 British adults each month

Source: Ipsos MORI

And real concern about how services will deal with future risks



Public service leaders say easy changes already made, so looking ahead, challenges even greater

More radical approaches require new skills, political will or difficult conversations with users.....



Stop delivering some services



Work in partnership with other sectors more



Cut more staff (including frontline)



Commission more services



Make better use of technology



Enable communities to do more for themselves



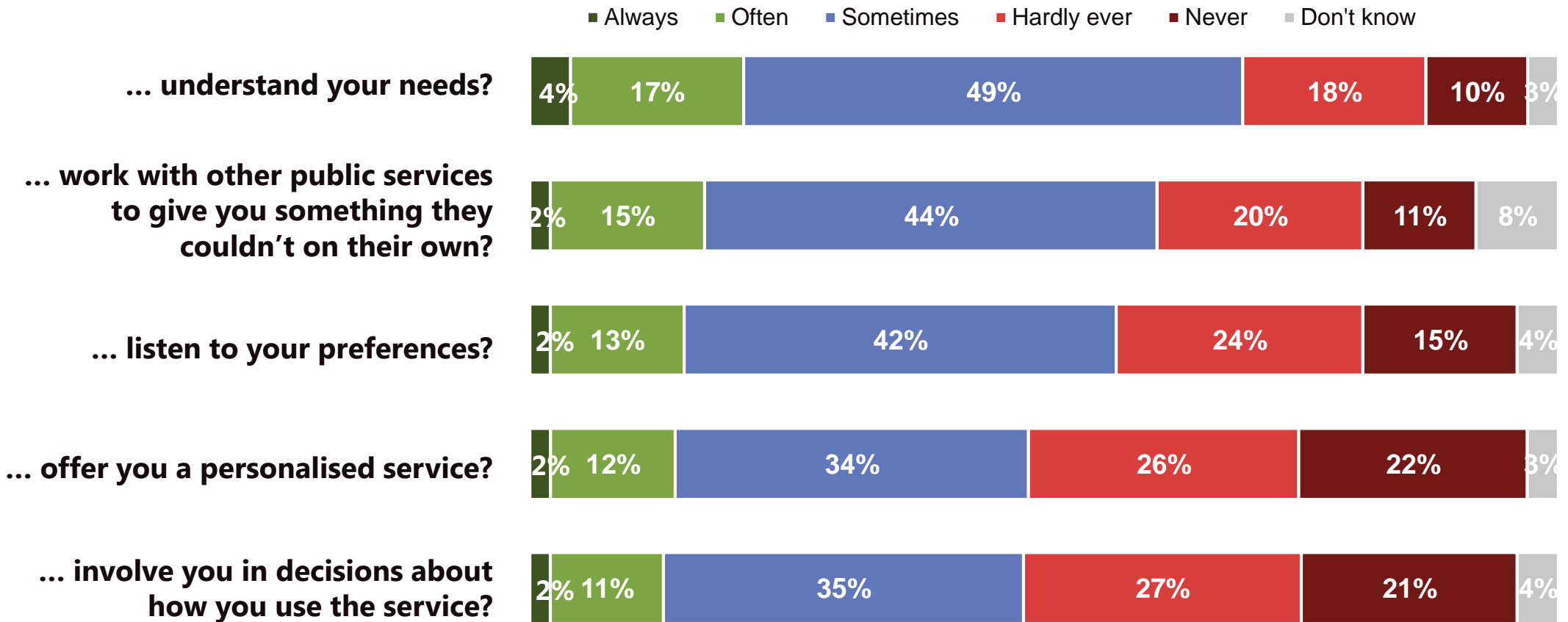
Make better use of staff through more flexible contracts



Enable other providers to do more

Even though 76% say how they are treated is as important as final outcome, still a long way to go to make public services truly customer-focussed

How often, if at all, do you think organisations that deliver public services...?



Base: 1,007 British adults 15+; 10-16 July 2015

Source: Ipsos MORI

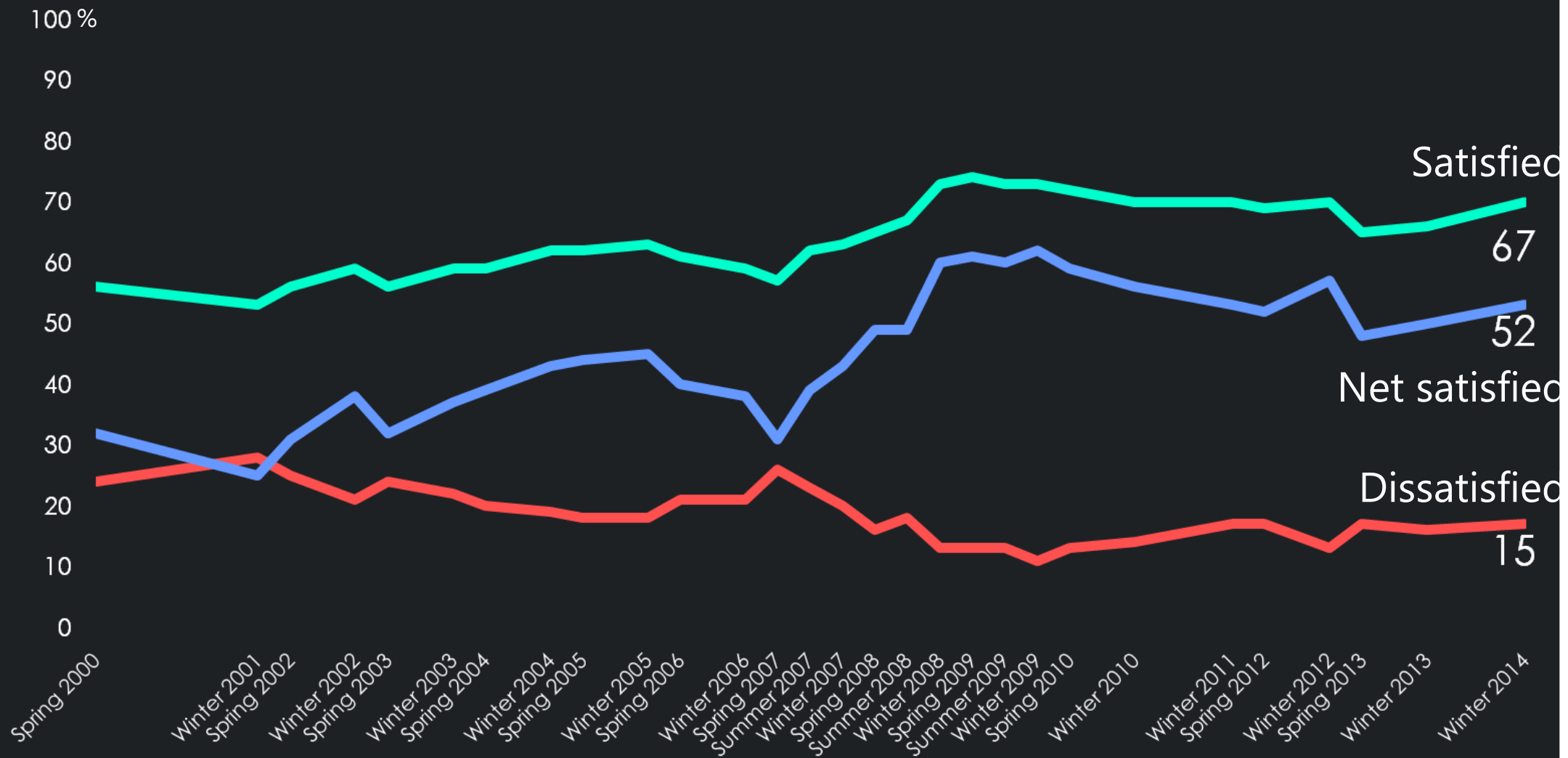
What does this all mean for public services?

- Public services still central to Britons' values and worldview in difficult times
 - Particularly core services (health, education, police)
 - Equal access and consistency in standards key values – but fairness means different things to different people
- High expectations but no-one thinks services are or will be perfect
 - Many have frustrations around customer service, inefficiencies, management while distrust in politicians also creates scepticism
 - Openness to doing things differently – but risk-averse, need reassurance, and safeguards in place
- So far many yet to feel that cuts have hit service quality – but real concerns about future challenges
 - Can public services continue to adapt and evolve before hitting a tipping point?



What are public perceptions of the NHS?

Satisfaction with the running of the NHS remains high



Overall how satisfied or dissatisfied are you with the running of the National Health Service nowadays?

Base: Adults aged 16+ in England (c. 1000 per wave)

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

...though some groups are more likely to be dissatisfied

Overall

55-64

LTI

Informal carers

15%

24%

24%

22%

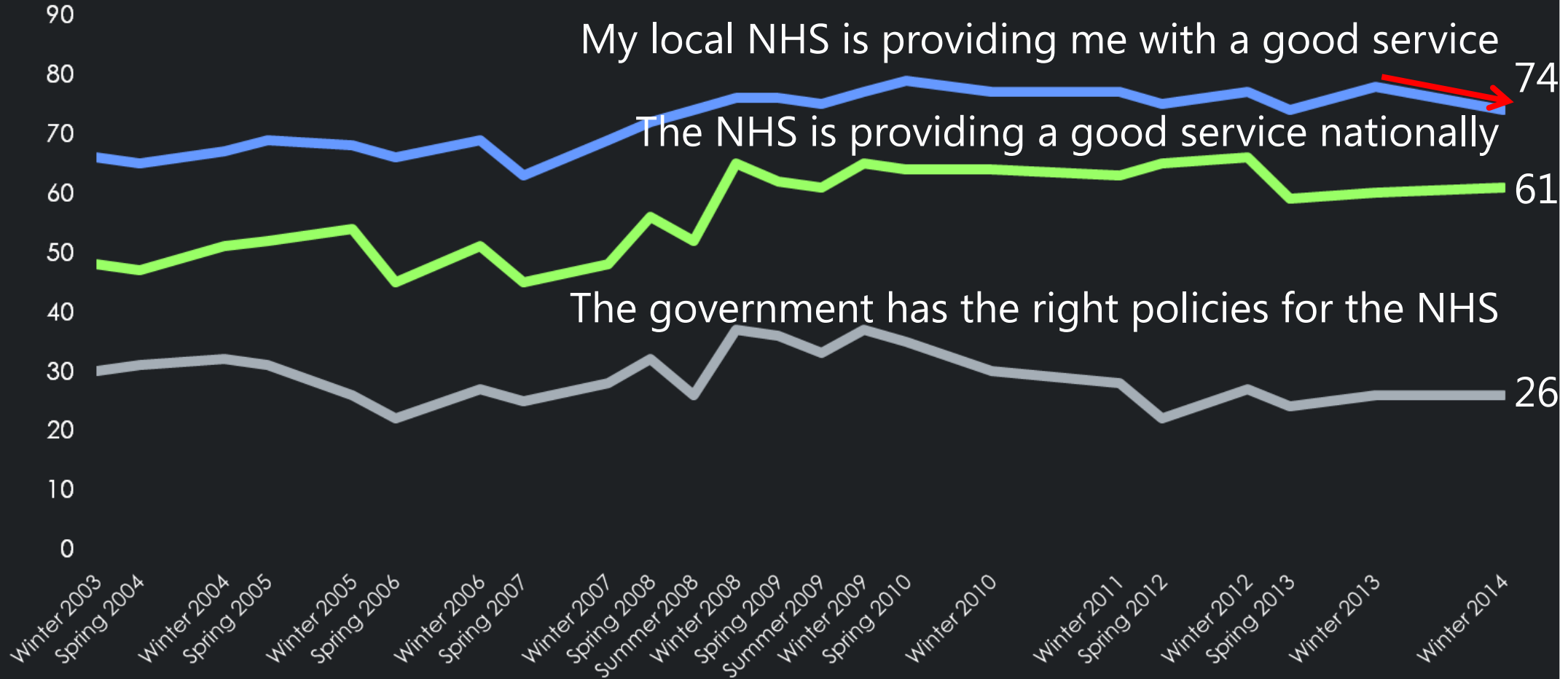
Overall how satisfied or dissatisfied are you with the running of the National Health Service nowadays?

Base: Adults aged 16+ in England, Winter 2014 (1016)

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

Perceptions of local services remain more positive than the NHS nationally, or government policy

100 % agree



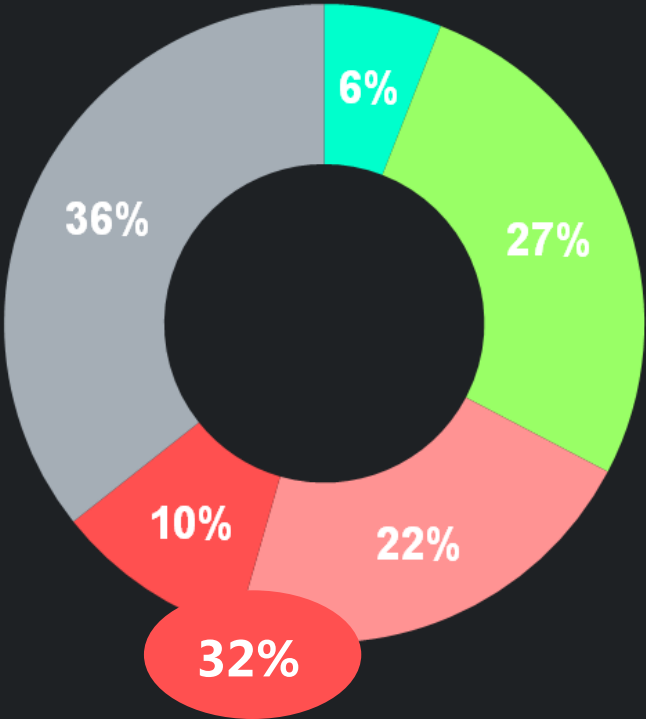
To what extent, if at all, do you agree or disagree with the following statements?

Base: Adults aged 16+ in England (c. 1000 per wave)

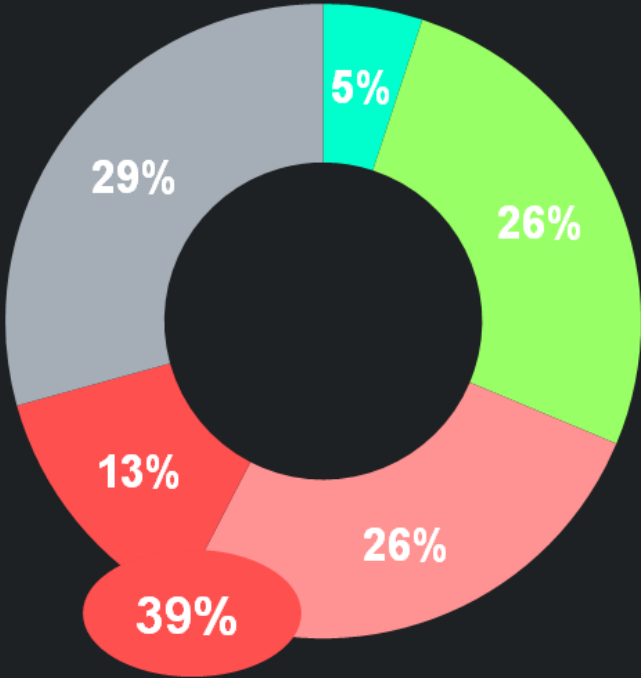
Source: Ipsos MORI/DH Perceptions of the NHS Tracker

And there is increasing concern about local care for those with mental health conditions

Spring 2013



2014



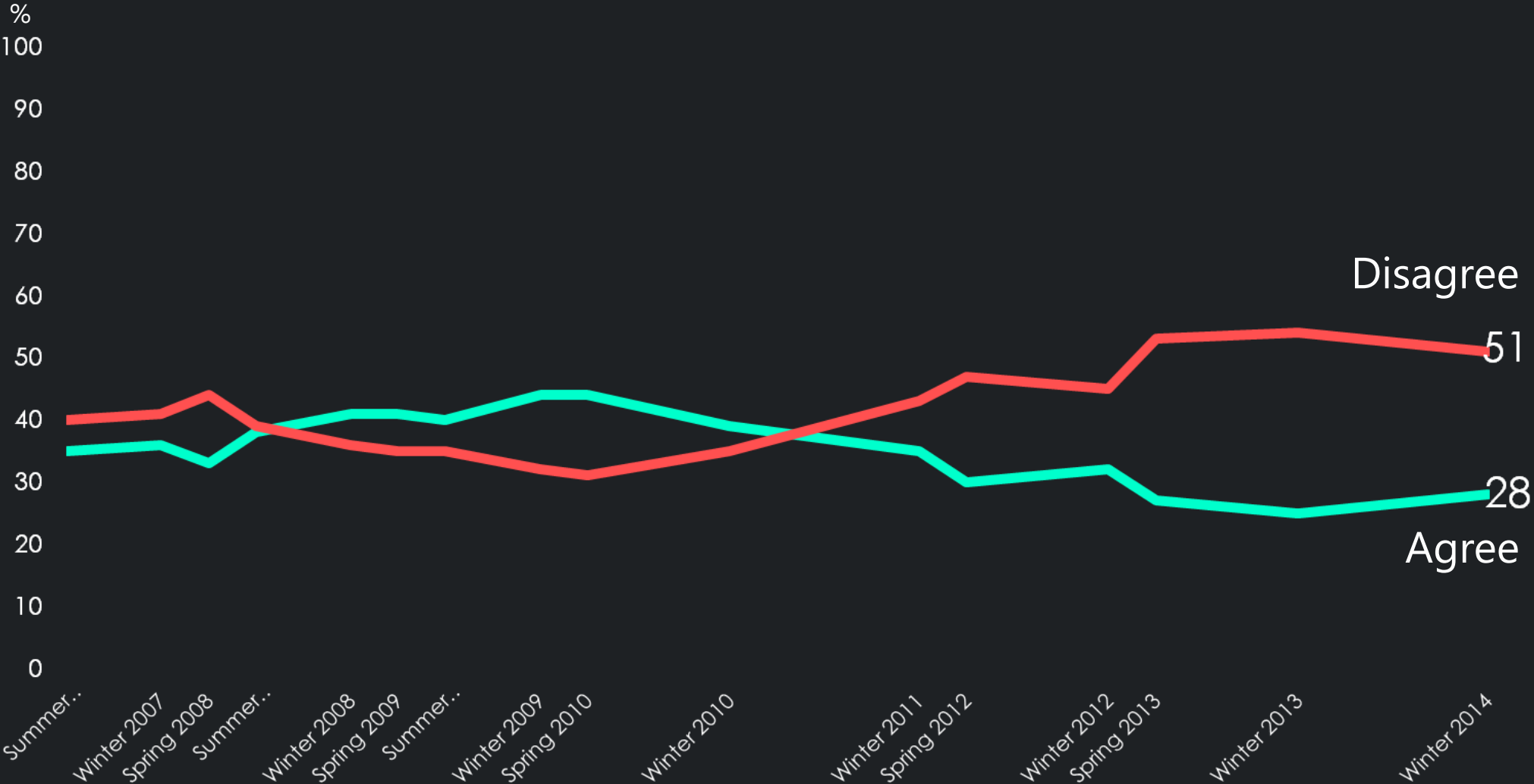
Very well | Quite well | Not very well | Not well at all | Don't know

How well do you feel that these groups are currently cared for by the NHS in your local area?

Base: Adults aged 16+ in England (c. 1000 per wave)

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

The decline in perceptions of waiting times has stabilised (though remains low)

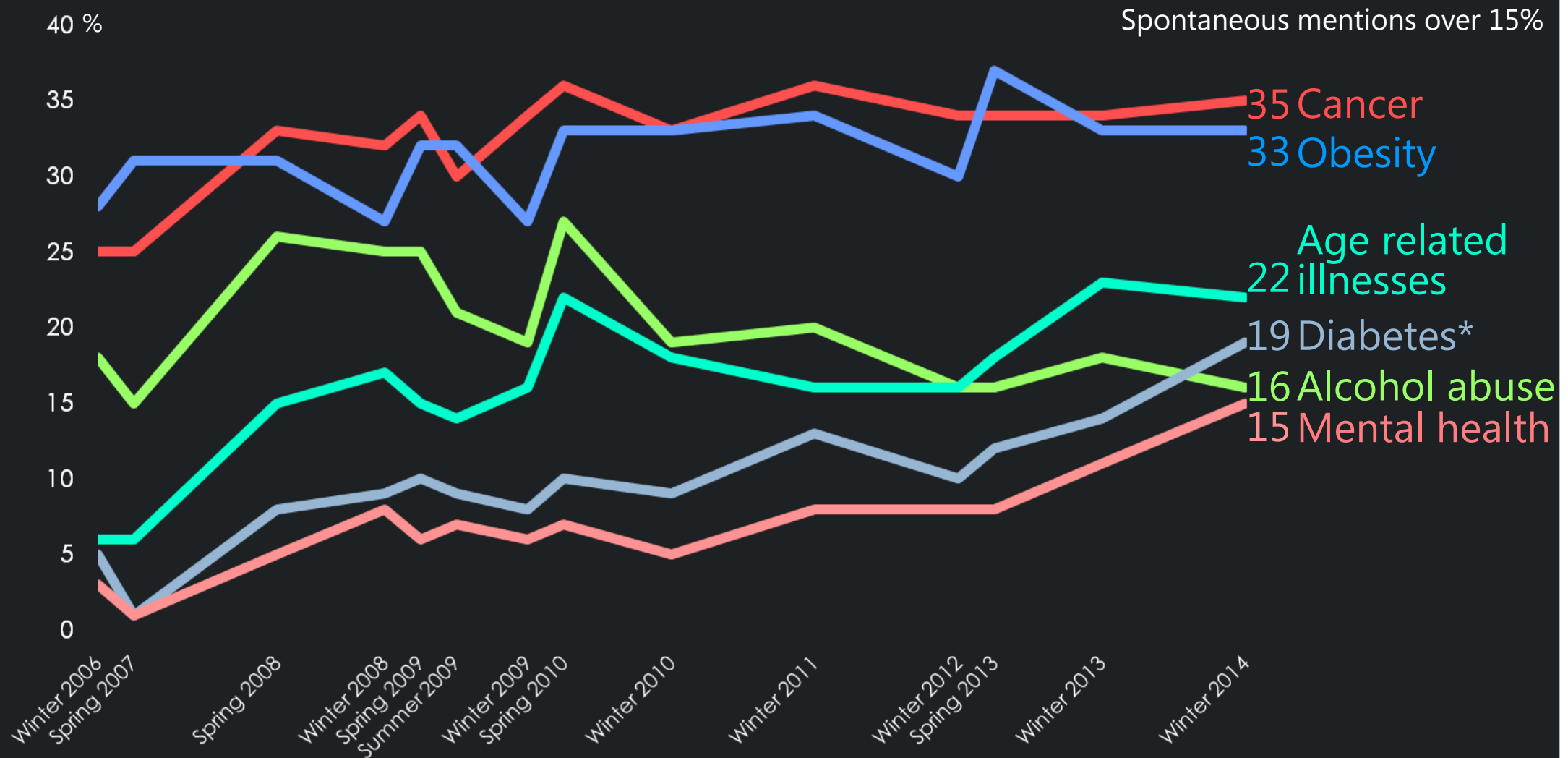


Please tell me whether on the whole you agree or disagree with each of the following statements...
NHS waiting times for non-emergency treatment and care are getting shorter

Base: Adults aged 16+ in England (c. 1000 per wave)

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

Cancer and obesity remain the public's biggest perceived health problems, while there is increasing concern around diabetes and mental health



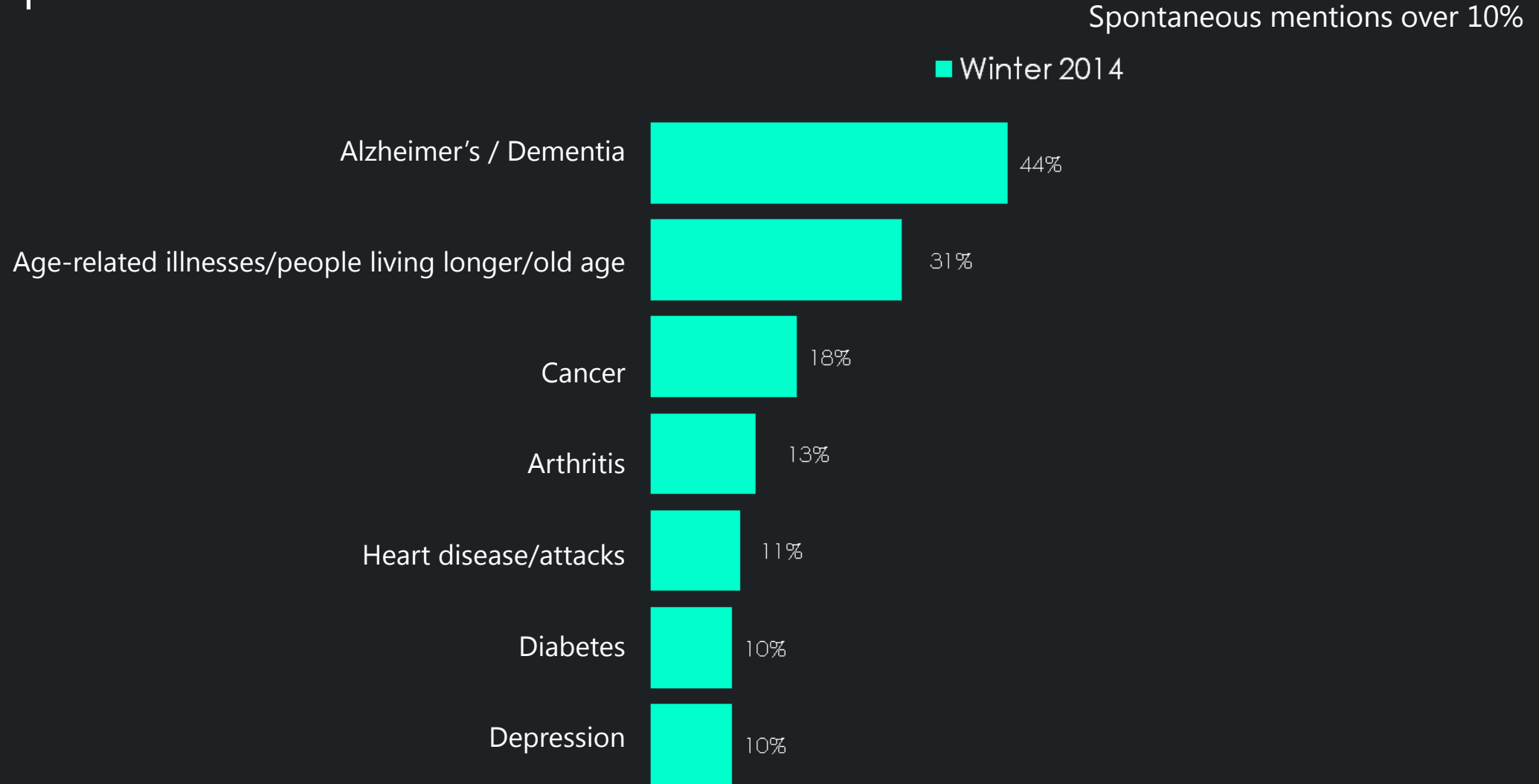
Thinking generally, what are the biggest health problems facing people today? What else?

