



State of the State 2017-18

Austerity, government spending, social care and data



Ipsos MORI Survey on behalf of Deloitte LLP for *The State of the State 2017-18*

For *The State of the State 2017-18* Deloitte LLP commissioned Ipsos MORI to survey c.1000 UK adults on their attitudes to public service spending and austerity; social care services and personal data sharing. We found that...

- The public mood has changed since 2010 – less people support cuts and more people want services to be extended even if this means tax increases
- Attitudes to social care services are negative and there is a significant proportion of people who have not taken steps to prepare for their social care needs
- People are more confident and comfortable with government organisations using their personal data than companies



Austerity and government spending

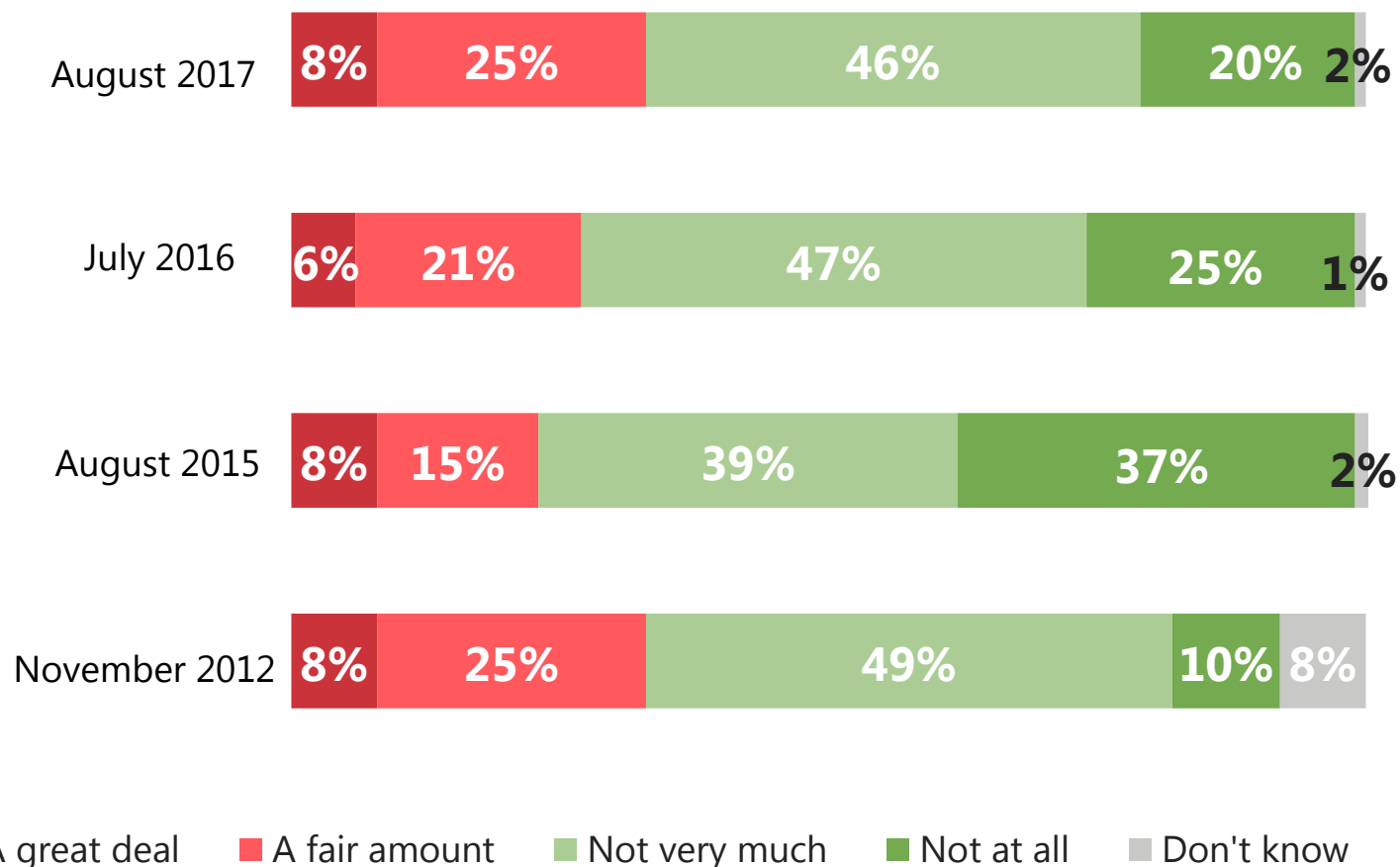
- Most people say they remain little affected by the cuts, but the proportion who *are* feeling it continues to rise since 2015.
- There has been a notable shift in public opinion. The level of support for cutting public services to reduce the national debt has halved since 2010 and people are half as likely to be willing to accept less from public services.
- Protecting the NHS and healthcare from further cuts is the clear priority.
- People increasingly want to see investment in public services - 63% think it is important to extend services rather than reducing taxes or keeping spending at the same level, similar to 2000 but with more support for extending services than in 2009.



Austerity is being felt more and more– a third (33%) are feeling the impact of the cuts – the same proportions as in 2012

Q

As you may know, over recent years 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?