Respondents are able to give more than one answer at this question.

Base: Adults aged 16+ in England (c. 1000 per wave)

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

And dementia and depression are seen as rising concerns facing older people



What are the biggest health problems facing older people today? What else?

Respondents are able to give more than one answer at this question.

Base: Adults aged 16+ in England (c. 1000 per wave)

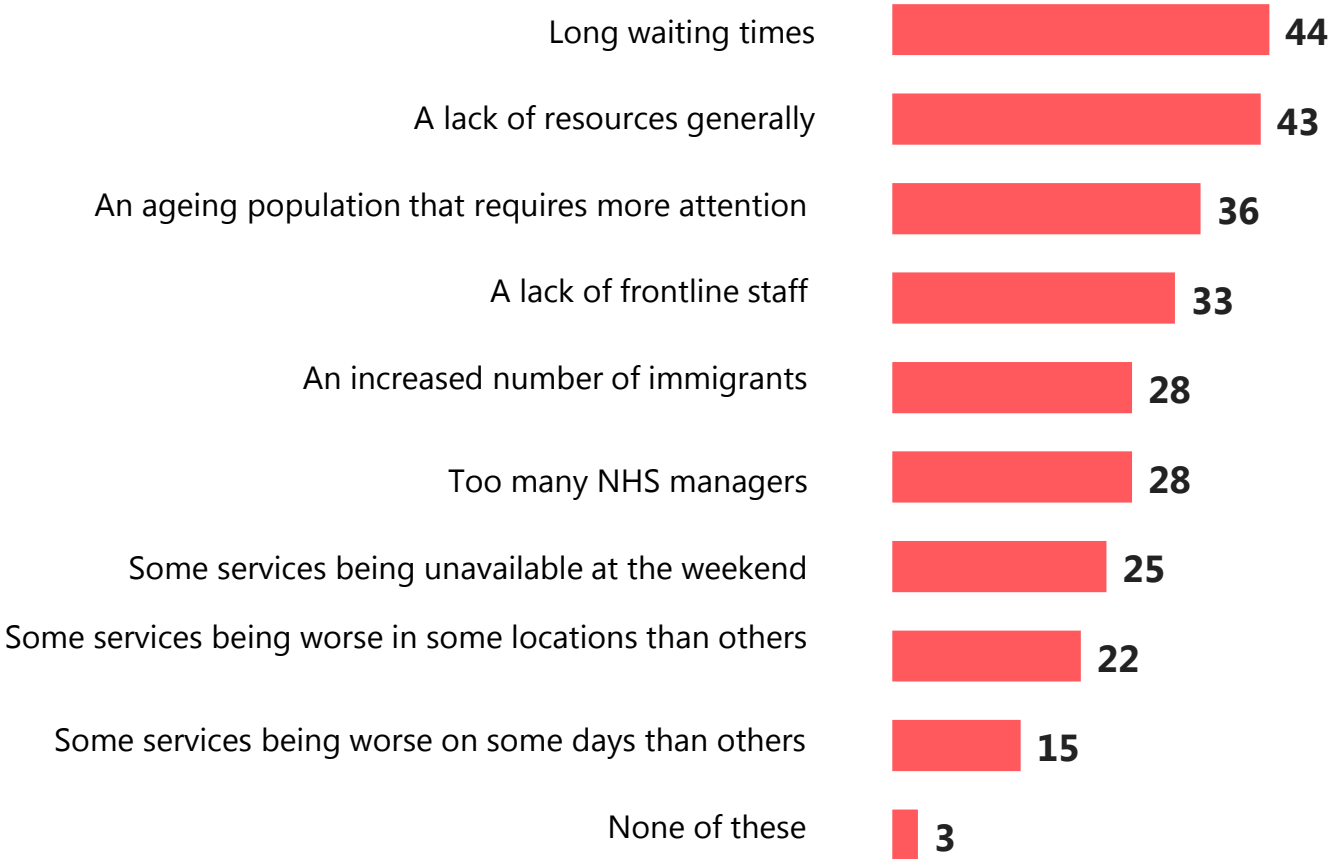
Source: Ipsos MORI/DH Perceptions of the NHS Tracker

**What about seven
day services?**



Public concern about seven day services is low compared with other issues in the NHS

Overall, which of the following, if any, do you see as the biggest problems facing the NHS?

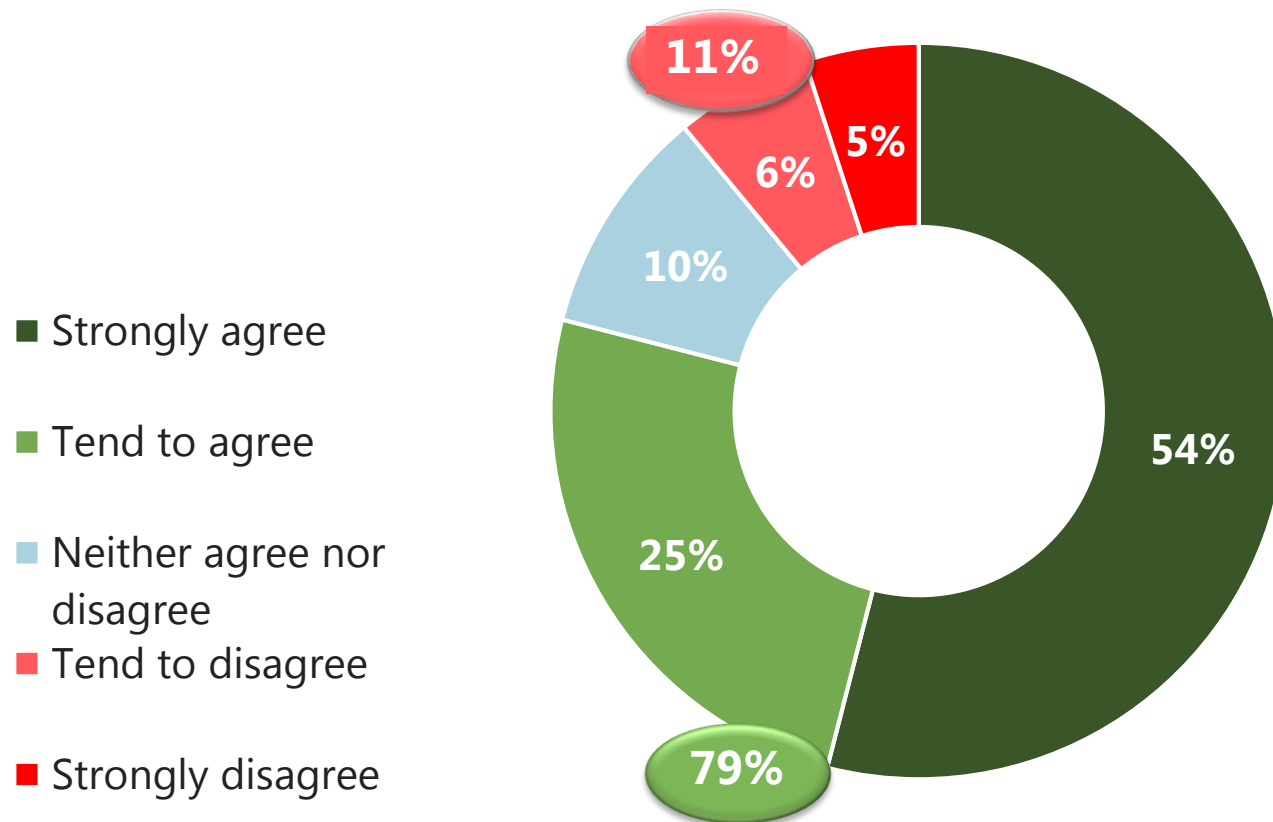


Base: 1,123 adults in England, aged 16+, percentages sum to greater than 100 due to respondents being able to give more than one response

But when presented with the option – they do want standard of service to be guaranteed at the weekend

Please tell me to what extent you agree or disagree with the following statement:

The NHS should provide the same standard of service to patients at the weekend as during the week

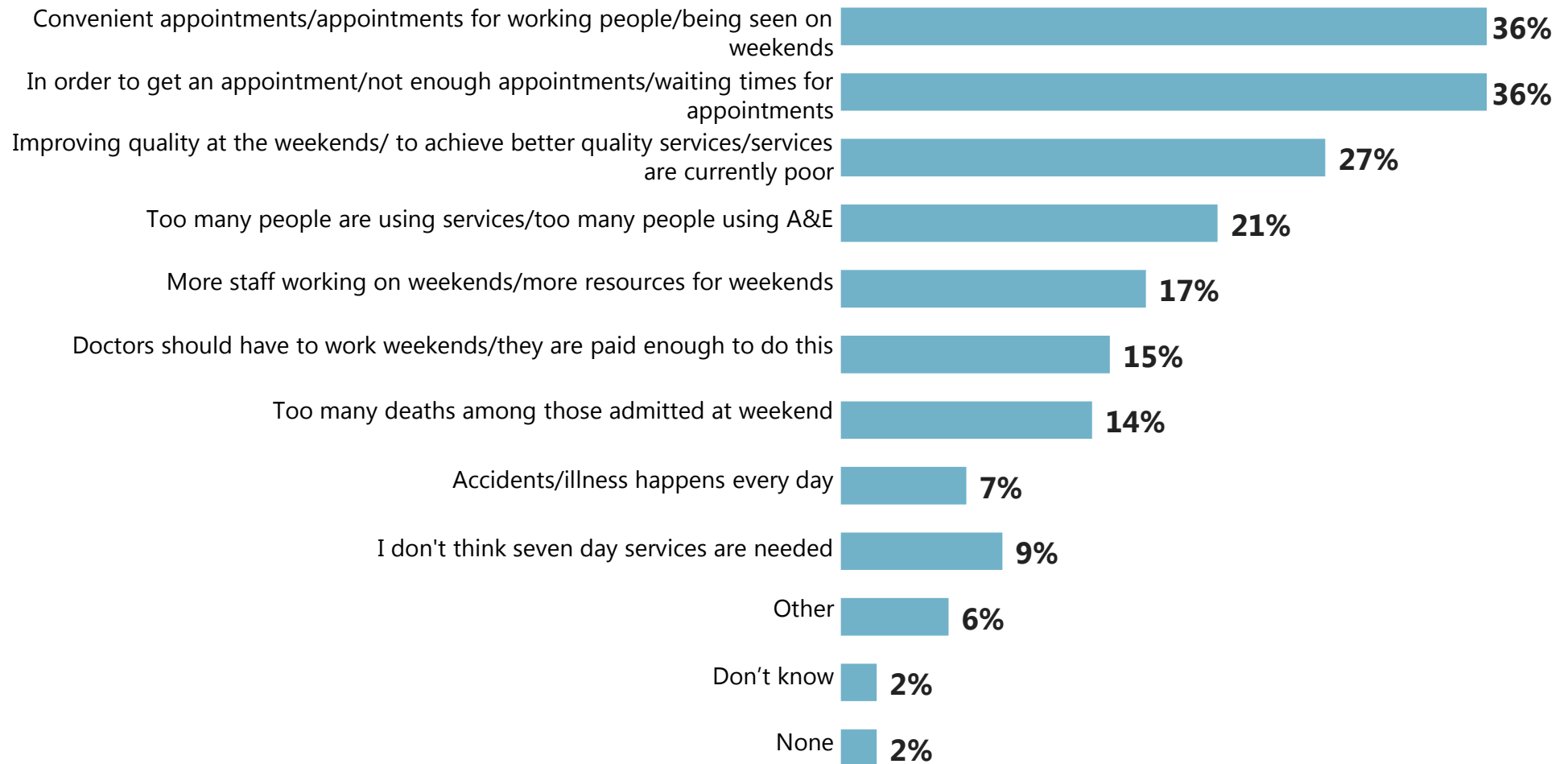


Base: 1,123 adults in England, aged 16+

Source: Ipsos MORI

While quality is seen by some as a reason for seven day services, most think that it's just a way of getting appointments on tap

The government is proposing seven day health services for the NHS. For what reasons, if any, do you think this might be needed? If you don't think this needed, please say so (unprompted)



Base: 1,123 adults in England, aged 16+, percentages sum to greater than 100 due to respondents being able to give more than one response

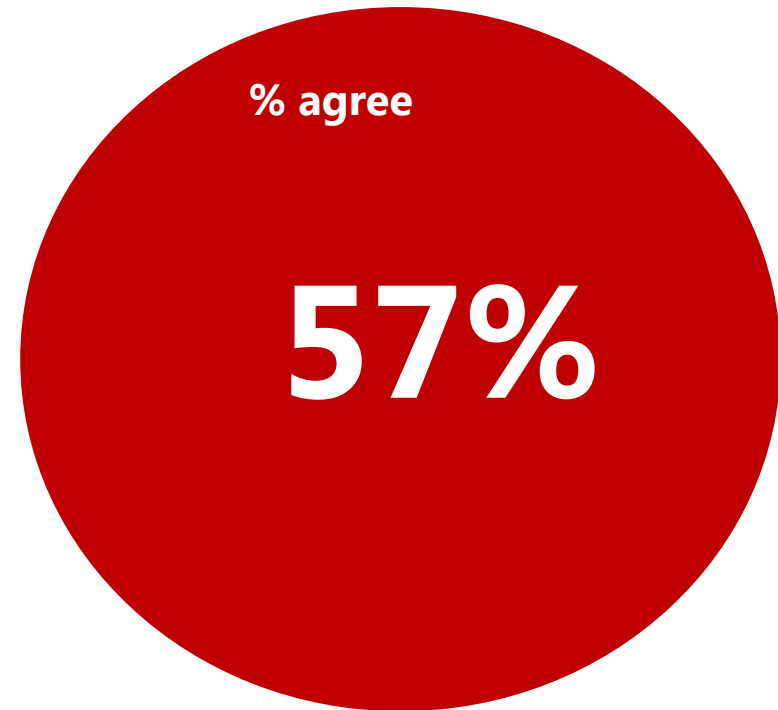
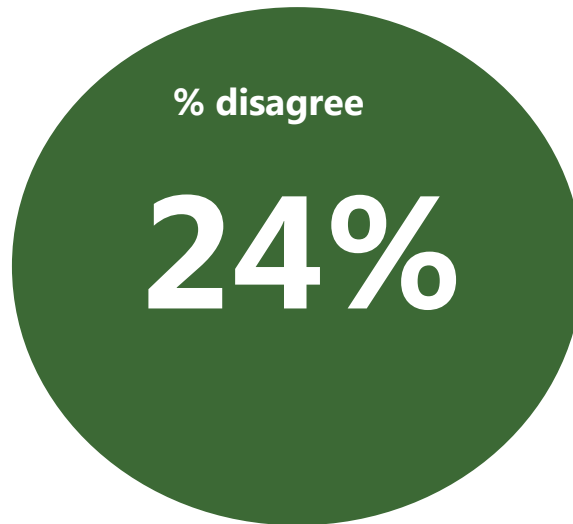
Source: Ipsos MORI

The economy and infrastructure



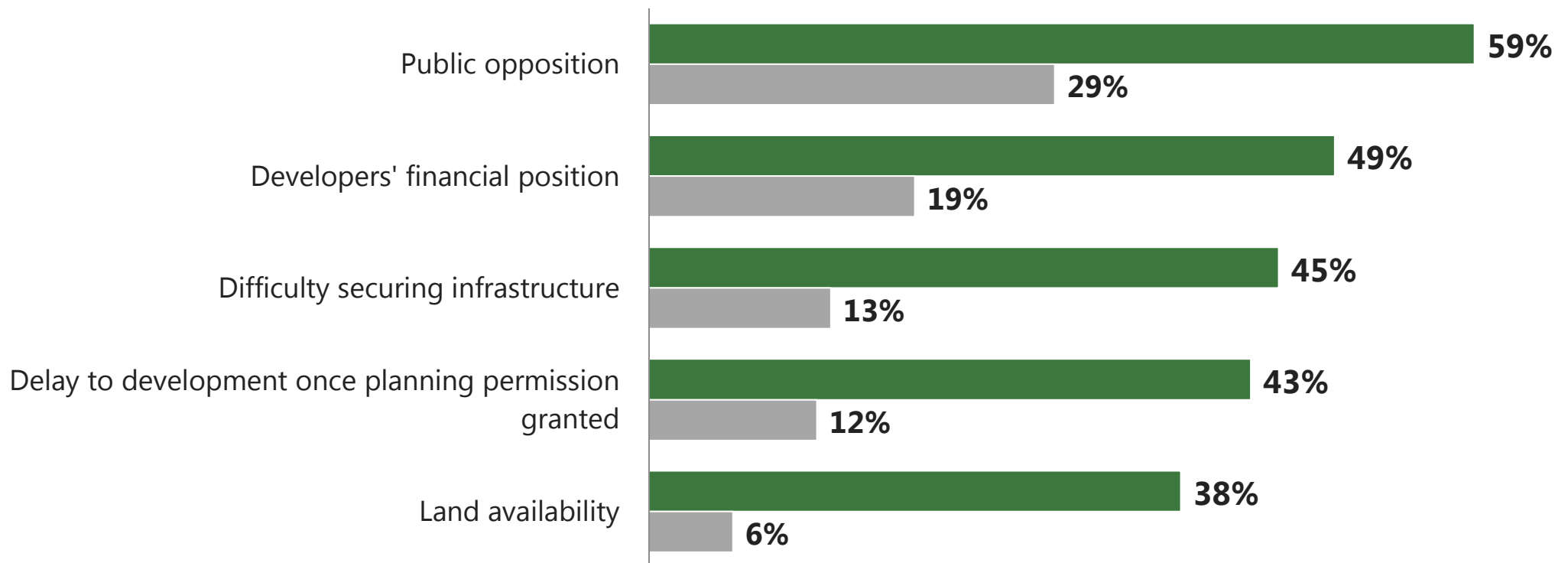
Are we good at it?

“Britain has a poor record at getting national infrastructure projects right”



The public are often the barriers

Top 5 mentions



Q. What, if any, barriers have there been to housing development in your local authority areas over the past 2 years?

They get the premise

Rail needs fixing

We won't sort
housing without
boosting supply

The economy needs
rebalancing,
infrastructure needs
strategic leadership

And are engaged with the key issues

Sustainable

Resilient

**Infrastructure
needs to be...**

Flexible

Smart &
interconnected

But there are pinchpoints

Public do not believe 'the lights will go out' if we do not act soon

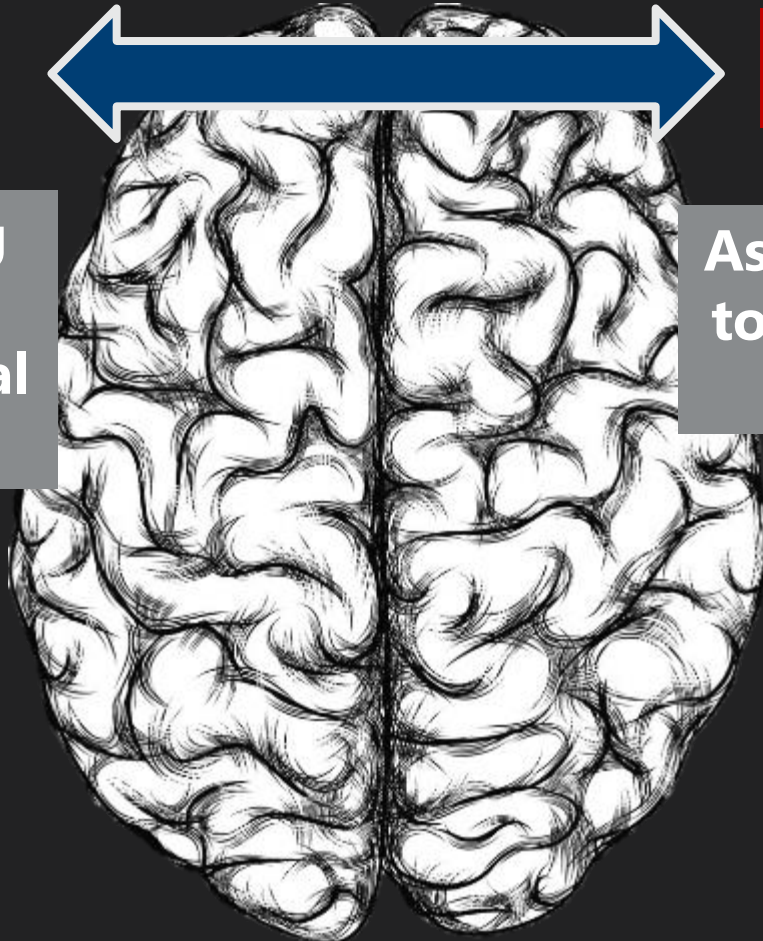
Local benefits not being articulated properly to affected communities

People not convinced by the voices currently championing infrastructure developments

Two mindsets

Citizen

As citizens – considering the big picture and weighing local or national priorities



Consumer

As individuals – unwilling to be inconvenienced for the greater good

The silent majority and vocal minority are *the same people*, depending on the project in question and the specific local circumstances

...which reflects the way they evaluate local projects

More opposition

1. Is there a significant negative impact on me personally?
2. Was this project completely unexpected when I moved here?
3. Does this project go against my values?
4. Is this being introduced so someone can make profit at my expense?
5. Do I feel the project is necessary?
6. Are there better alternatives?
7. Are the benefits overstated?

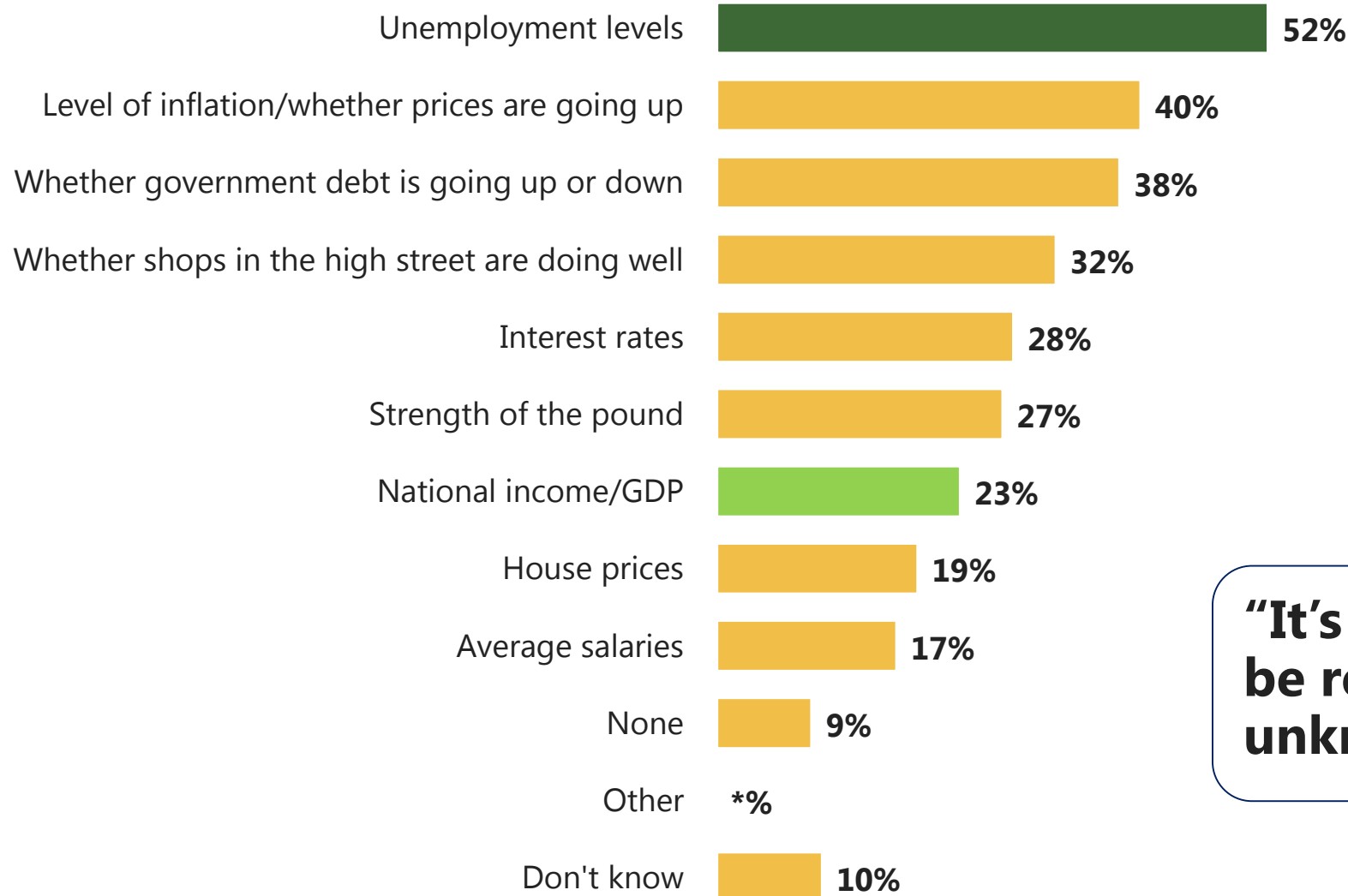
Less opposition

1. Are there tangible benefits for me personally?
2. Is appropriate compensation available to those affected?
3. Are there tangible benefits for the community?
4. Have I been consulted, and have my views been taken seriously?
5. What are the wider benefits to others?

But personal impact trumps other considerations – either way

Legacy and tangibility: jobs over 'growth'

When you hear about the state of the economy in the news, what specific types of information most influence your view of how the economy is doing?



“It’s very difficult to be reassured on an unknown quantity”

Social mobility (and housing!)

A photograph of a building at night, illuminated by city lights. A sign is posted on the building's facade. The sign is white with black text. The text on the sign reads: "Sorry! The lifestyle you ordered is currently out of stock". The sign is slightly tilted and the background is dark, suggesting it's nighttime.

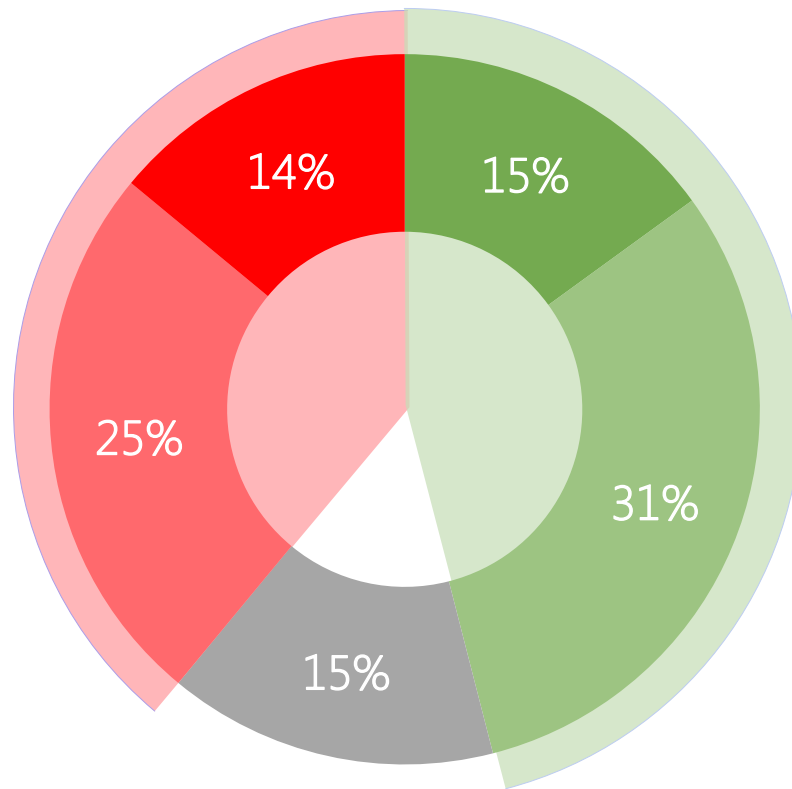
Sorry!
The lifestyle you
ordered is currently
out of stock

Weakening sense of social mobility

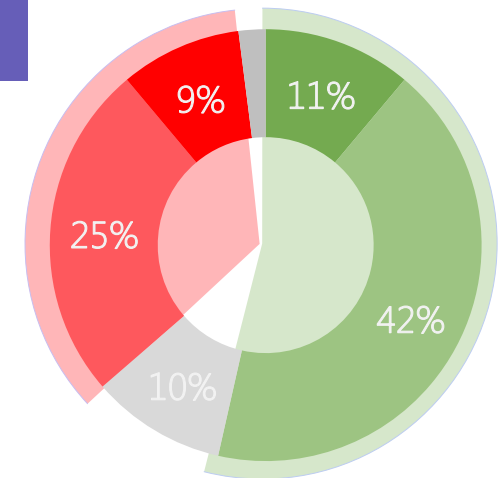
Q1) TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT BRITAIN...

A) PEOPLE HAVE EQUAL OPPORTUNITIES TO GET AHEAD?

2016



2008

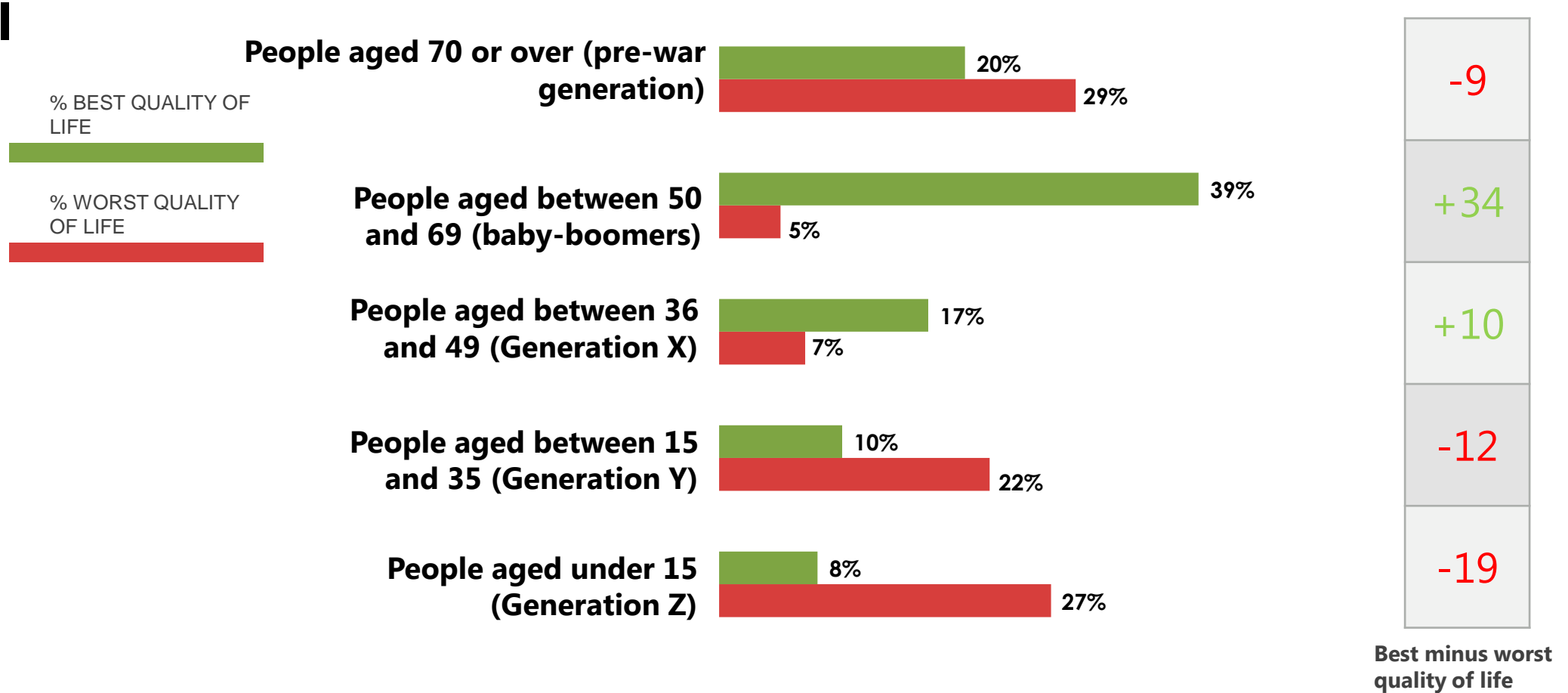


Source: Ipsos MORI/Sutton Trust, 2,060 GB adults, 15-20 May 2008

Source: Ipsos MORI / CIH 999 GB adults, 10-21 June 2016

Baby boomers are seen as the luckiest generation....

I'D NOW LIKE YOU TO THINK ABOUT THE THINGS THAT MAKE UP PEOPLE'S QUALITY OF LIFE SUCH AS ACCESS TO JOBS, HEALTHCARE, EDUCATION, HOUSING, BENEFITS FROM GOVERNMENT, AND SO ON. WHICH OF THE FOLLOWING GENERATIONS, IF ANY, WOULD YOU SAY WILL HAVE HAD THE BEST QUALITY OF LIFE OVER THEIR LIFETIME? AND WHICH WILL HAVE HAD THE WORST?

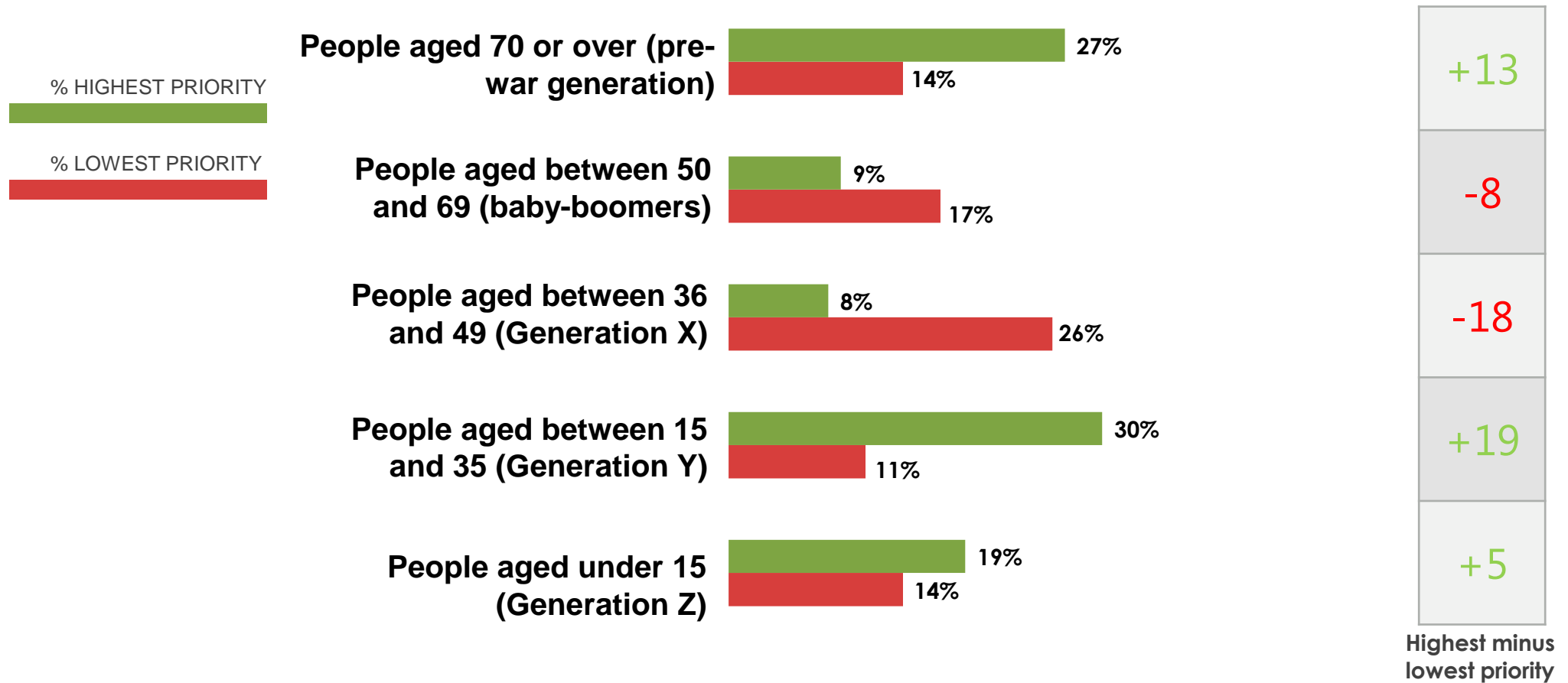


Base: 1,021 British adults 18+, 17th – 19th October 2015

Source: Ipsos MORI

While pre-war and Gen Y are the top priorities for help.

NOW THINK ABOUT THE QUALITY OF LIFE FOR PEOPLE IN BRITAIN WHO HAVE GROWN UP IN DIFFERENT GENERATIONS. WHICH OF THE FOLLOWING GENERATIONS, IF ANY, DO YOU THINK SHOULD BE THE HIGHEST PRIORITY FOR GOVERNMENT HELP FOR THEIR QUALITY OF LIFE OVER THE NEXT FEW YEARS? AND WHICH SHOULD BE THE LOWEST PRIORITY?

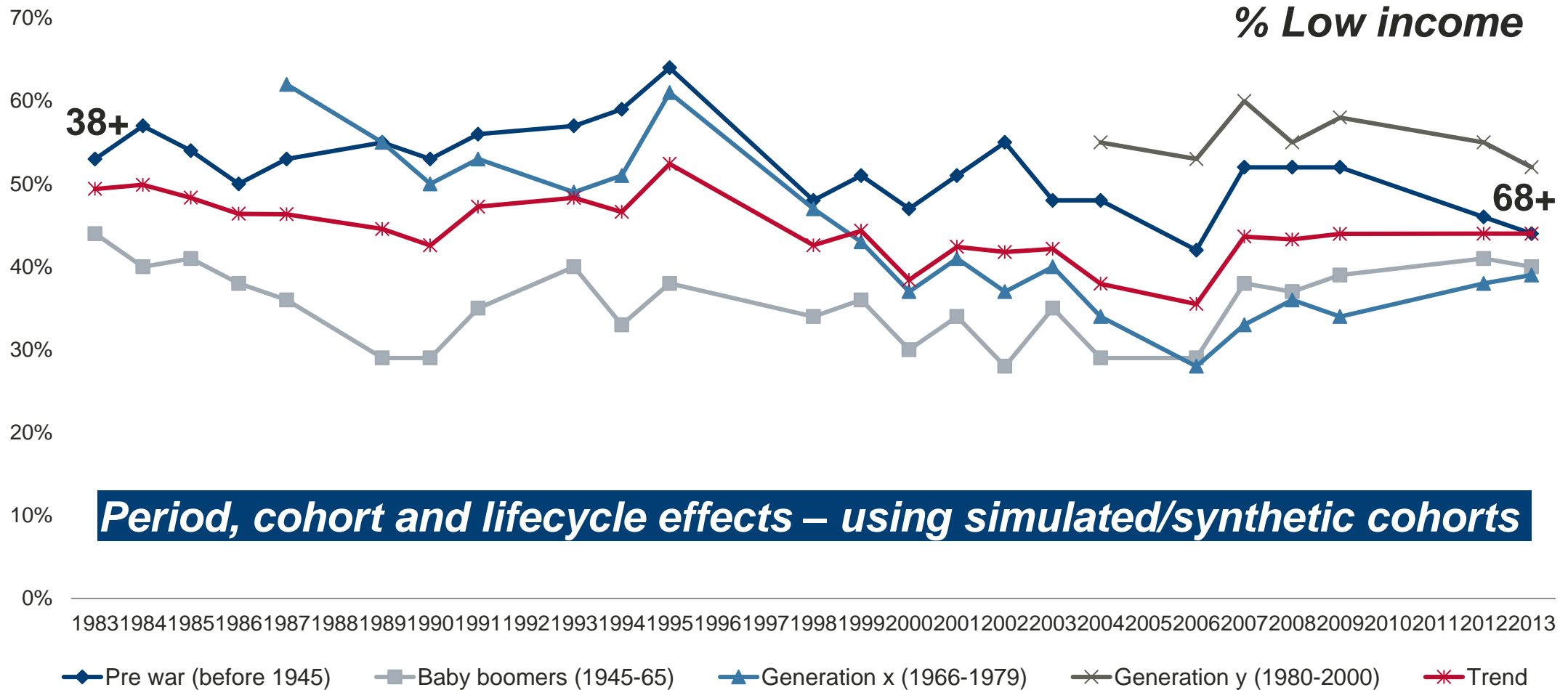


Base: 1,021 British adults 18+, 17th – 19th October 2015

Source: Ipsos MORI

Current cohort of young feeling poor for longer...

"AMONG WHICH GROUP WOULD YOU PLACE YOURSELF ... HIGH INCOME, MIDDLE INCOME OR LOW INCOME?"

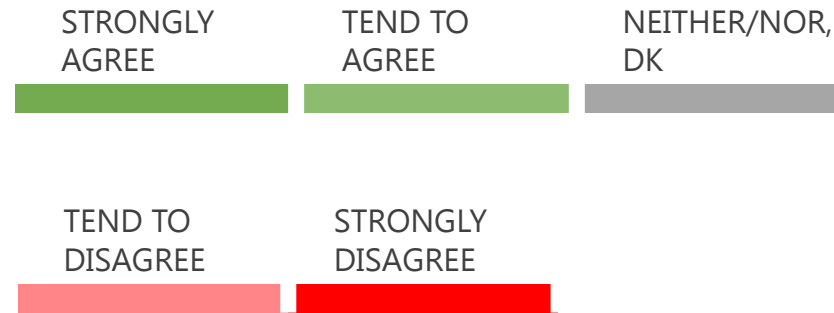
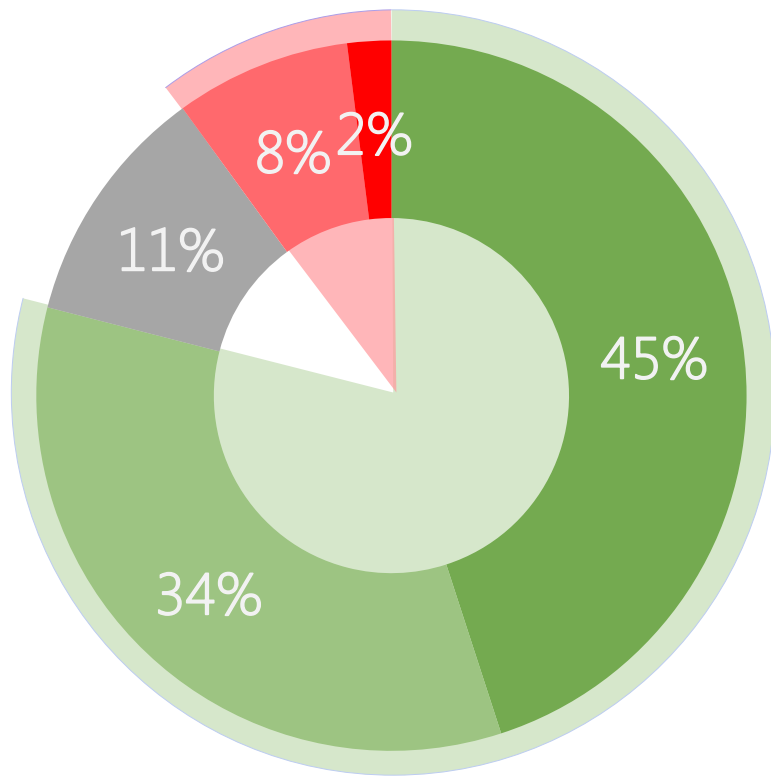


All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Even hard-working young will lose out

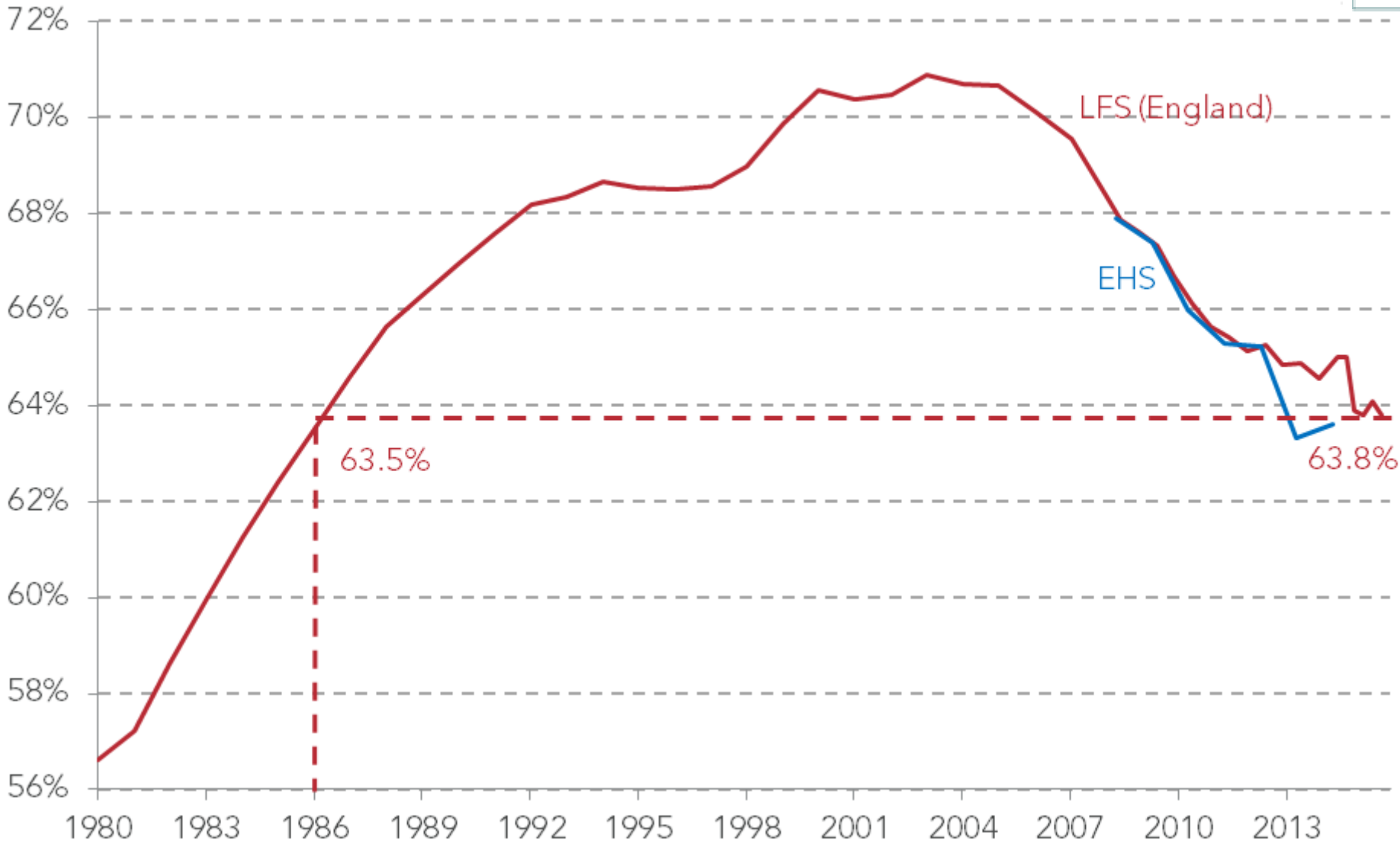
Q1) TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT BRITAIN...
B) EVEN IF TODAY'S YOUNG PEOPLE WORK HARD AND GET GOOD JOBS, THEY WILL HAVE A HARD TIME GETTING THE RIGHT KIND OF HOUSING?



Home-ownership declining

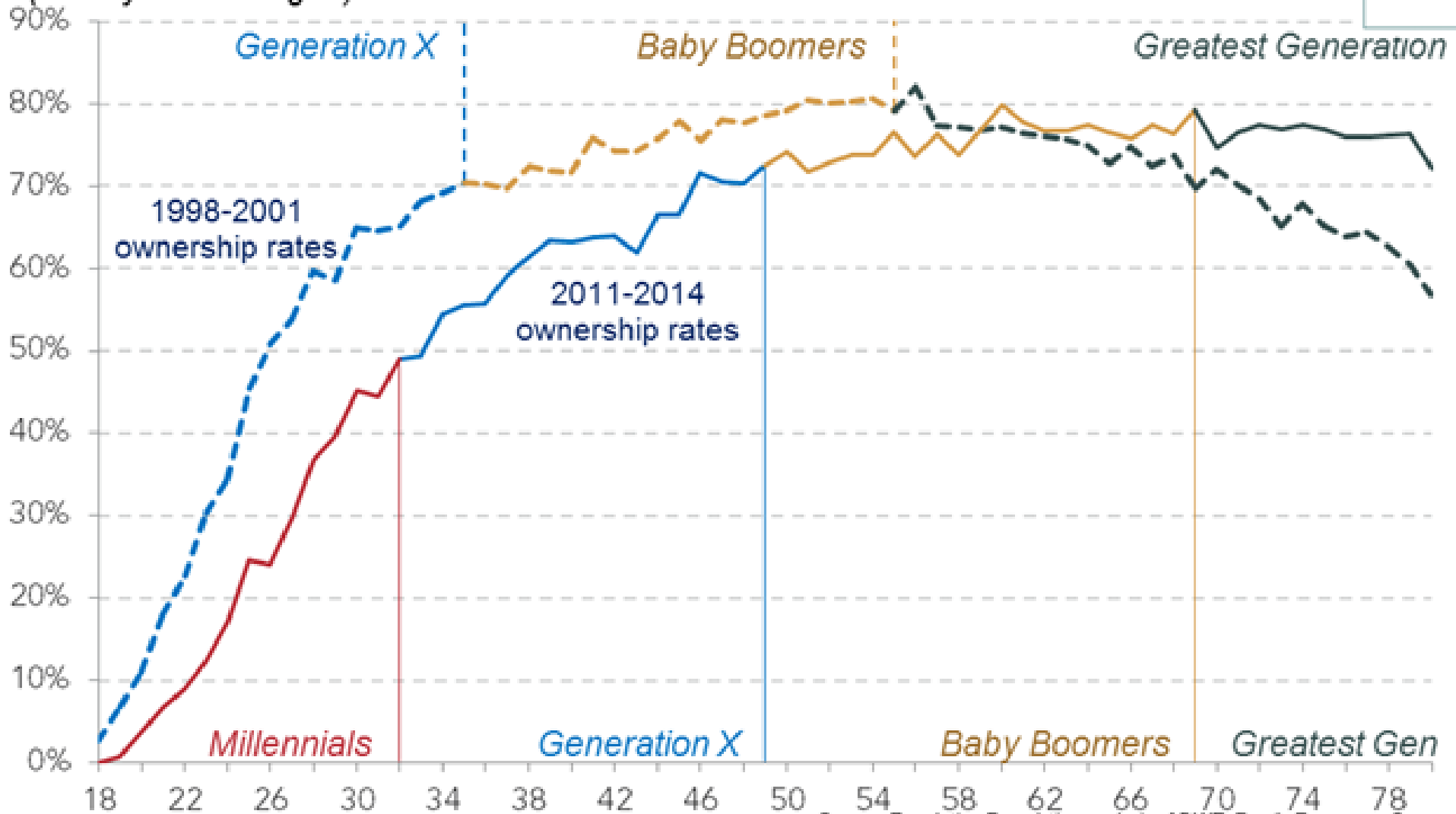


Home ownership in England, 1980 - 2016



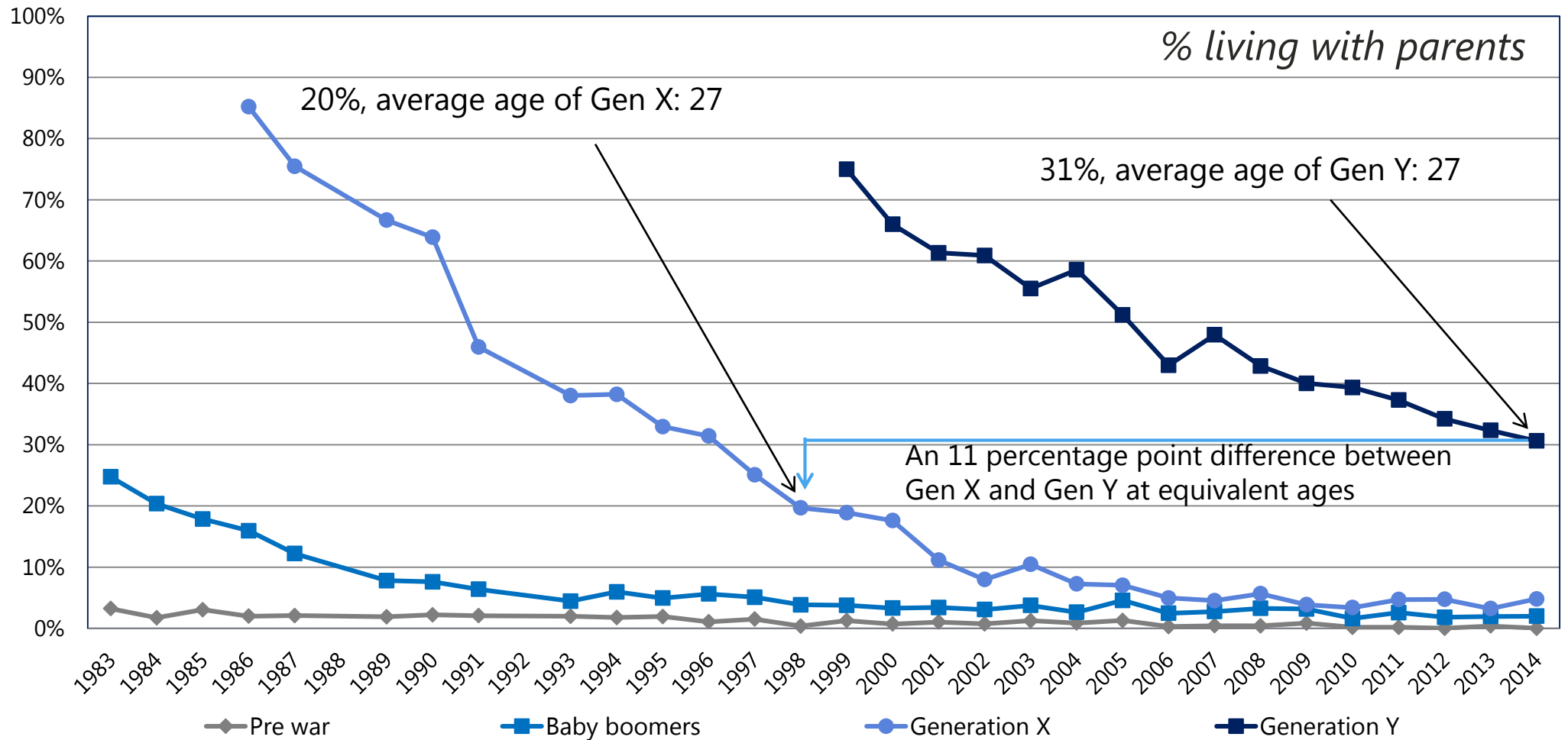
Each successive generation finding it harder

Homeownership rate by age of household head: 1998-2001 and 2011-14
(Four-year averages)



Source: Resolution Foundation analysis of DWP, Family Resources Survey

As more of Gen Y are living with their parents than older generations were at the same age



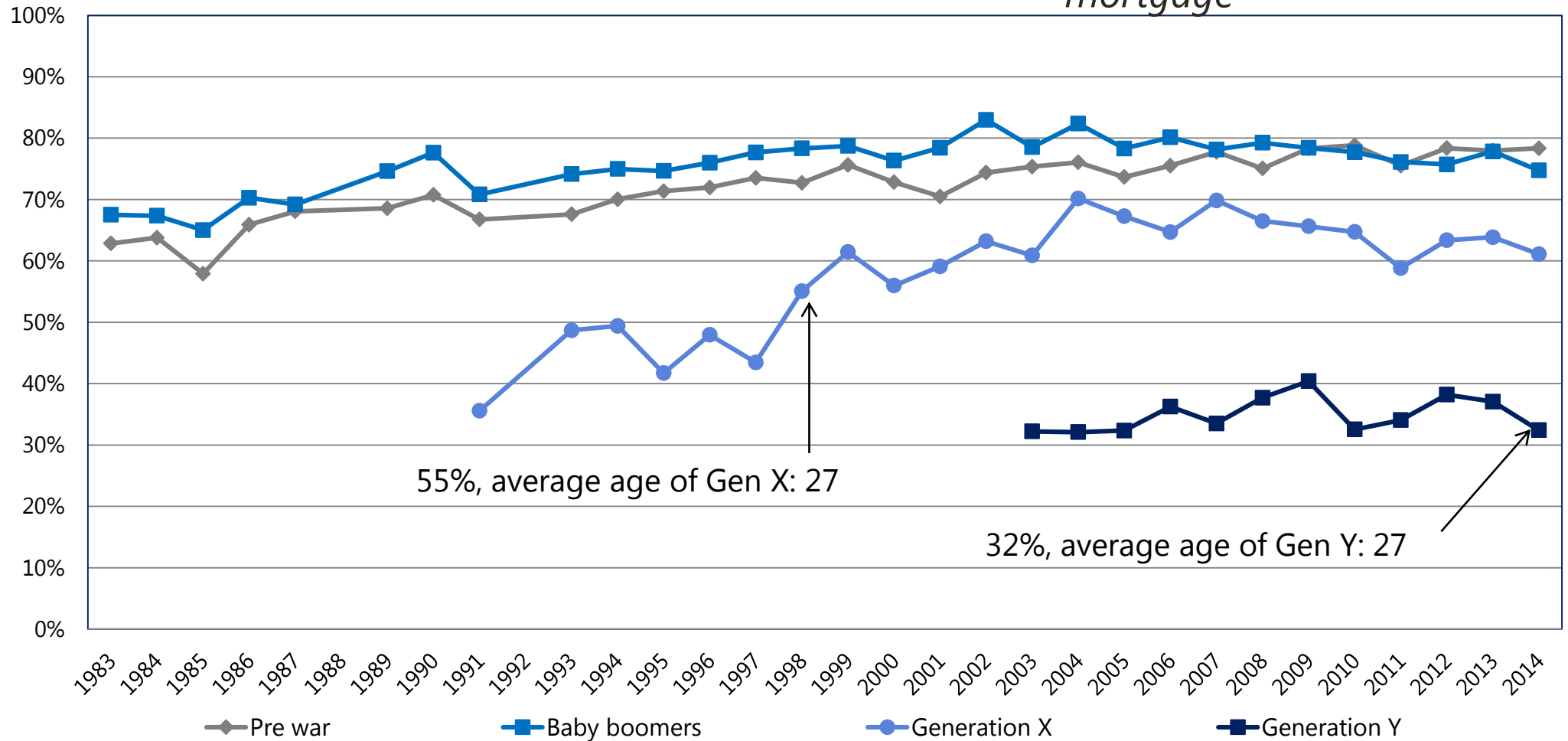
All data points represent > 100 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Unlike Gen X, Gen Y so far shows little sign of closing the gap....

TENURE OF PEOPLE LIVING INDEPENDENTLY: OWNER-OCCUPIERS

% Own home, pays mortgage



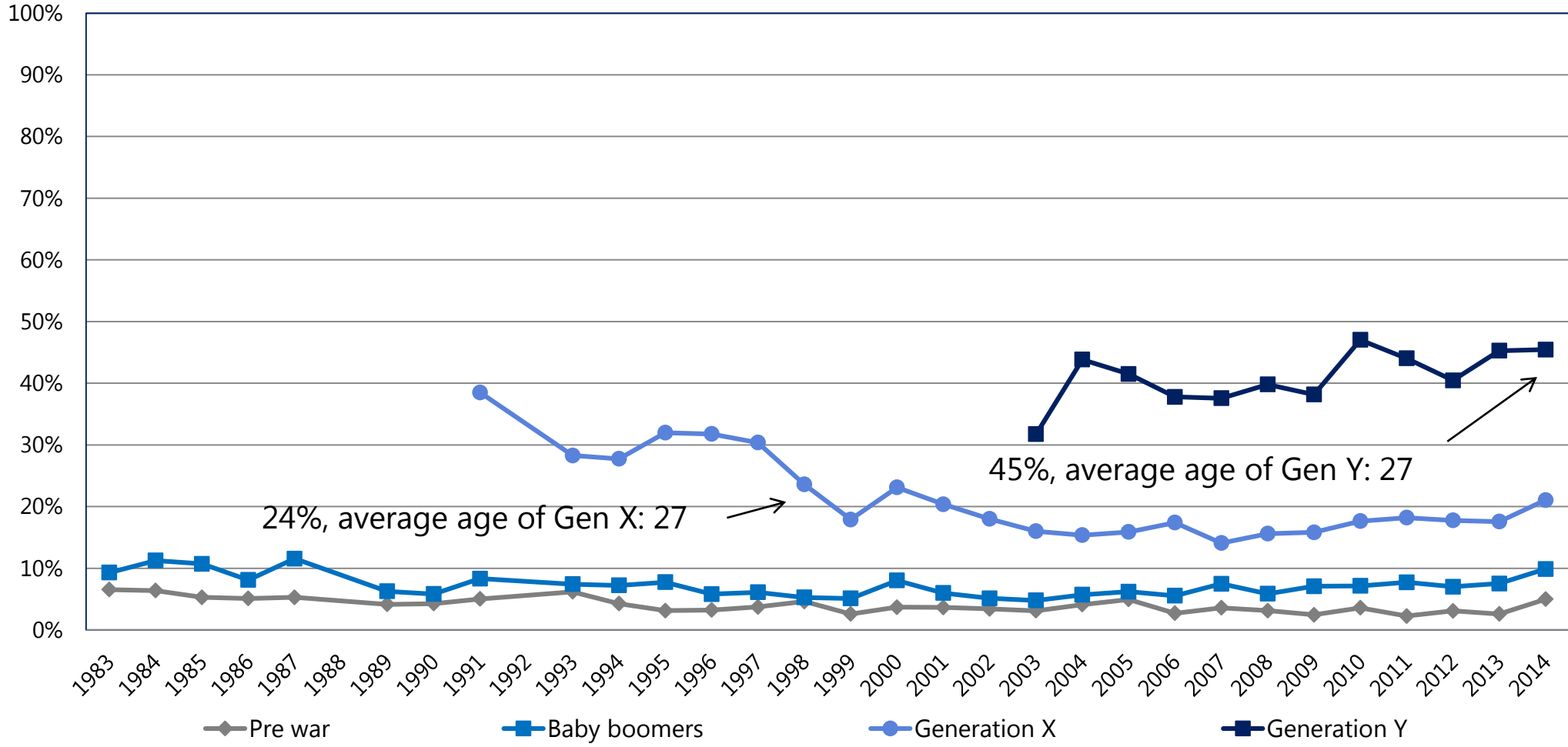
All data points represent > 100 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

While Gen Y are almost twice as likely to be renting privately than Gen X at the same age

TENURE OF PEOPLE LIVING INDEPENDENTLY: PRIVATE RENTERS

% Rent privately



All data points represent > 100 responses

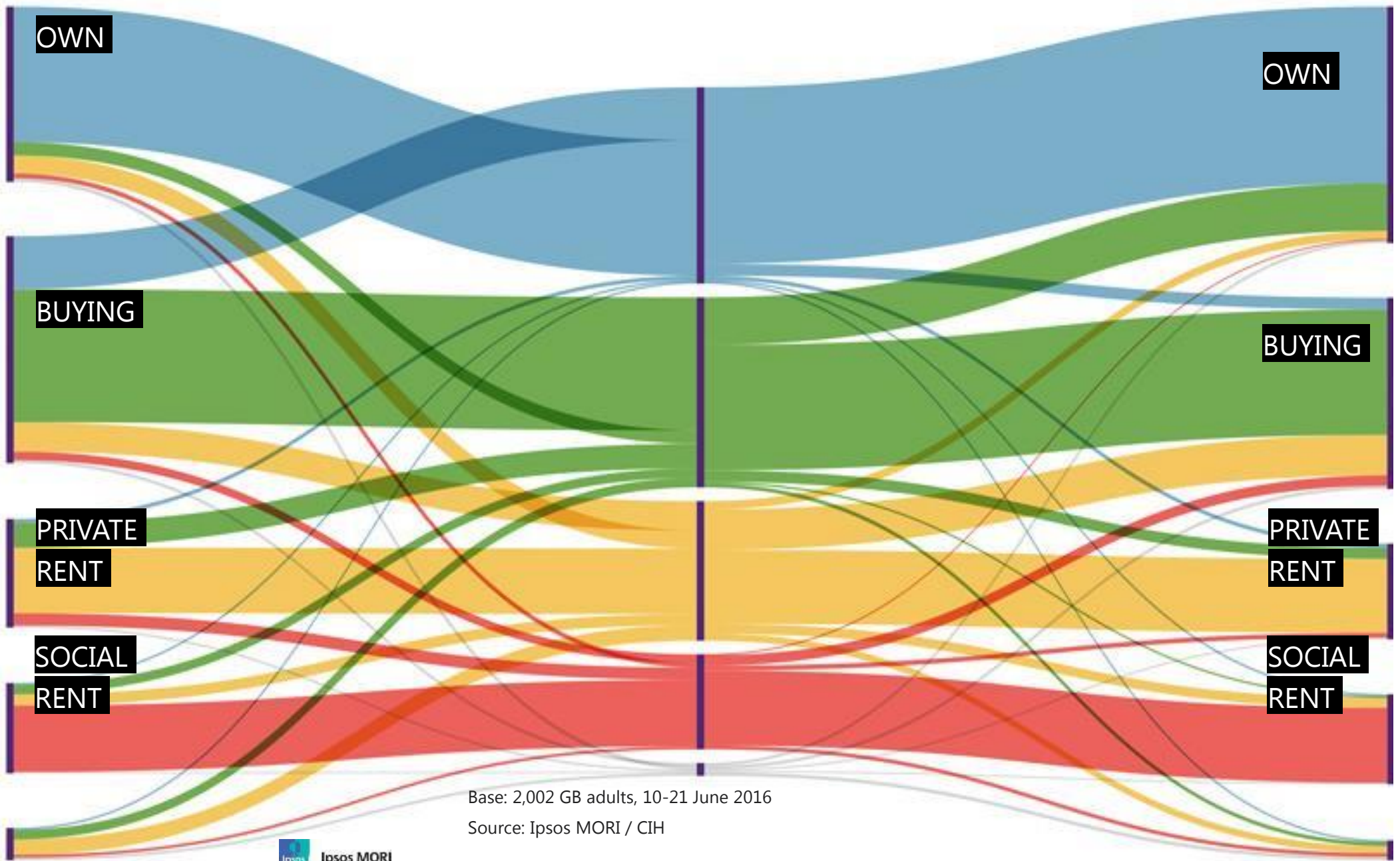
Source: Ipsos MORI reanalysis of British Social Attitudes

Future: most private renters expect to still be renting

PAST

PRESENT

FUTURE
+ 5 YEARS

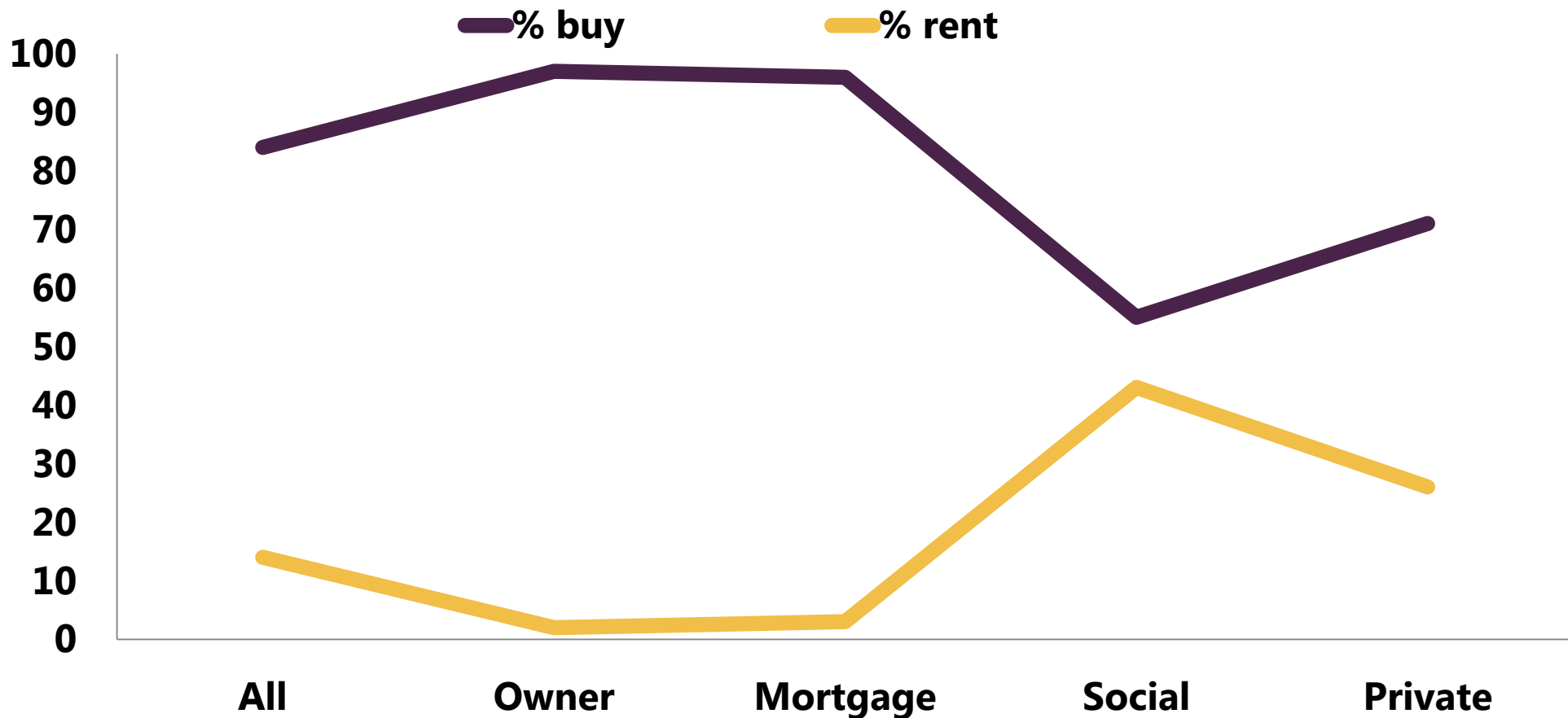


Base: 2,002 GB adults, 10-21 June 2016

Source: Ipsos MORI / CIH

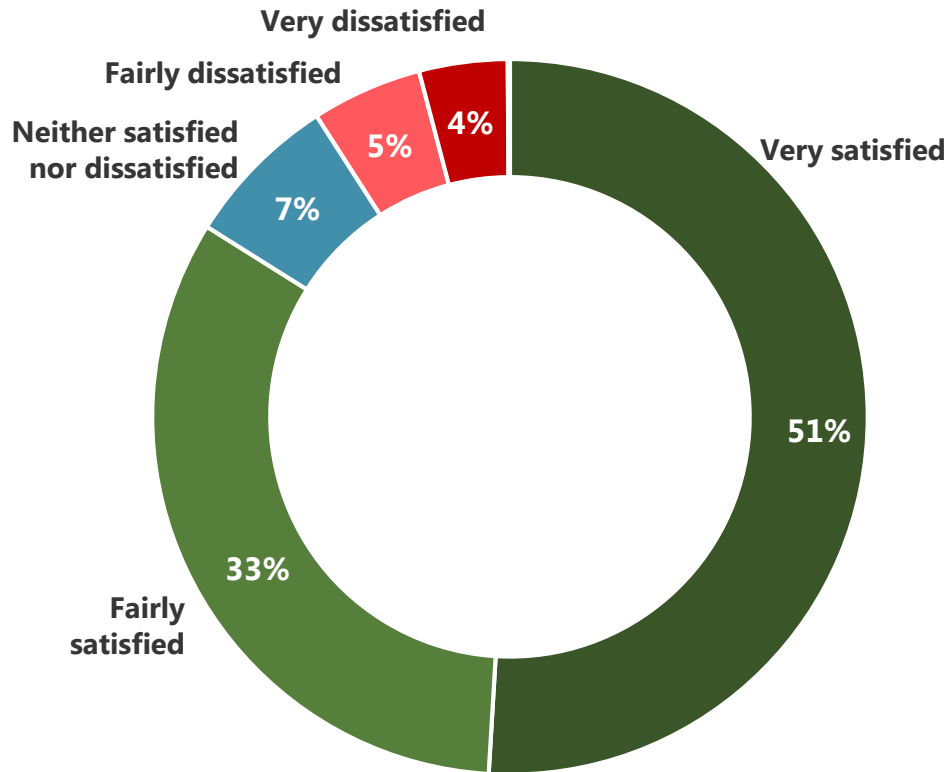
But all would still prefer to own their own home

Q. IF YOU HAD A FREE CHOICE, WHICH ONE OF THESE WOULD YOU PERSONALLY CHOOSE TO LIVE IN IN 5 YEARS' TIME?

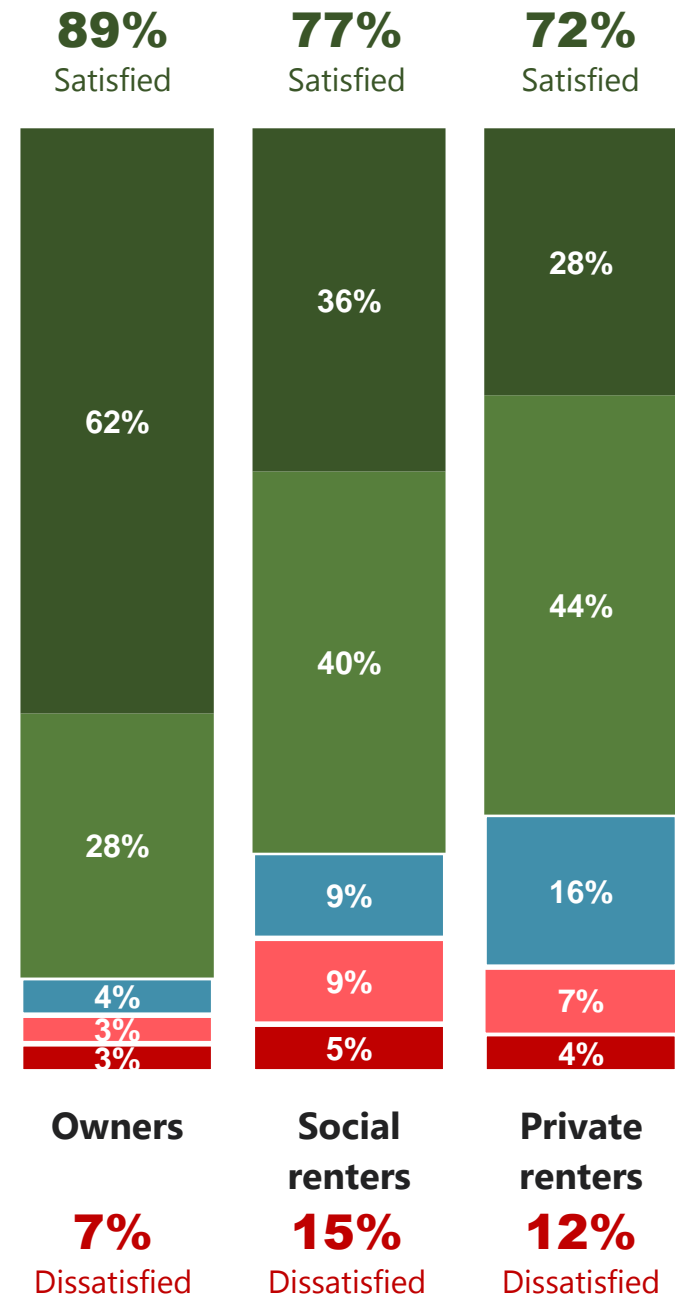


Partly because issues with renting

Q. TAKING EVERYTHING INTO ACCOUNT, HOW SATISFIED OR DISSATISFIED ARE YOU WITH THE PROPERTY YOU CONSIDER TO BE YOUR MAIN HOME? ...



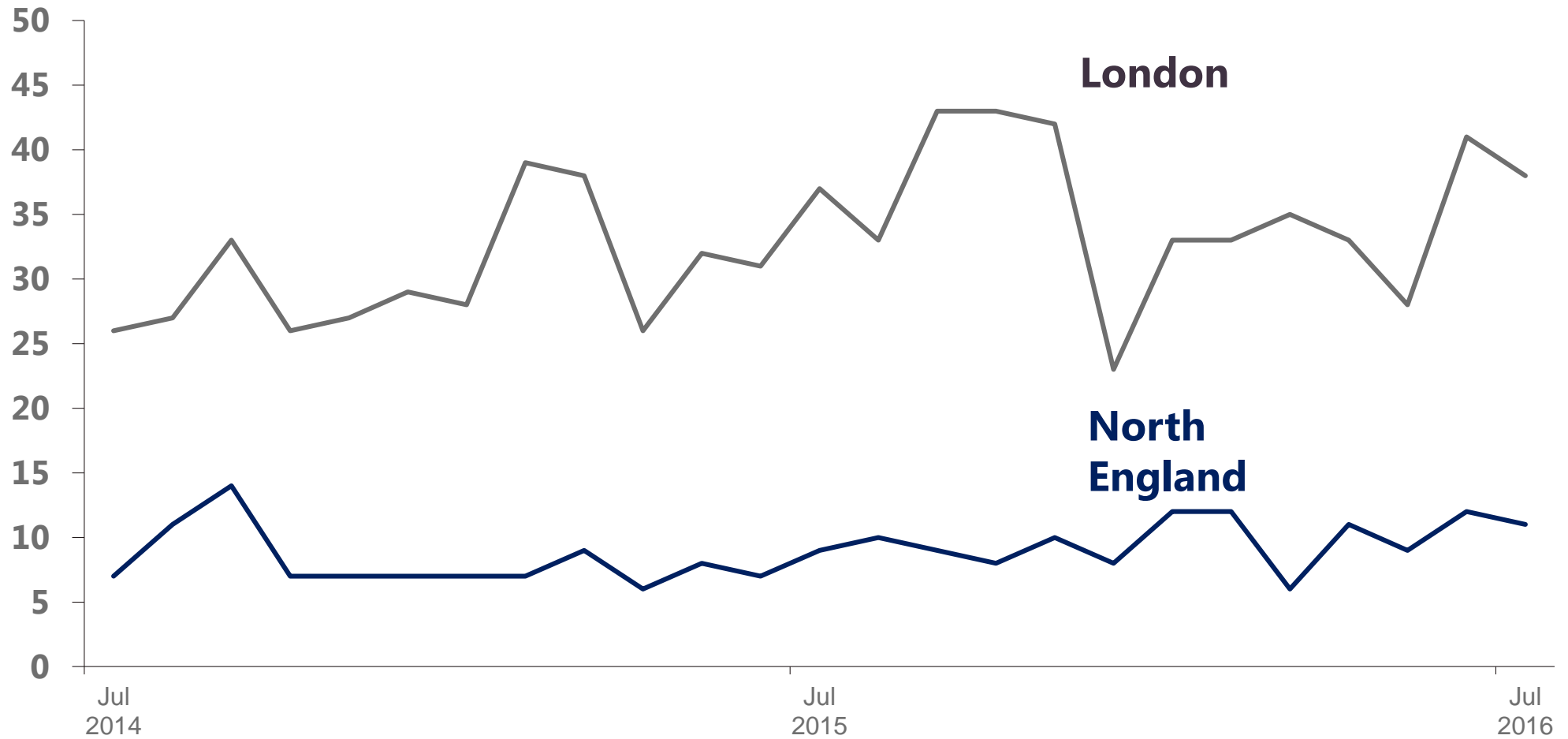
Very/ fairly satisfied	84%
Very/ fairly dissatisfied	9%



Especially salient in London

Q. WHAT DO YOU SEE AS THE MOST/OTHER IMPORTANT ISSUES FACING BRITAIN? – HOUSING?

% mentioning



Base: c.1,000 British adults (c.150 London, c.230 North England)

Source: Ipsos MORI Issues Index

Many expect to be priced out



... **44%** say they *would consider* leaving London if house prices and rents continue to rise.

This rises to **64% of private renters.**

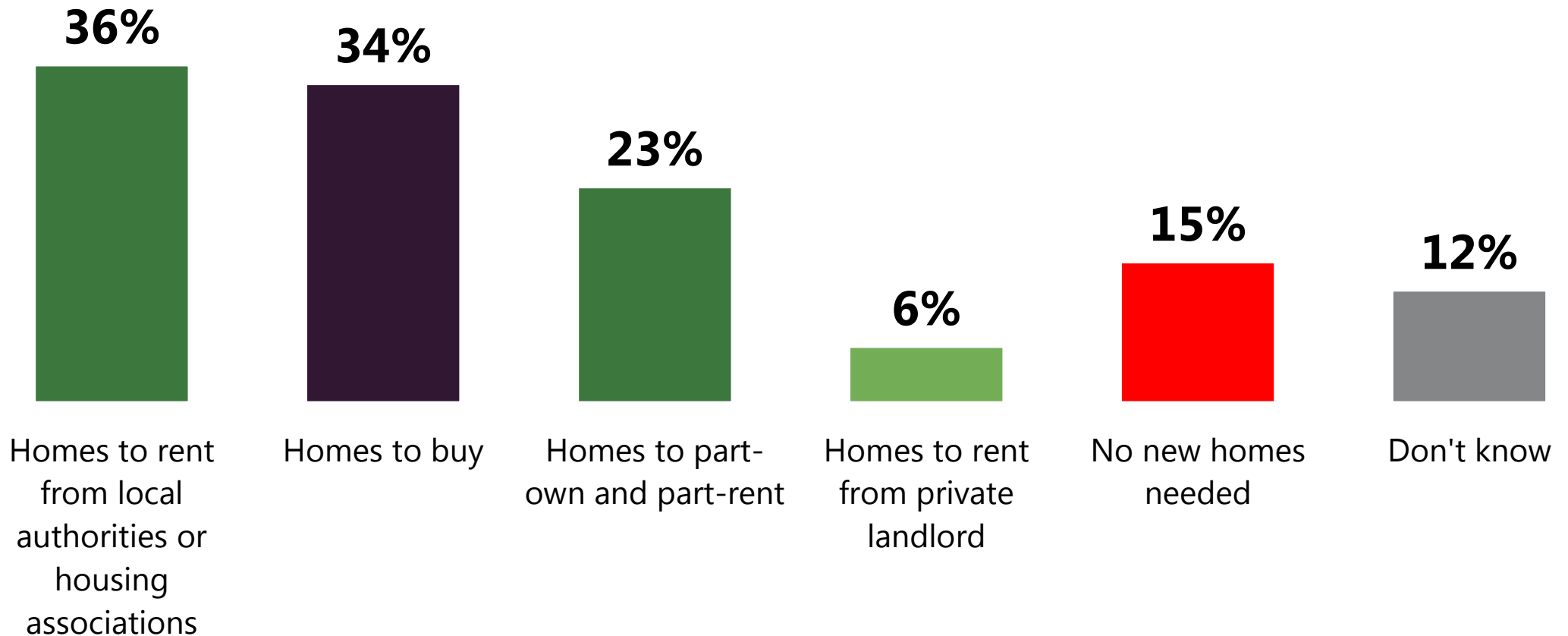


...**34%** say they *are considering* moving out of London and **taking a job elsewhere** because of high housing costs

This rises to **48% of private renters.**

People want mixed tenure provision

Q. IF NEW HOMES WERE TO BE BUILT IN YOUR LOCAL AREA, WHICH IF ANY OF THESE TYPES OF HOMES DO YOU THINK ARE MOST NEEDED ...



Base: 2,000 GB adults, 16-75 (online), 30 May-4 June 2014

Help to Buy beneficiaries think it made the difference

Q. AT THE TIME YOU MOVED IN <<ADDRESS>>...

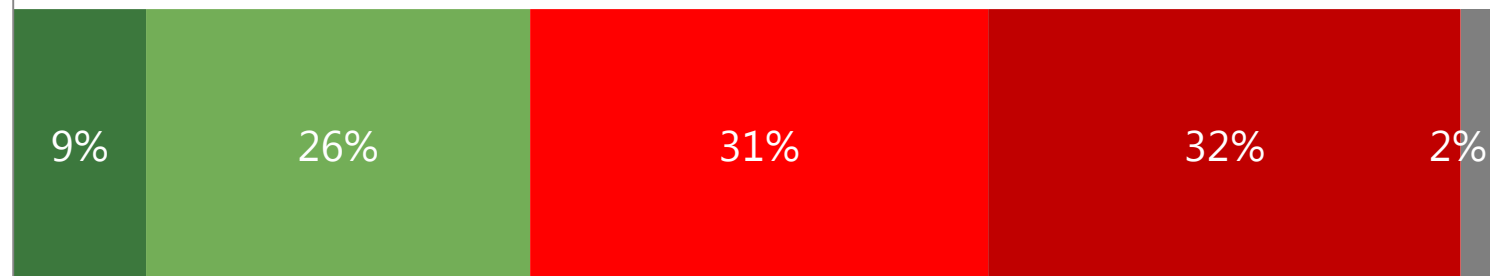
■ Yes - definitely ■ Yes - probably ■ No - probably not
■ No - definitely not ■ Don't know

... do you think you would have been able to buy this **same property** without the assistance of the Help to Buy Equity Loan scheme or not?



17% 82%

..and do you think you would have been able to buy a similar property that was NOT new build and being sold by its owner. By similar I mean in terms of type, size and location?



35% 63%

But flip side recognised

Q. IT HELPS FIRST-TIME
BUYERS WHO WOULDN'T
OTHERWISE BE ABLE TO GET
ON THE PROPERTY LADDER ...

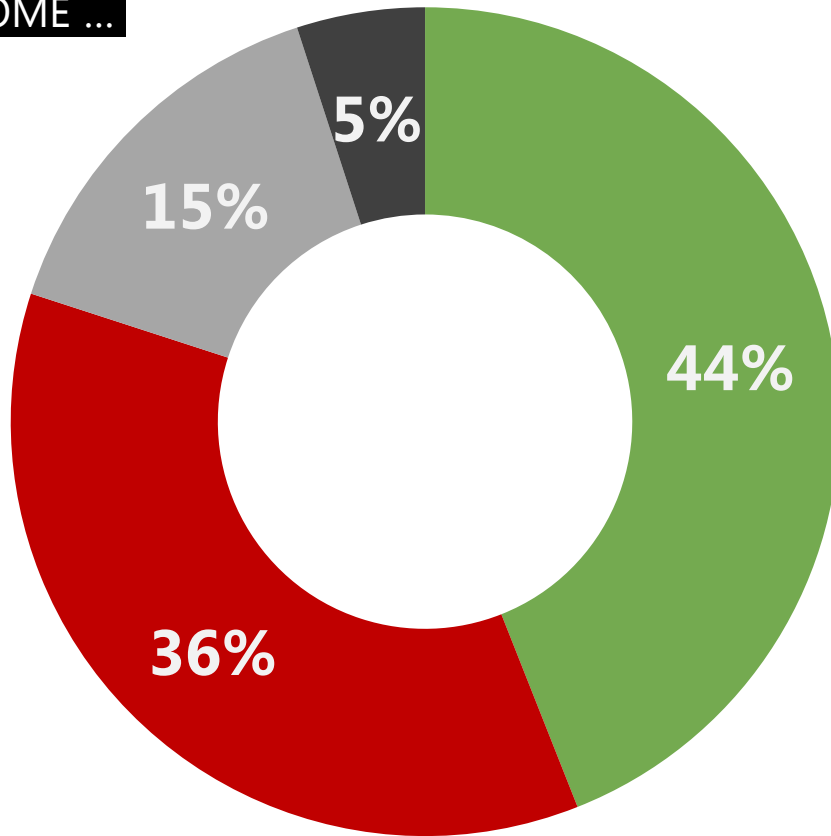
67 % agree

74 % agree

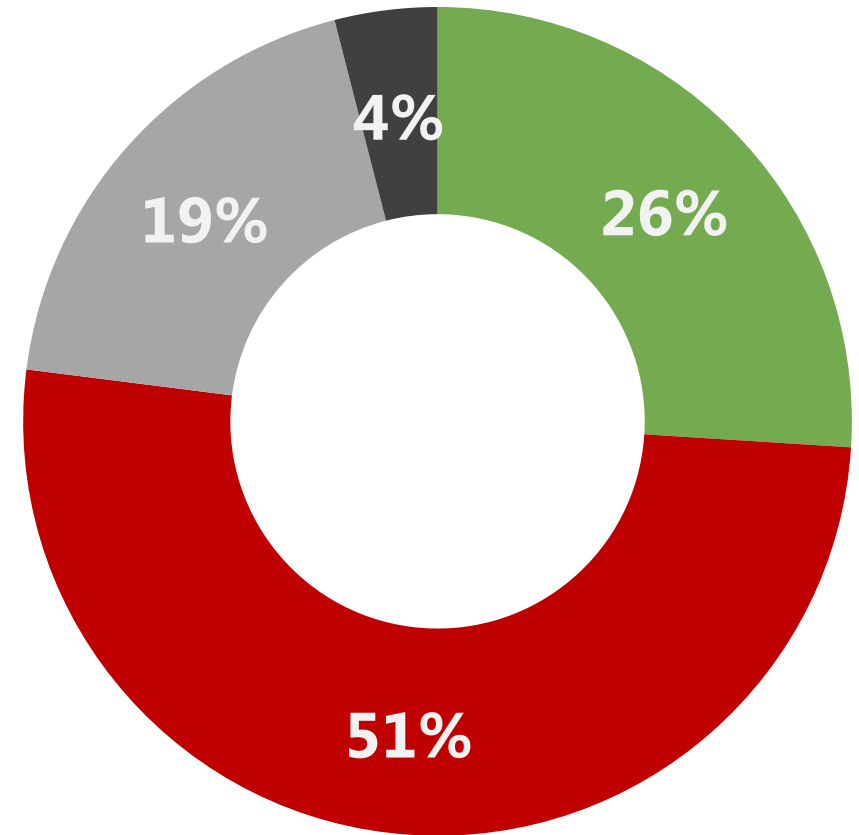
Q. IT IS NOT A LONG-TERM
SOLUTION TO THE LACK OF
AFFORDABLE HOUSING IN
THIS COUNTRY ...

Same for other policies too

Q. TO WHAT EXTENT DO YOU SUPPORT OR OPPOSE THE POLICY OF COUNCILS BEING REQUIRED TO SELL OFF SOME OF THEIR HOUSING IN ORDER TO GIVE HOUSING ASSOCIATION TENANTS THE CHANCE TO OWN THEIR OWN HOME ...



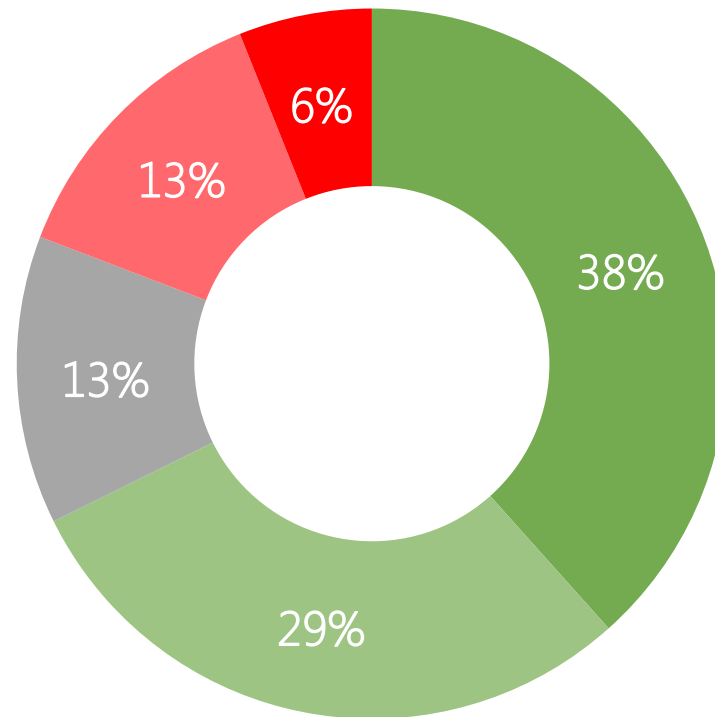
Q. TO WHAT EXTENT DO YOU SUPPORT OR OPPOSE IT IF IT MEANS LESS AFFORDABLE HOUSING BEING AVAILABLE FOR LONDONERS IN THE FUTURE? ...



Supply as silver bullet?

Q. TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT....

Unless we build a lot more homes in Britain, we will never solve the country's housing problems....

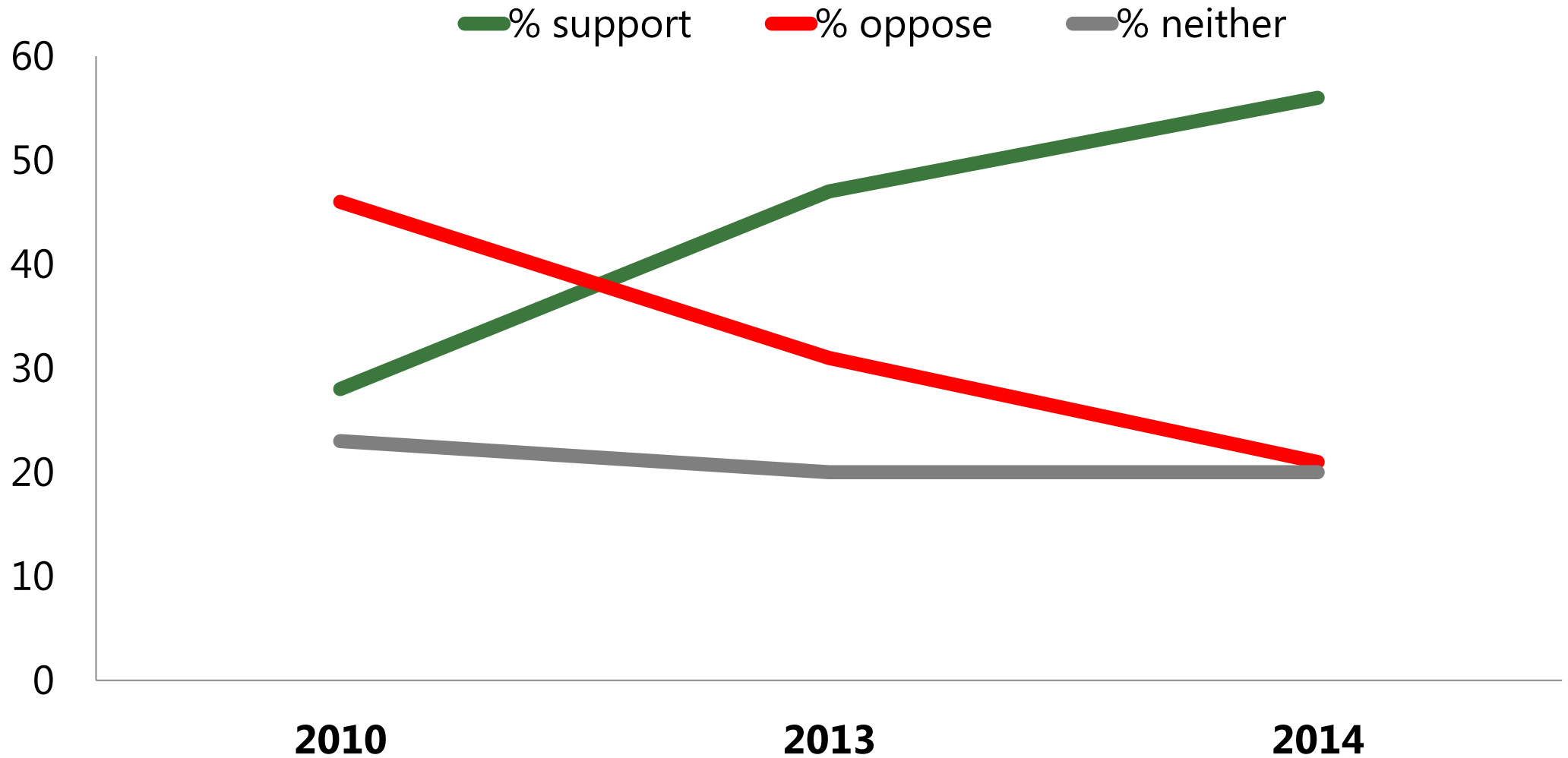


Base: 999 GB adults, 10-21 June 2016

Source: Ipsos MORI / CIH

Remarkable shift in opinion

Q. WOULD YOU SUPPORT OR OPPOSE MORE HOMES BEING BUILT IN YOUR LOCAL AREA?



Source: British Social Attitudes Survey

But support is *very* conditional

Q. I AM NOW GOING TO SHOW YOU FIVE DIFFERENT TYPES OF NEW HOUSING... TO WHAT EXTENT WOULD YOU SUPPORT OR OPPOSE THE BUILDING OF NEW HOMES SIMILAR TO THE PHOTO IN YOUR LOCAL AREA ON BROWNFIELD LAND?



73%
12%

Type A (Derwenthorpe)



23%
61%

Type B (South London)



75%
12%

Type C (Poundbury)



51%
31%

Type D (Bude)



34%
46%

Type E (East London)

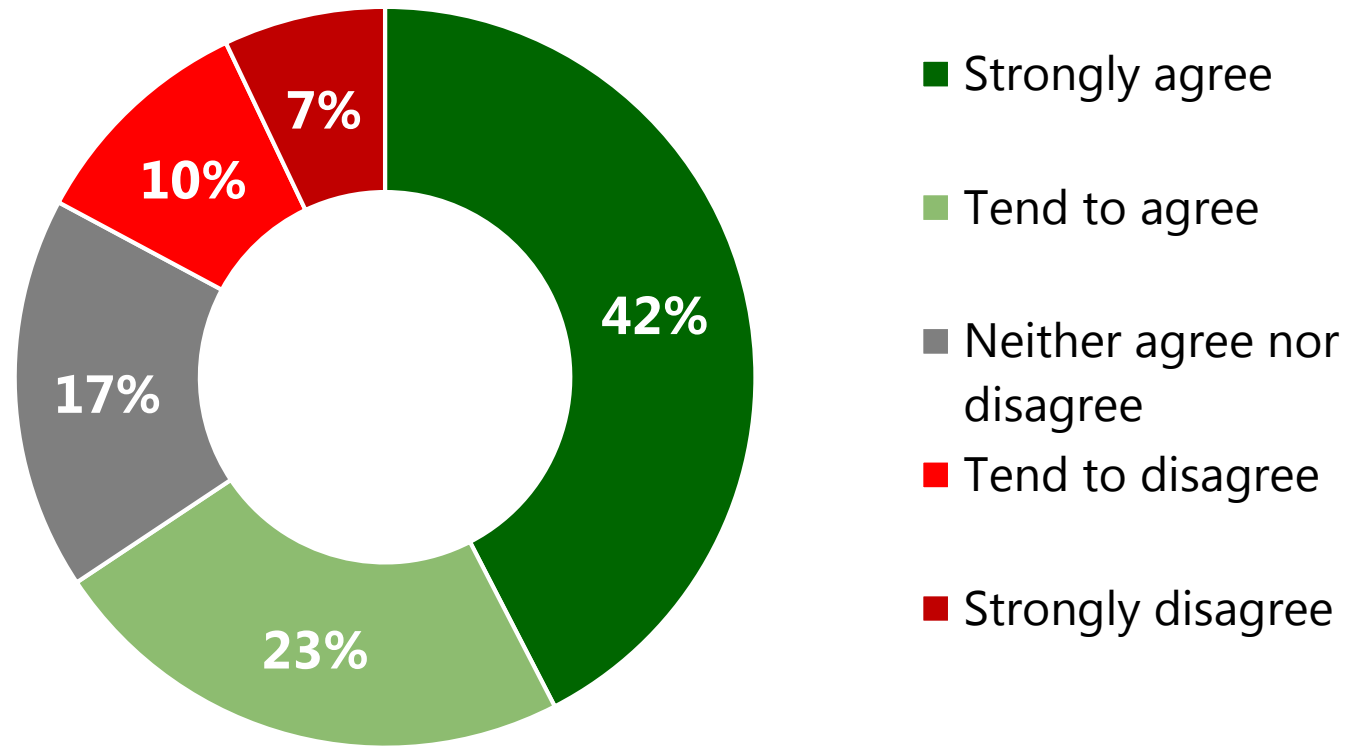
NB – Respondents asked to review initial screen of all five images for a minute before rating each image individually (and order randomised for each respondent) – see methodology note.

Base: 1,000 GB adults, 15-31 May 2015

Source: Ipsos MORI / Create Streets

Sensitivity about green belt

Q. IN ENGLAND, THE GREEN BELT IS AGRICULTURAL AND/OR LARGELY UNDEVELOPED LAND AROUND OR BETWEEN LARGE URBAN AREAS ON WHICH BUILDING IS NOT ALLOWED. THE PURPOSES OF THIS,...HOWEVER, SOME PEOPLE ARGUE THAT IT IS NECESSARY TO BUILD ON.... TO WHAT EXTENT DO YOU AGREE OR DISAGREE, IN PRINCIPLE, THAT EXISTING GREEN BELT LAND IN ENGLAND SHOULD BE RETAINED AND NOT BUILT ON.



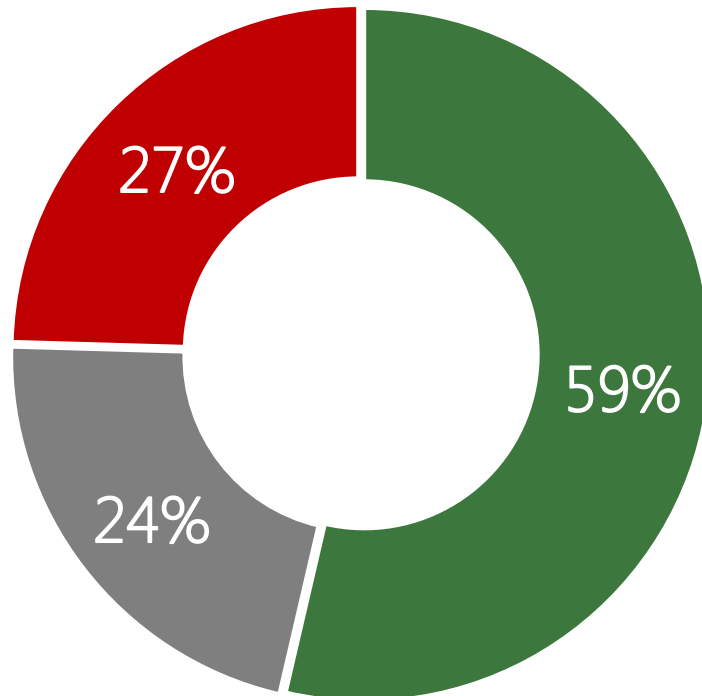
Base: 845 adults aged 15+ in England, 3-12 July 2015

Source: Ipsos MORI/CPRE

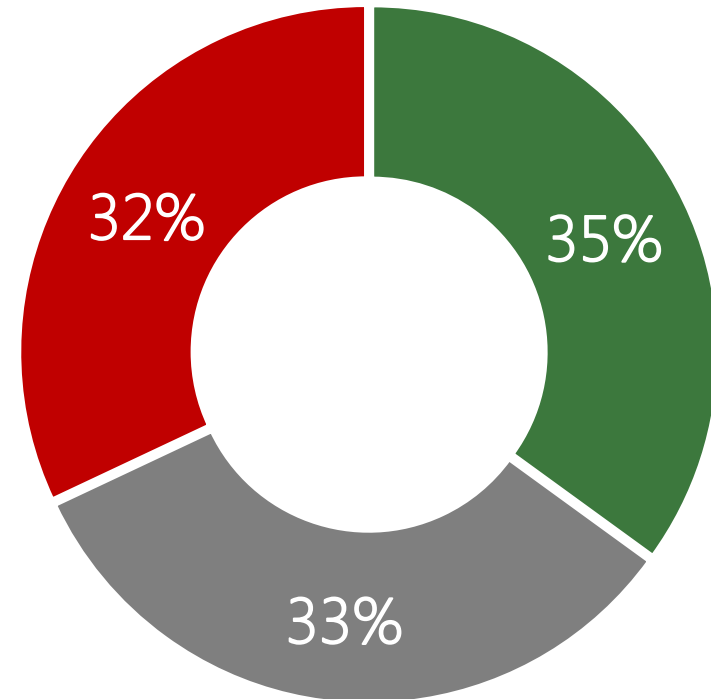
We detect change anxiety too

Q. TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT...

THERE IS ALREADY ENOUGH DEVELOPMENT HERE



In the past, new development has changed the character of the area for the worse

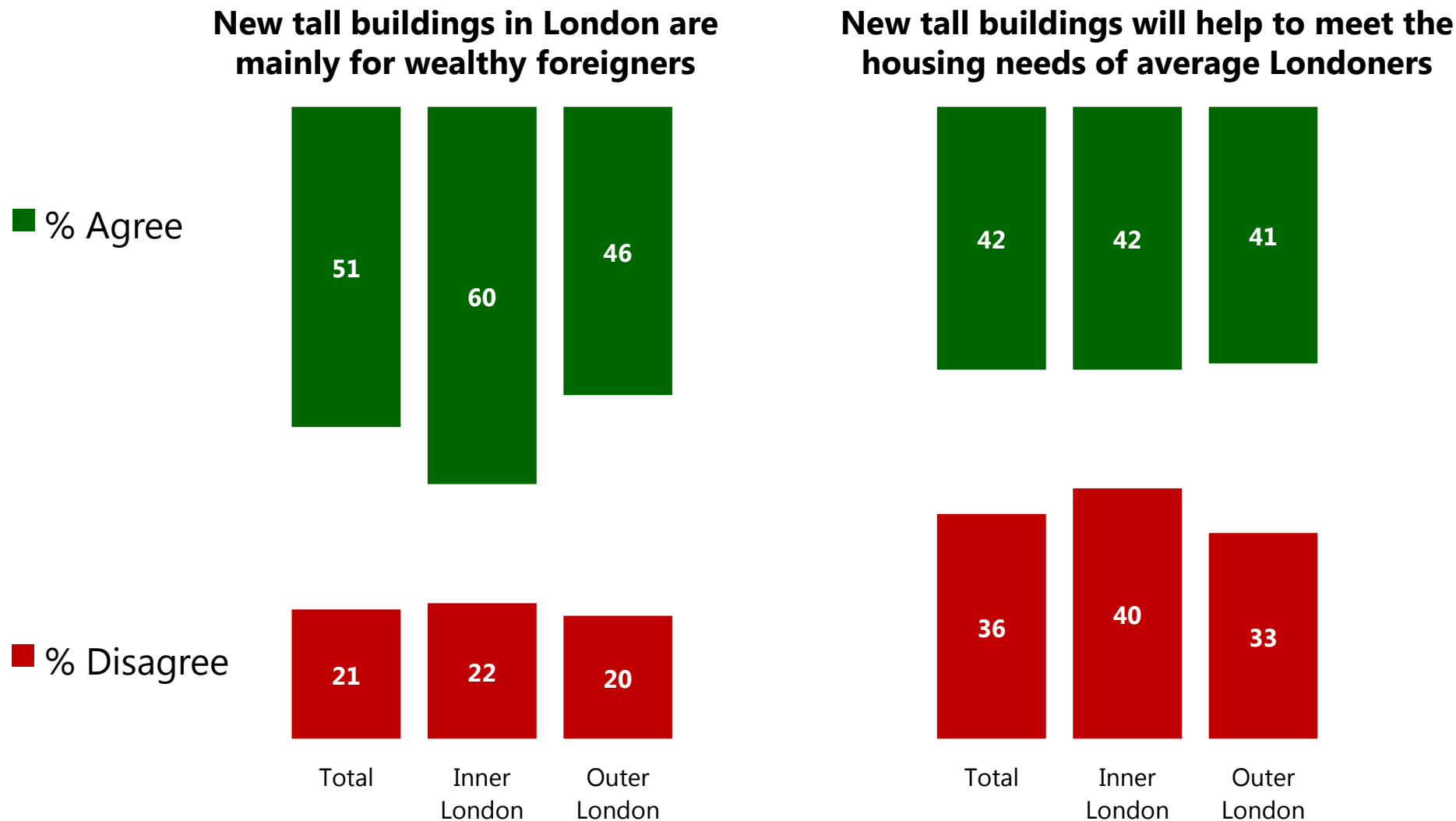


Base: 1,699 adults aged 16+, April-May 2012

Source: Ipsos MORI/British Property Federation

Right now, affordability important

Q. TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS...?



Source: Ipsos MORI

Other types of sustainability

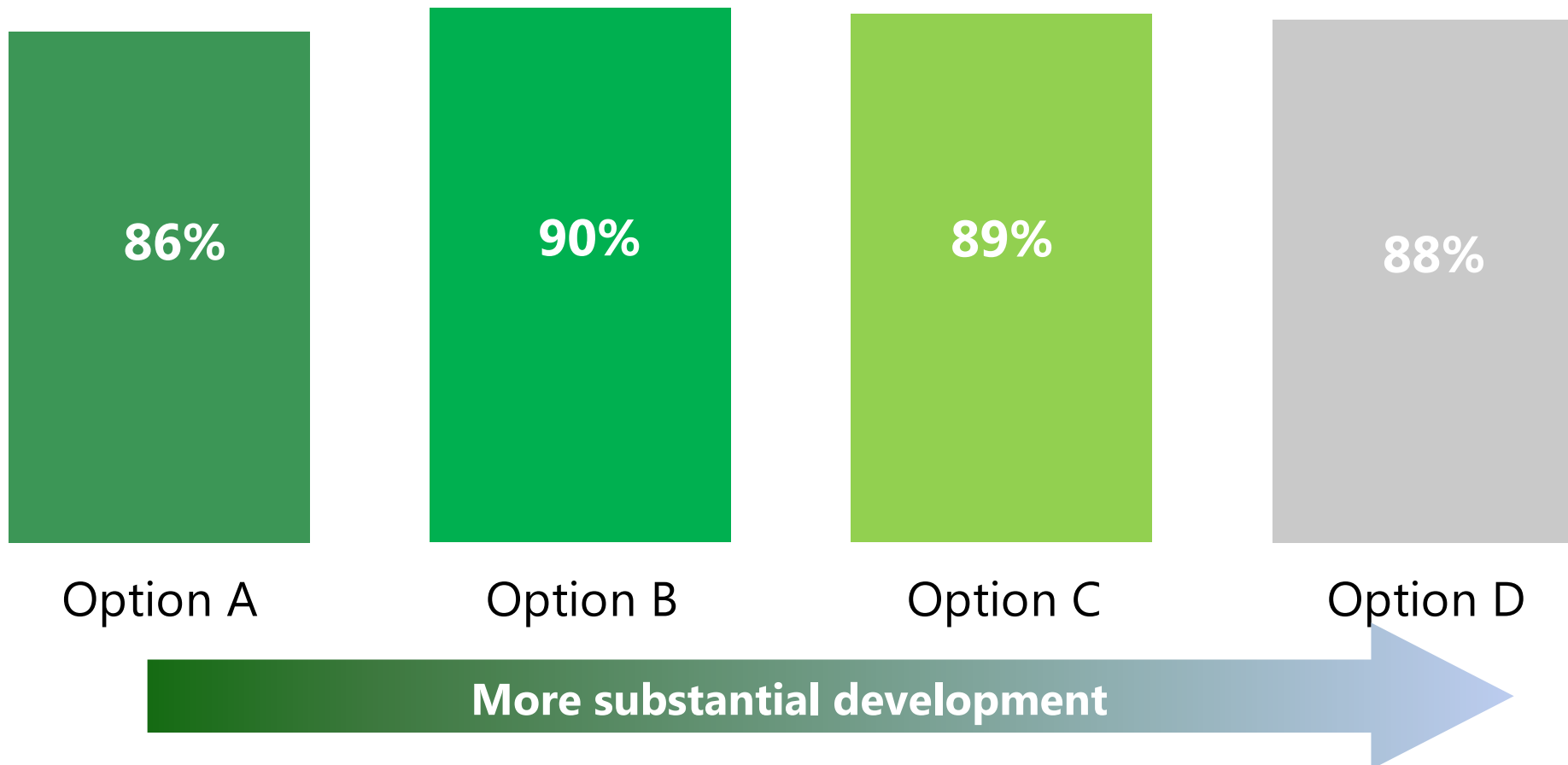
Q. I AM NOW GOING TO READ OUT SOME OF THE POSSIBLE OPTIONS FOR BUILDING NEW HOMES. AGAIN, IN PRINCIPLE, TO WHAT EXTENT WOULD YOU SUPPORT OR OPPOSE NEW HOMES BEING BUILT IN...IN THE FUTURE IF...?



Base: 1,002 English district council adults 16+ (telephone), 23 Jan-1 Feb 2015

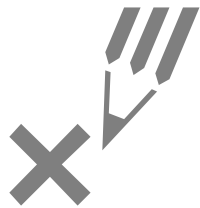
Infrastructure matters too

% OF THOSE BACKING EACH DEVELOPMENT OPTION AGREEING THAT "NEW HOMES SHOULD NOT BE BUILT UNLESS NEW INFRASTRUCTURE SUCH AS ROADS AND BUS ROUTES ARE PROVIDED"



Neighbourhood planning could provide more positive traction

Responded to consultation run
by council



49 41

% support / % oppose

Helped developed neighbourhood
or community plan



60 31

Base: 1,002 English district council adults 16+ (telephone), 23 Jan-1 Feb 2015

Source: Ipsos MORI

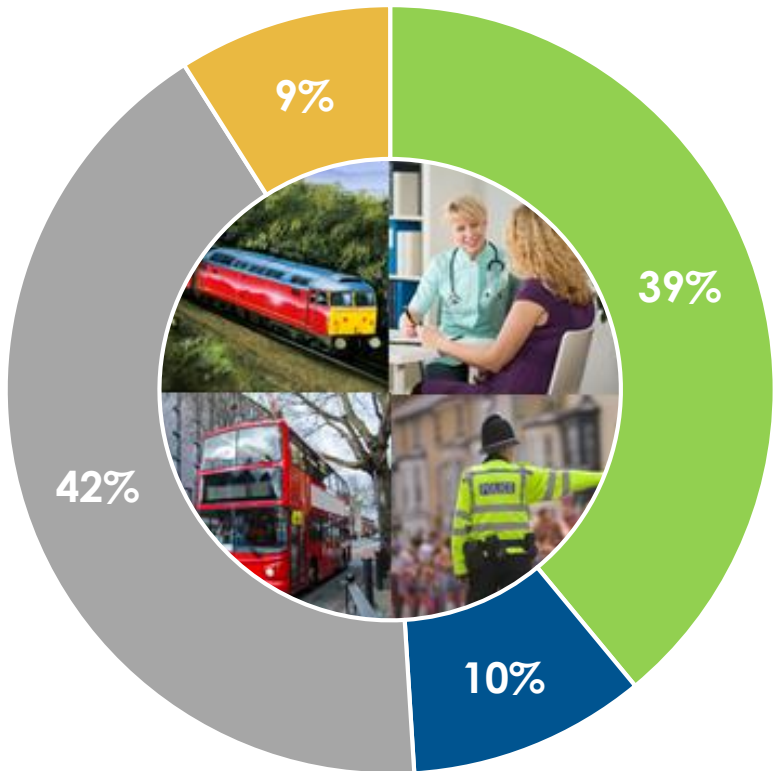
THE ROAD TO DEVOLUTION



Public trusts local councils to make decisions about public services more than national government, although just as many trust neither

Q2. WHO DO YOU TRUST MOST TO MAKE DECISIONS ABOUT HOW SERVICES ARE PROVIDED IN YOUR LOCAL AREA?

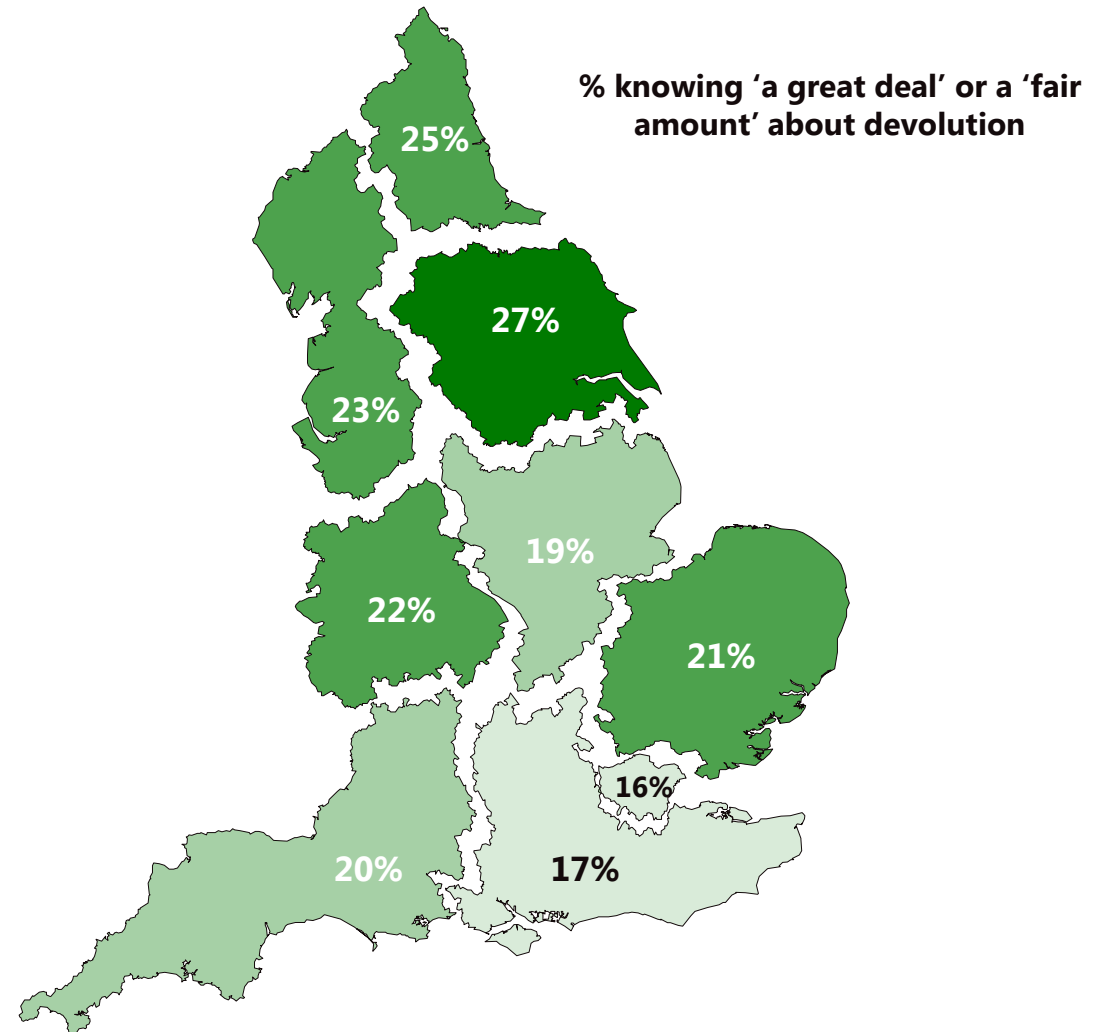
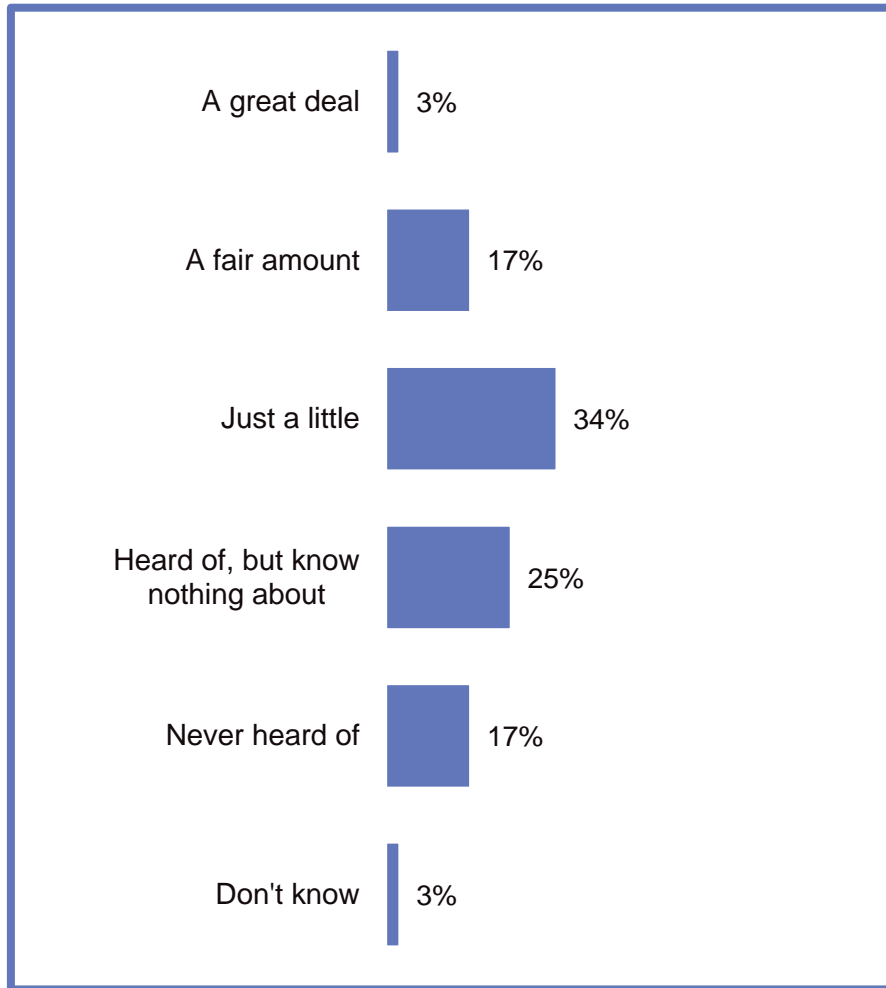
- Your local council
- National Government
- Neither of these
- Don't know



Base: All adults aged 16-75 in England (3831) Sept 2015

Three-quarters of public know either 'just a little' or 'nothing' about devolution proposals

Q5. BEFORE TODAY, HOW MUCH, IF ANYTHING, WOULD YOU SAY YOU KNEW ABOUT THE PROPOSALS FOR DEVOLVING MORE POWER TO LOCAL COUNCILS, OR GROUPS OF COUNCILS, WITHIN ENGLAND?



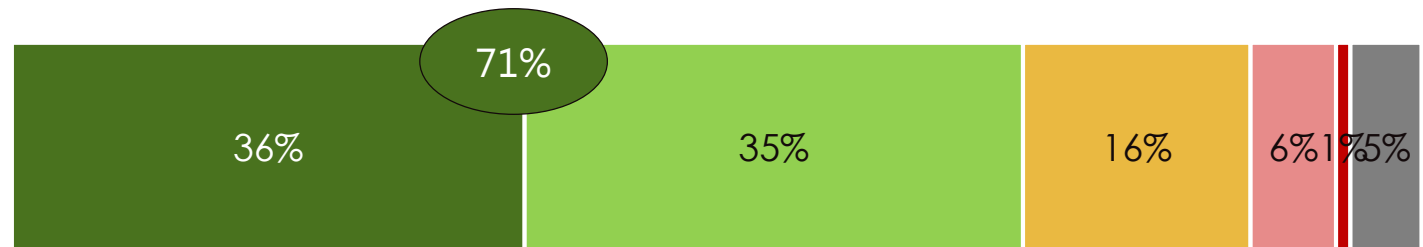
Base: All adults aged 16-75 in England (3831) Sept 2015

Majority believe public service standards should be equal no matter where they live...yet sizeable minority still support devolution if not guaranteed

Q. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS...?

■ Strongly agree
 ■ Tend to agree
 ■ Neither/nor
 ■ Tend to disagree
 ■ Strongly disagree
 ■ Don't know

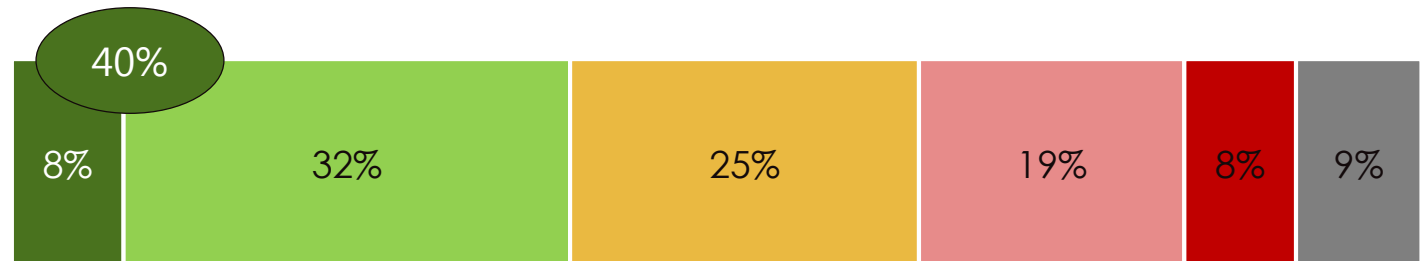
Standards of public services should be the same everywhere in England



The people who live in different parts of England should be able to decide for themselves what standard of public services should be prioritised in their area



I support devolving more powers to local councils, even if this means standards of public services may vary between local areas



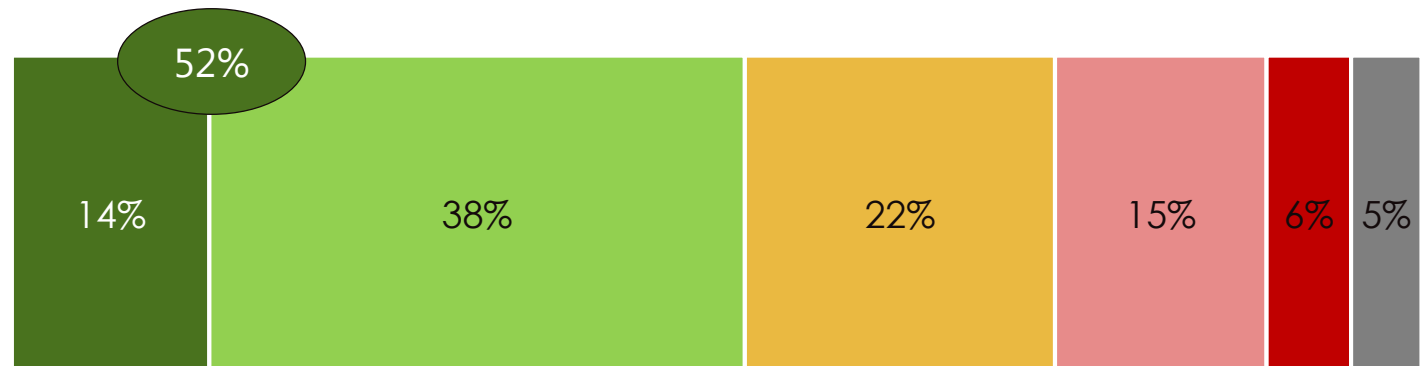
Base: All adults aged 16-75 in England (3831) Sept 2015

As long as services are delivered well, most do not care who makes the decisions, although local rather than national decision making is preferred

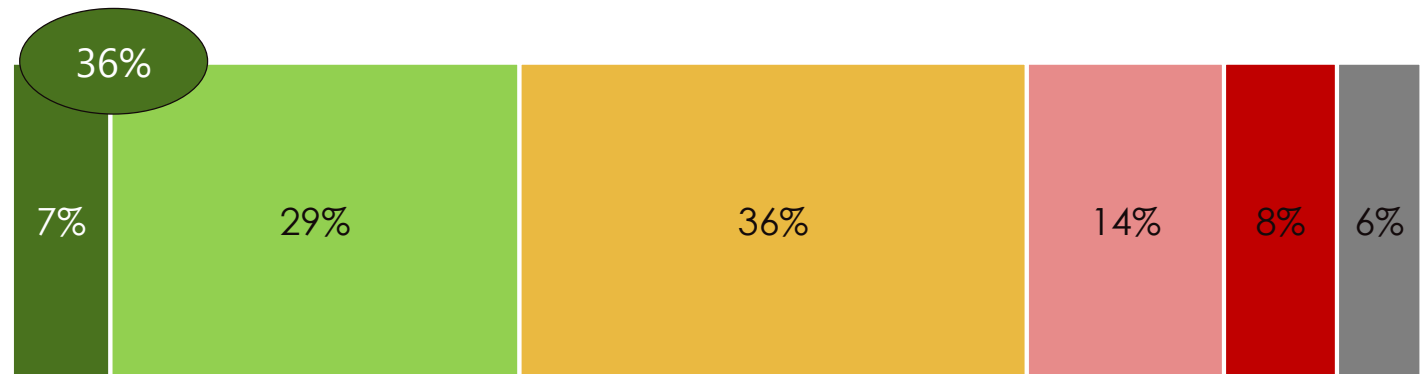
Q. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS...?

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know

I don't care who is responsible for making decisions about services in my local area so long as they are delivered well



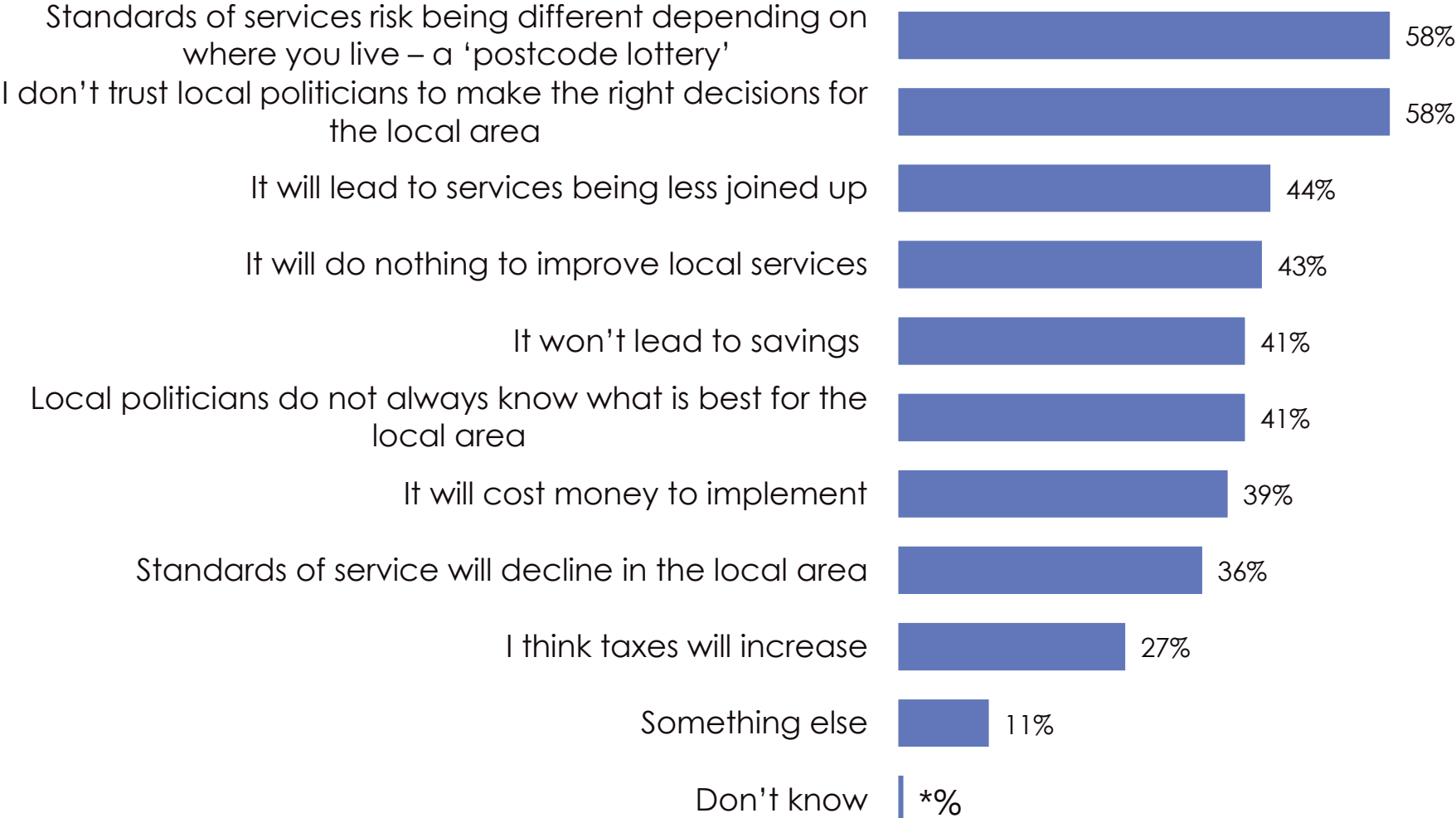
I trust local politicians/councillors more than national politicians/MPs and ministers to make decisions about services in my local area



Base: All adults aged 16-75 in England (3831) Sept 2015

Concerns that devolution will result in a 'postcode lottery' when it comes to service delivery – plus distrust in politicians

Q8B. WHY DO YOU SAY YOU OPPOSE DEVOLVING MORE POWERS TO LOCAL AREAS?

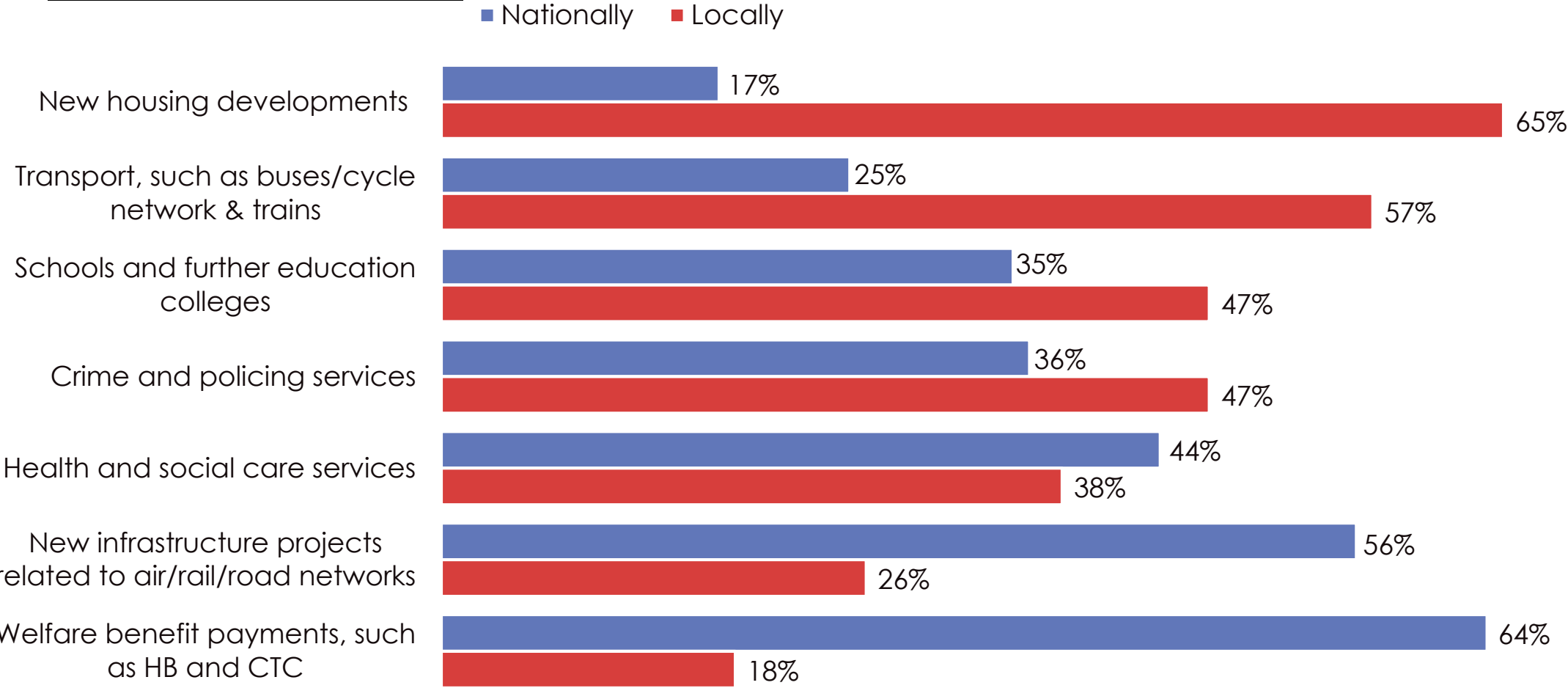


List provided

Base: All stating they don't support devolution at Q7 (656) Sept 2015

Majority support local decision making for housing and transport and tend to think decisions about crime/policing and education should also be taken locally

Q10. FOR EACH OF THE FOLLOWING SERVICES, DO YOU THINK DECISIONS SHOULD BE TAKEN NATIONALLY FOR ENGLAND AS A WHOLE OR LOCALLY BY LOCAL BODIES SUCH AS COUNCILS OR OTHER LOCAL SERVICE PROVIDERS?

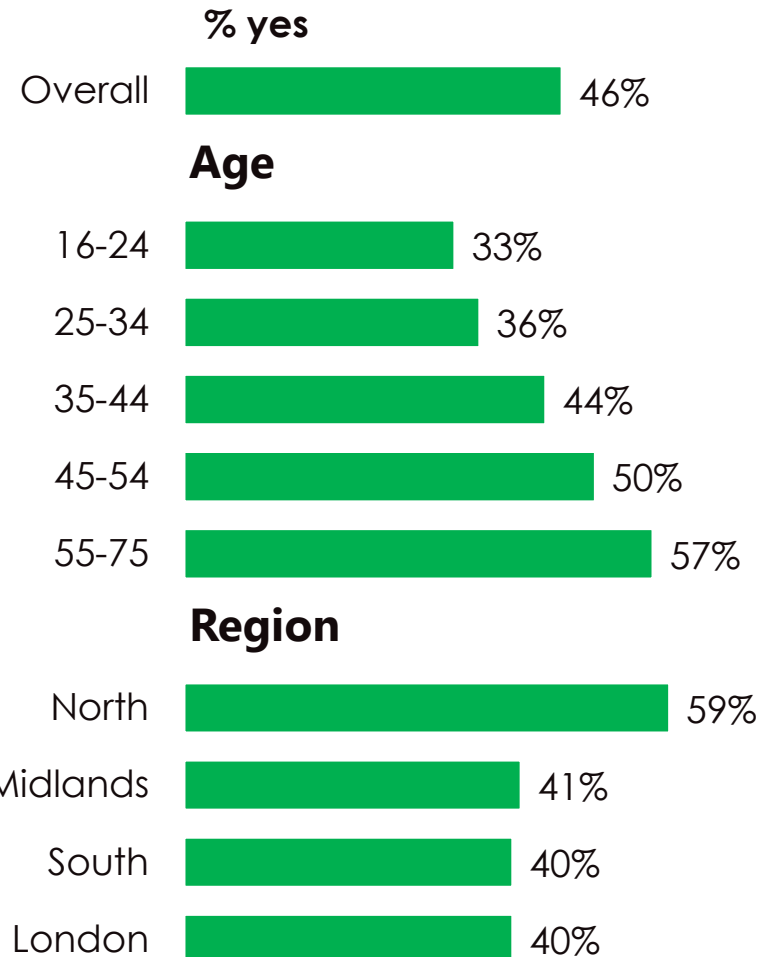
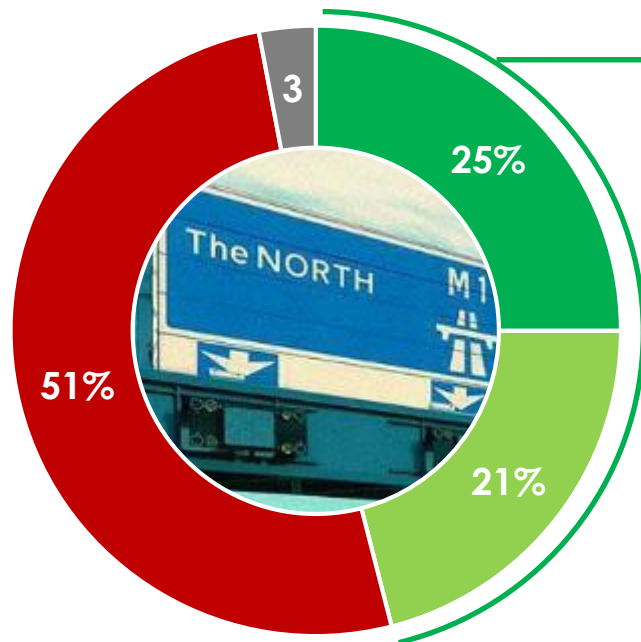


Base: All adults aged 16-75 in England (3831) Sept 2015

Half of public have not yet heard of the 'Northern Powerhouse'

Q11. BEFORE TODAY, HAD YOU HEARD OF THE TERM 'NORTHERN POWERHOUSE'?

■ Yes, definitely ■ Yes, think so ■ No ■ Don't know

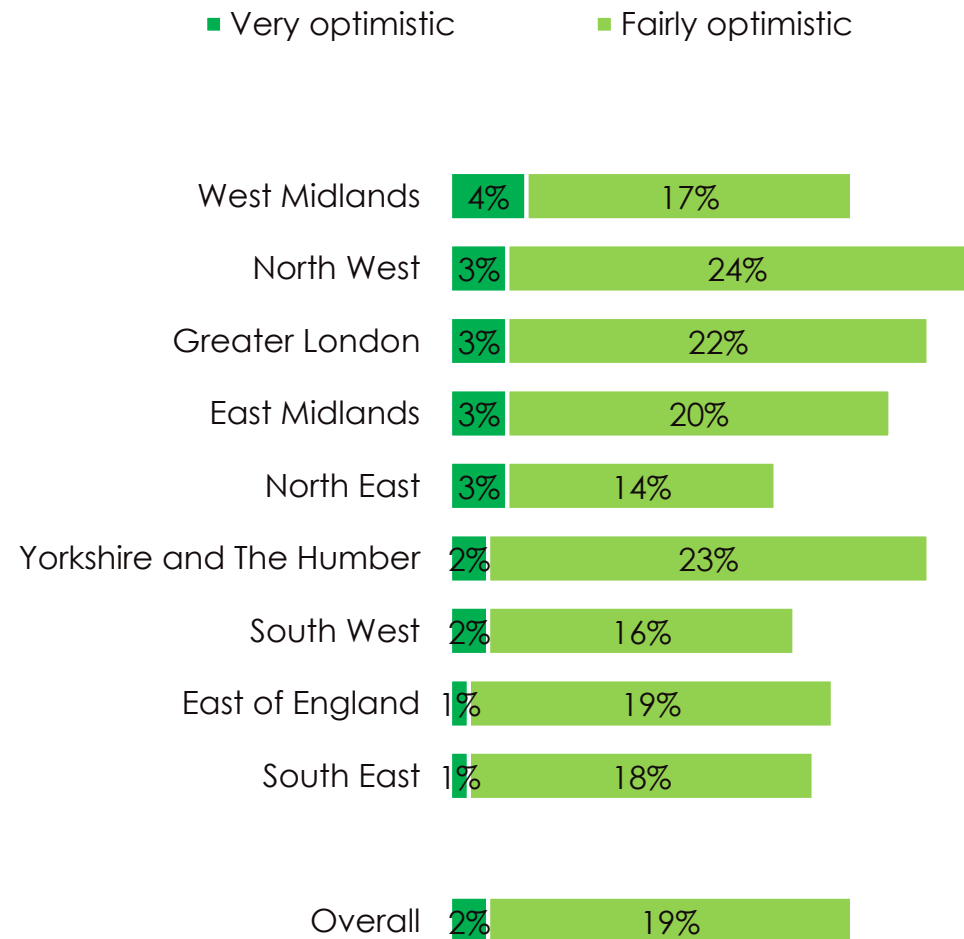
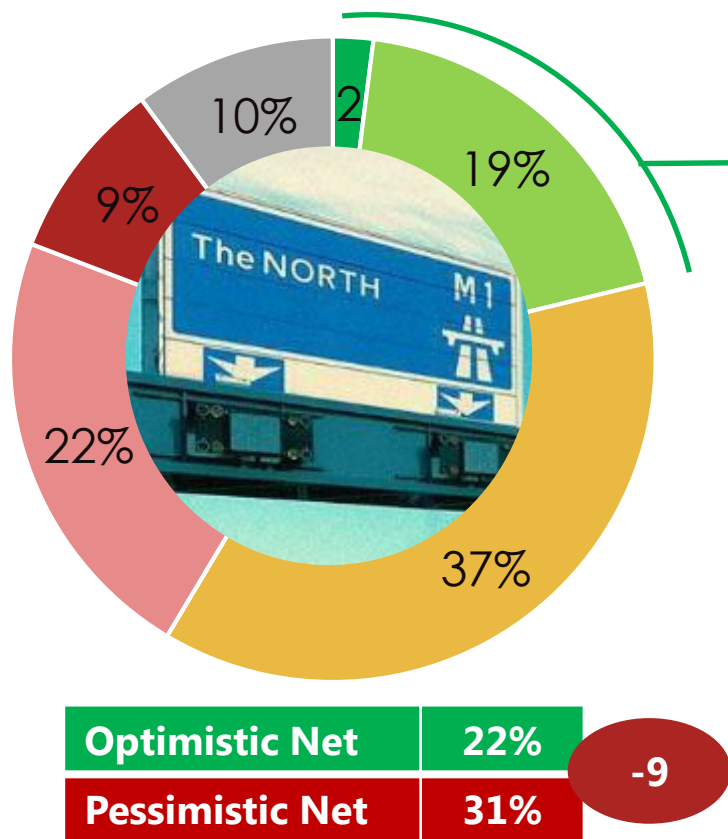


Base: All adults aged 16-75 in England (3831) Sept 2015

Only a fifth of the public are optimistic that the Northern Powerhouse will achieve its ambitions

Q13. TO WHAT EXTENT ARE YOU OPTIMISTIC OR PESSIMISTIC THAT THE 'NORTHERN POWERHOUSE' WILL ACHIEVE THESE AMBITIONS?

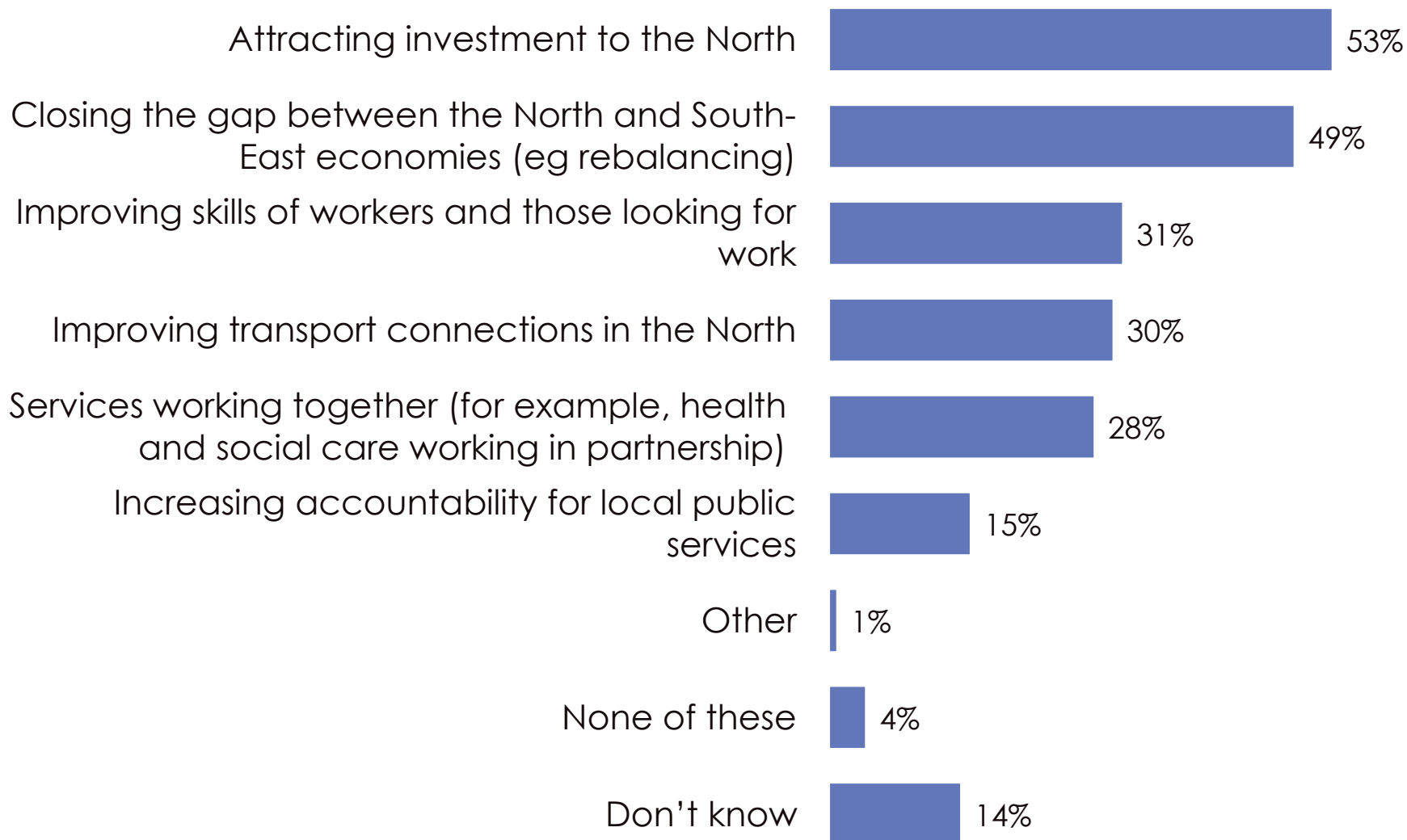
■ Very optimistic ■ Fairly optimistic ■ Neither/nor
■ Fairly pessimistic ■ Very pessimistic ■ Don't know



Base: All adults aged 16-75 in England (3831) Sept 2015

Attracting investment and rebalancing the north/south economic divide are the two key aims for the Northern Powerhouse

Q12. WHICH TWO OR THREE OF THE FOLLOWING, IF ANY, DO YOU THINK IS MOST IMPORTANT FOR THE 'NORTHERN POWERHOUSE' TO DELIVER?

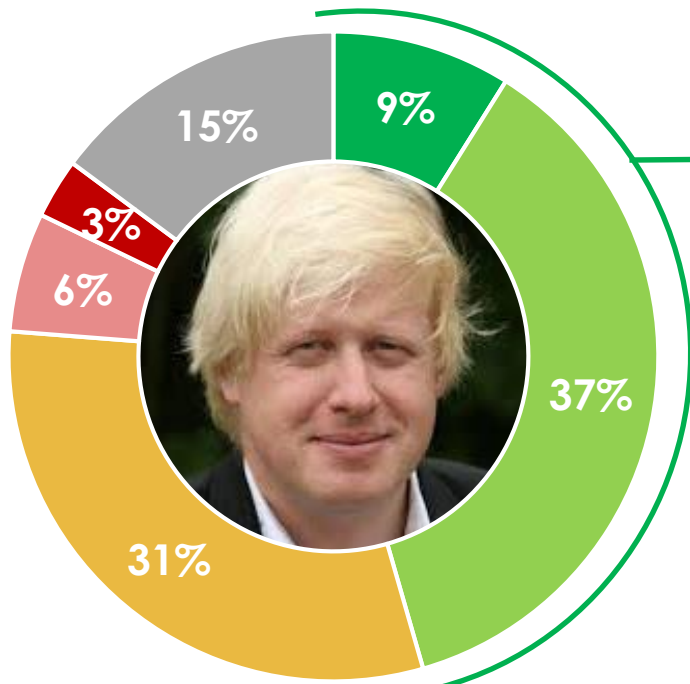


Base: All adults aged 16-75 in England (3831) Sept 2015

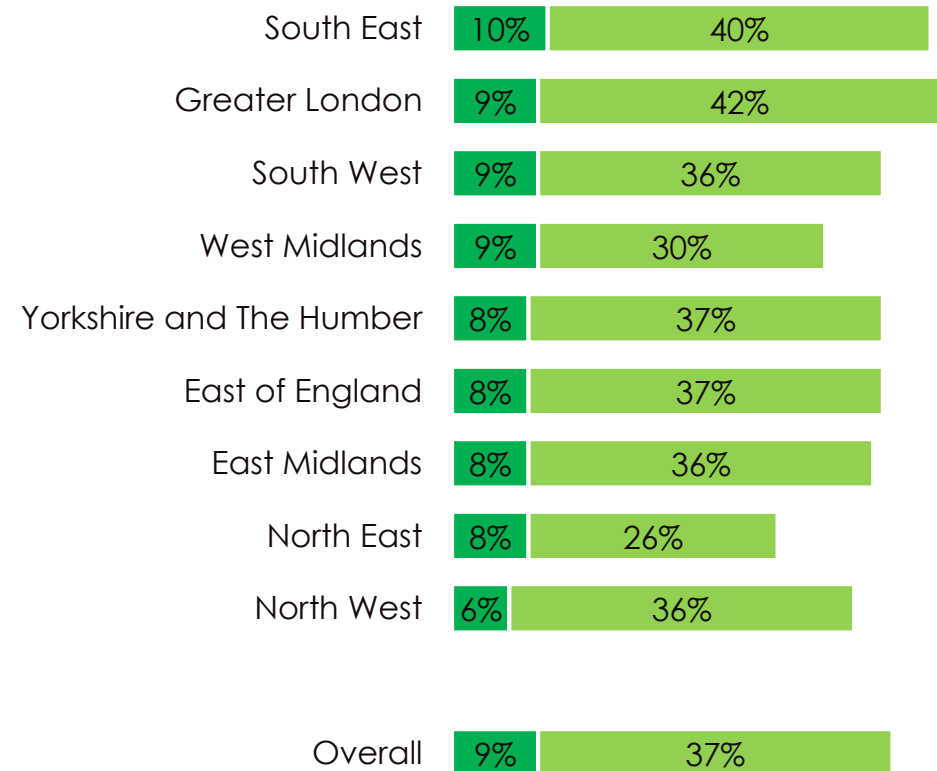
More people think the London mayor has had a positive than negative impact, even outside London

Q16. AS YOU MAY KNOW LONDON HAS AN INDEPENDENT ELECTED MAYOR, CURRENTLY BORIS JOHNSON. DO YOU THINK THAT HAVING AN INDEPENDENTLY ELECTED MAYOR HAS HAD A POSITIVE OR NEGATIVE IMPACT ON LONDON?

- Very positive
- Fairly positive
- No impact
- Fairly negative
- Very negative
- Don't know



- Very positive impact
- Fairly positive impact

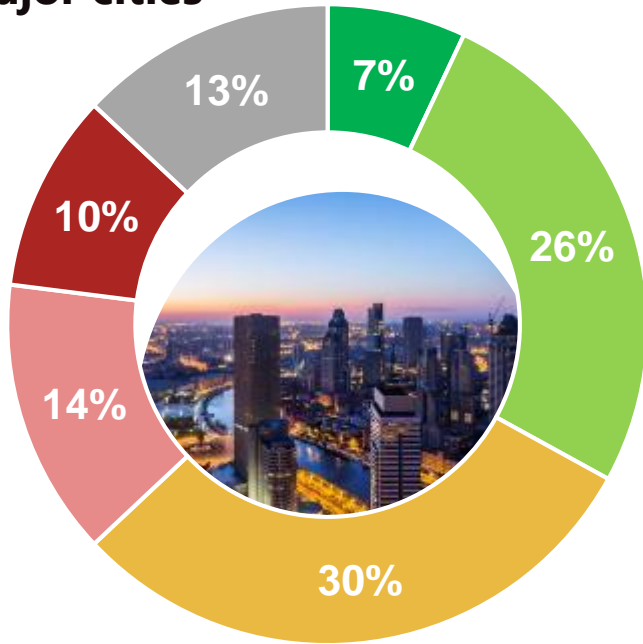


Base: All adults aged 16-75 in England (3831) Sept 2015

More support than opposition to devolving tax and spending powers to cities and counties – but limited

Q17. TO WHAT EXTENT, IF AT ALL, DO YOU SUPPORT OR OPPOSE GIVING SIMILAR POWERS AROUND TAX AND SPENDING FOR...

Major cities



Support	33%	+9
Oppose	24%	

STRONGLY SUPPORT

TEND TO SUPPORT

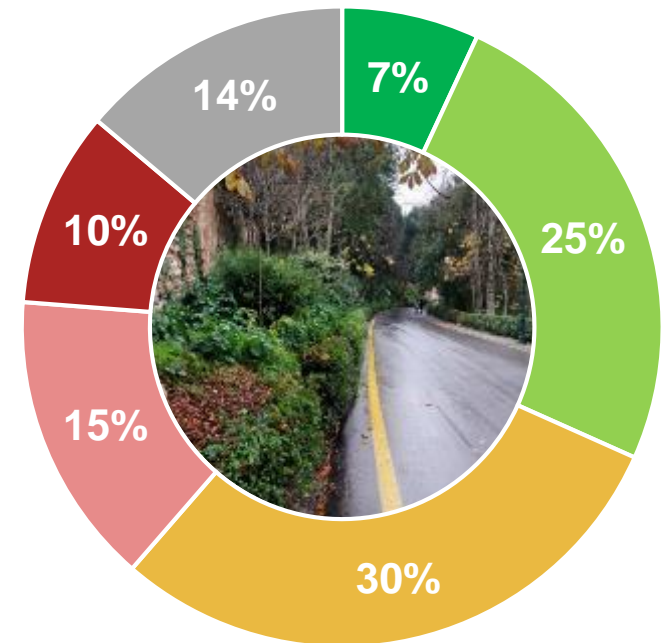
NEITHER SUPPORT NOR
OPPOSE

TEND TO OPPOSE

STRONGLY OPPOSE

DON'T KNOW

English counties



Support	31%	+6
Oppose	25%	

Base: All adults aged 16-75 in England (3831) Sept 2015

Changing social values





Generations

Contact

Ipsos MORI is starting a major programme of work focusing on generational differences, and the implications they have for public policy and politics.

Home

EU policy

Death Penalty

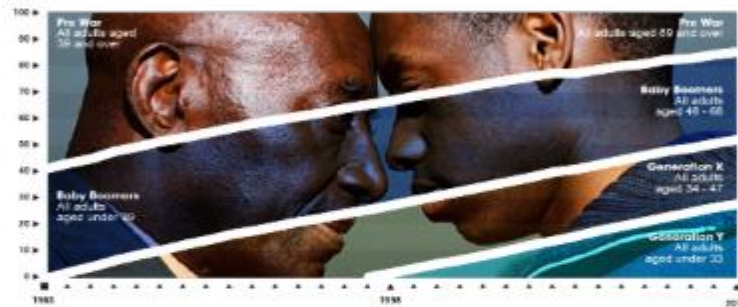
Gender Roles and Homosexuality

Gender roles (by gender)

Housing

Integration

Internet and Technology Use



[Open image in a popup window](#)

We're at a key point in the influence of different generations on our society. We now have four sizeable and culturally quite distinct cohorts co-existing, as the chart below shows. It's easy to miss this point when we discuss our national demographic profile, because we tend to focus on how the population is ageing. That is undoubtedly true – but it's also vital to understand that the current old are still dying out, and they have very different values and attitudes to our future old.

In his book *The Pinch*, David Willetts talks about how we're at a point of "generational equipoise", where the median person is around 40 years old and can expect to live to 80. We're also at a point of balance between generations – and changes in how much each makes up of the population are driving significant shifts in the national balance of opinion.

Reports and articles

Contact



Bobby Duffy

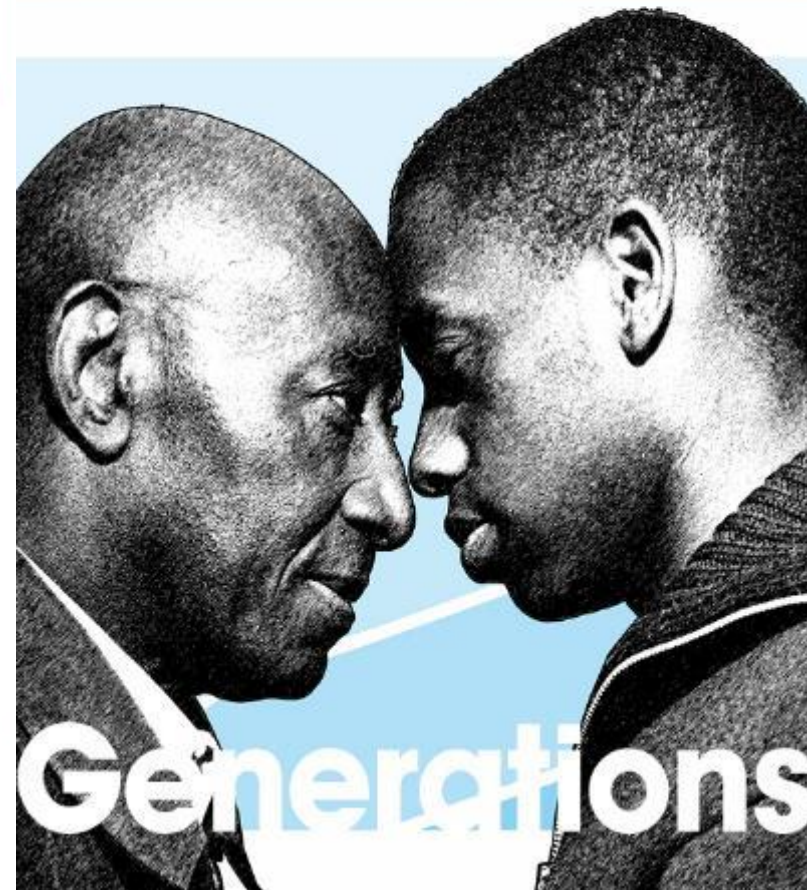
Managing Director
Social Research Institute
Ipsos MORI

Visiting Senior Research
Fellow
King's College London

020 7347 3000

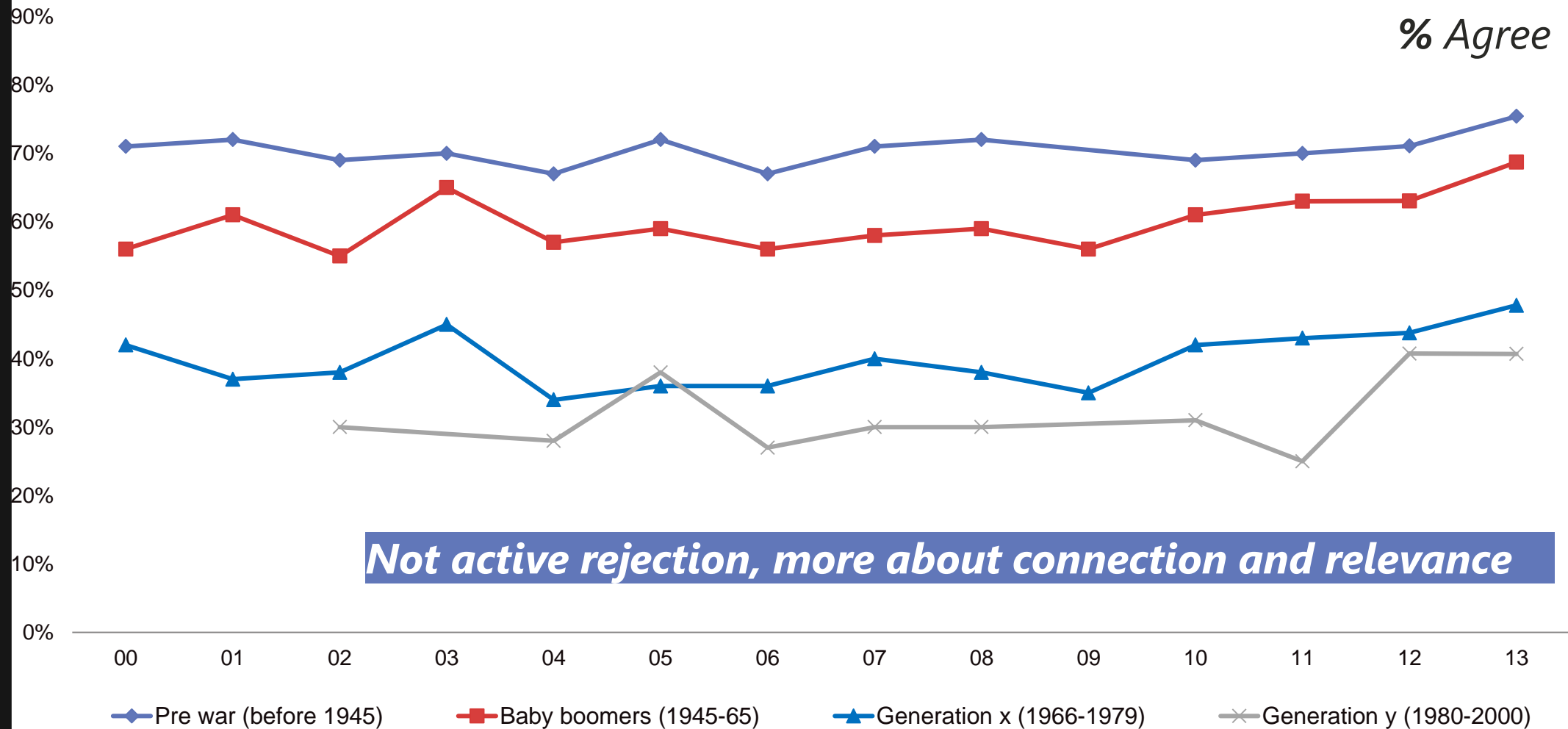
Follow Bobby on Twitter

[@BobbyIpsosMORI](#)



Overall measure of pride in welfare state is one of starkest illustrations of different perspectives...

"HOW MUCH DO YOU AGREE OR DISAGREE THAT ... THE CREATION OF THE WELFARE STATE IS ONE OF BRITAIN'S PROUDEST ACHIEVEMENTS."

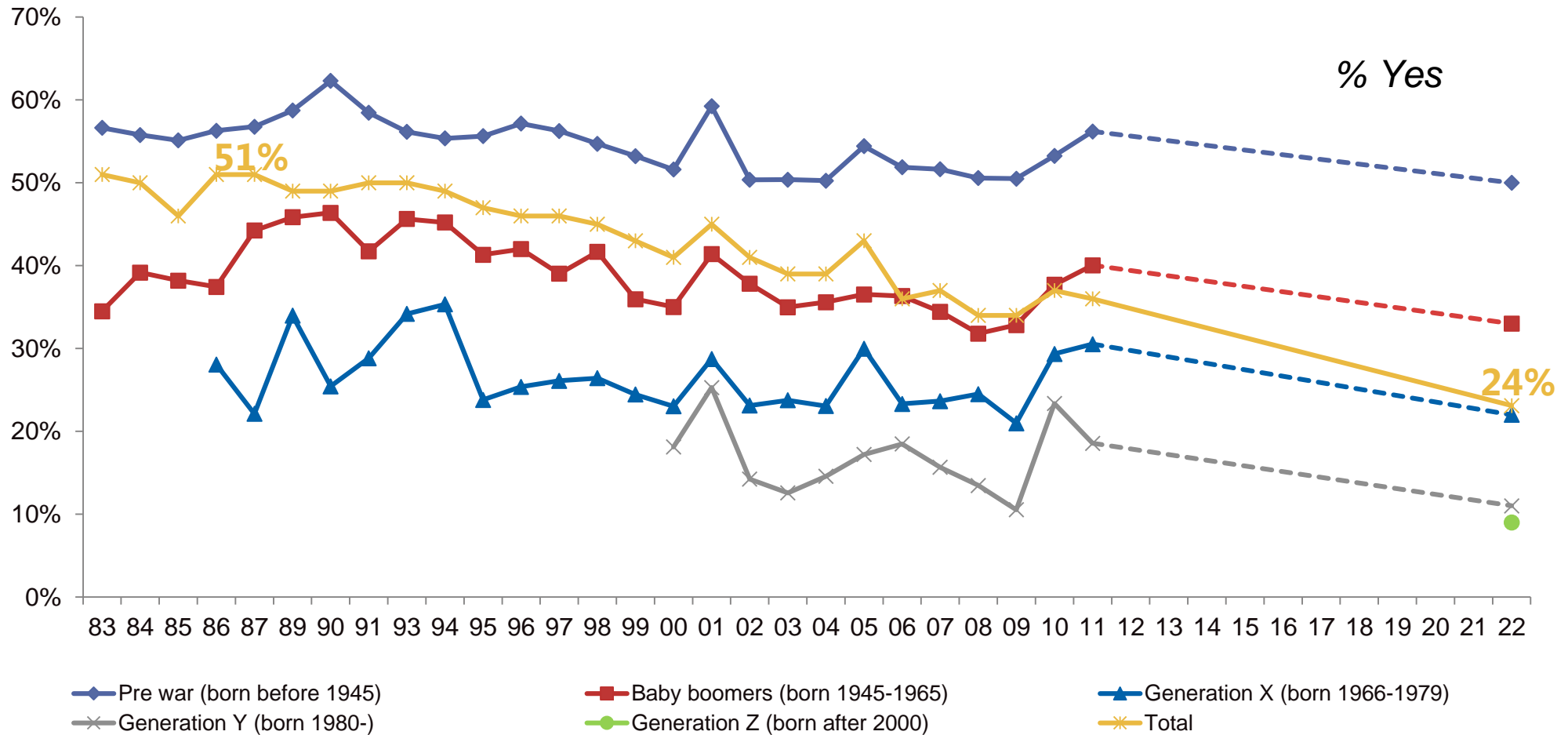


All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Similar pattern in attachment to political parties suggests worrying long-term trend for traditional political engagement...

DO YOU THINK OF YOURSELF AS A SUPPORTER OF ANY ONE POLITICAL PARTY?

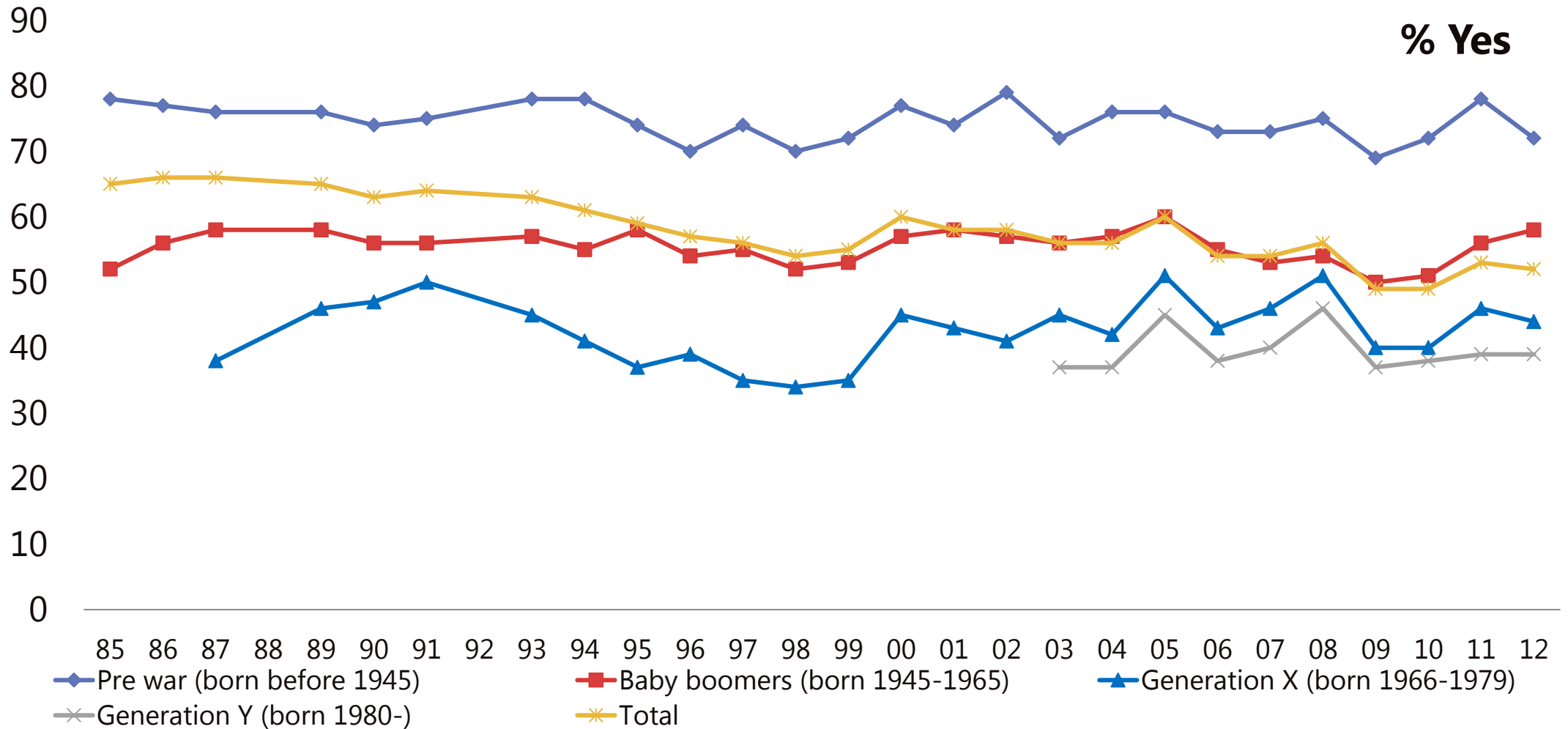


All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Also see a decline in religious observance

"DO YOU REGARD YOURSELF AS BELONGING TO ANY PARTICULAR RELIGION?"

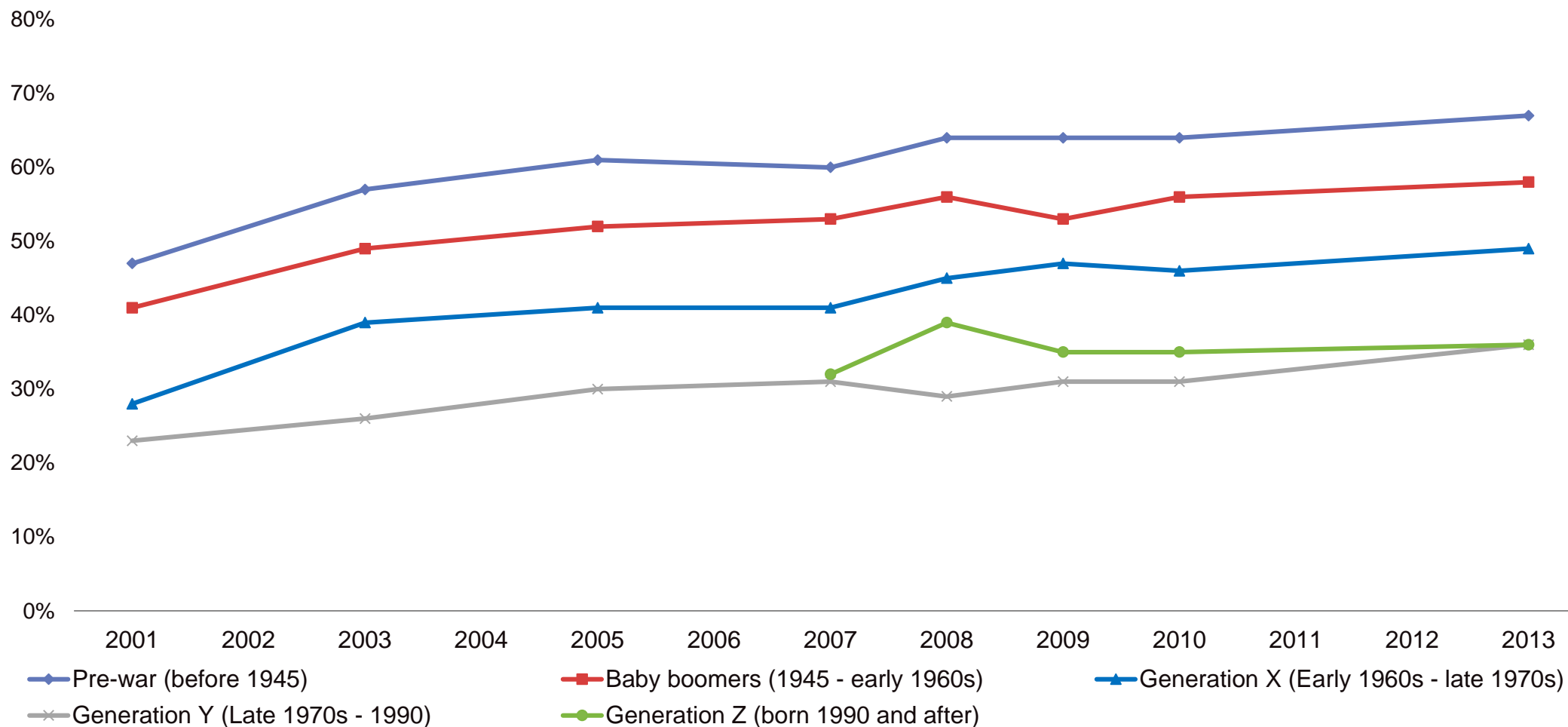


All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Signs of lower trust in others in younger generations (although sometimes higher trust in institutions)

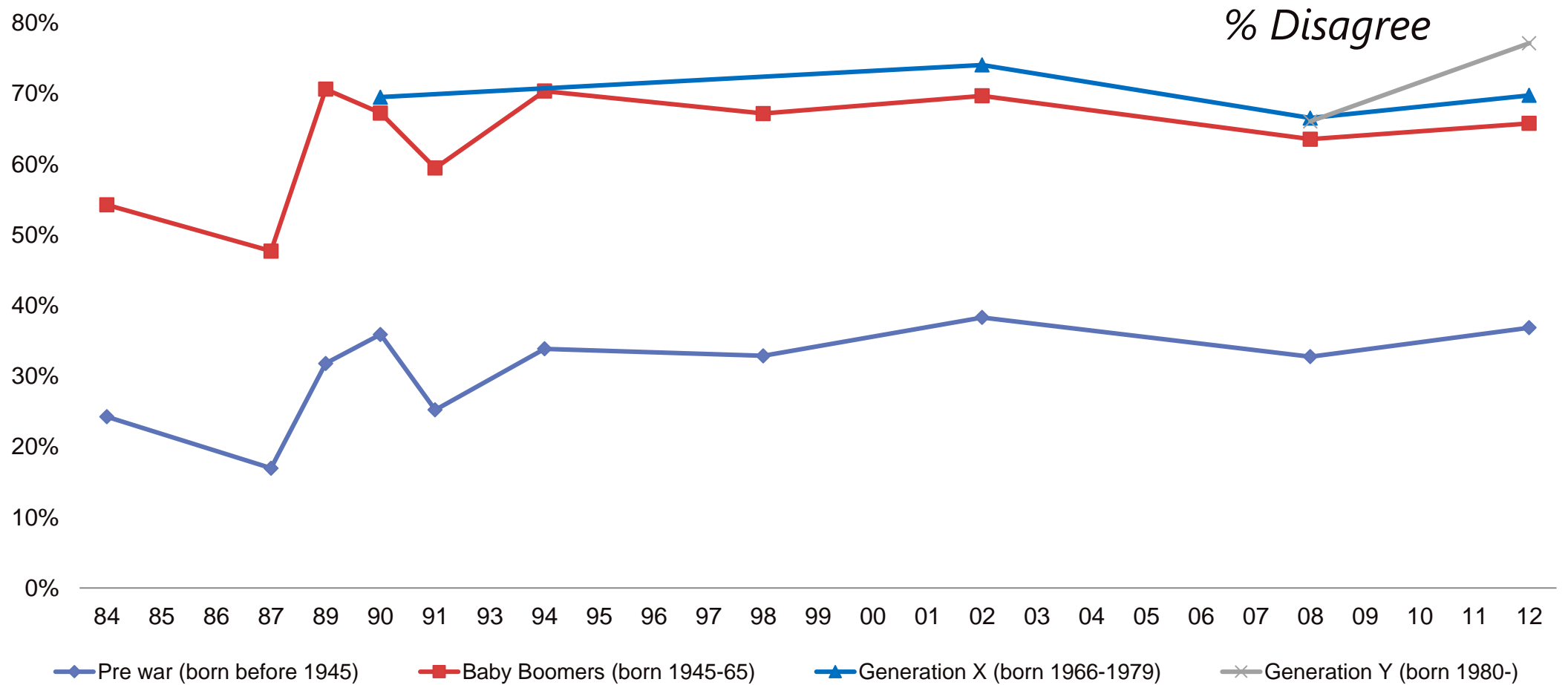
PROPORTION BY YEAR AND GENERATIONAL COHORTS, THINKING THAT MANY PEOPLE IN THEIR NEIGHBOURHOOD CAN BE TRUSTED



Source: Social Attitudes of Young People: A horizon scanning report (2013) Cabinet Office
Citizenship Survey 2001 to 2010/11; Community life for 2013 data

Modern views on gender equality here to stay?

"A HUSBAND'S JOB IS TO EARN MONEY; A WIFE'S JOB IS TO LOOK AFTER THE HOME AND FAMILY"

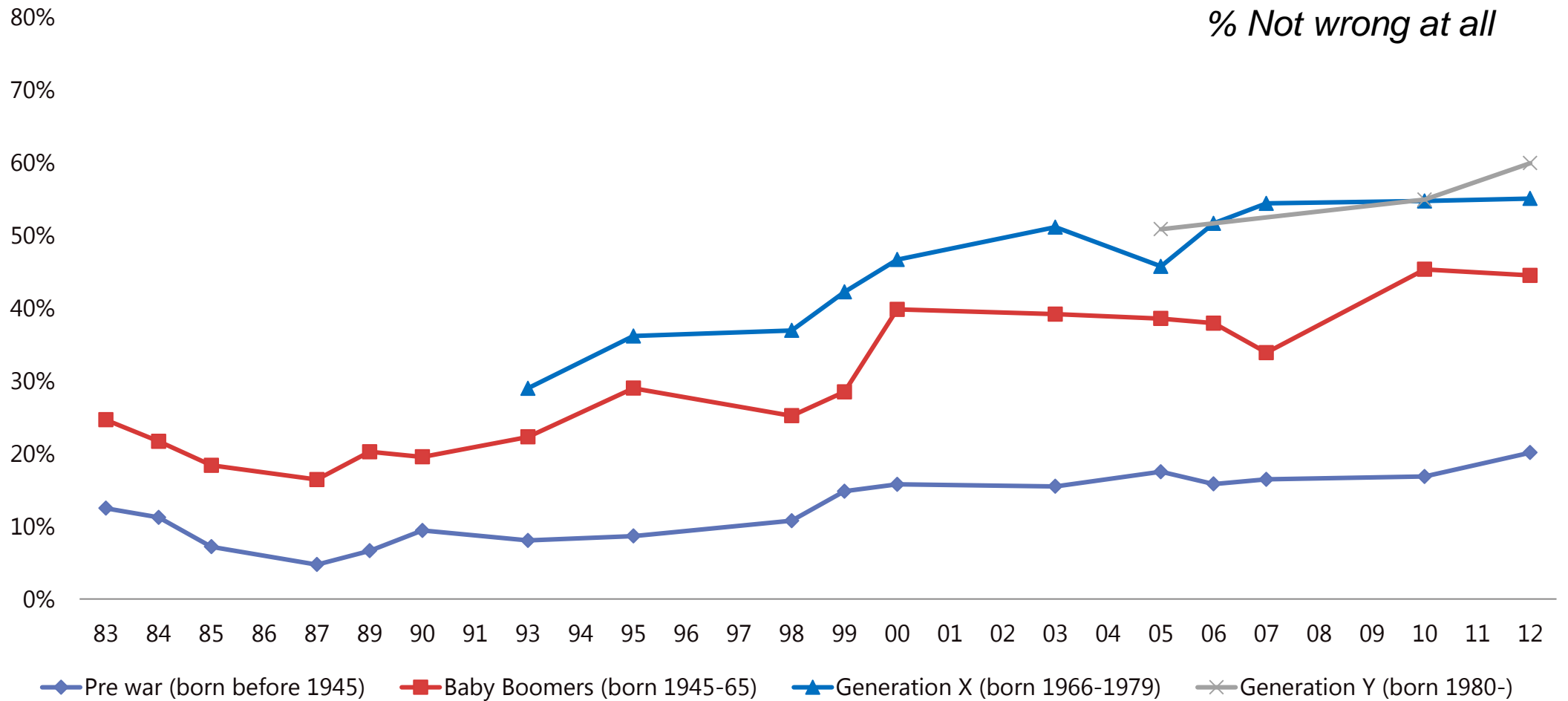


All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

Similar patterns on same-sex relations

ARE SEXUAL RELATIONS BETWEEN TWO ADULTS OF THE SAME SEX ALWAYS WRONG, ALMOST ALWAYS WRONG, WRONG ONLY SOMETIMES, OR NOT WRONG AT ALL?



All data points represent > 200 responses

Source: Ipsos MORI reanalysis of British Social Attitudes

For more information

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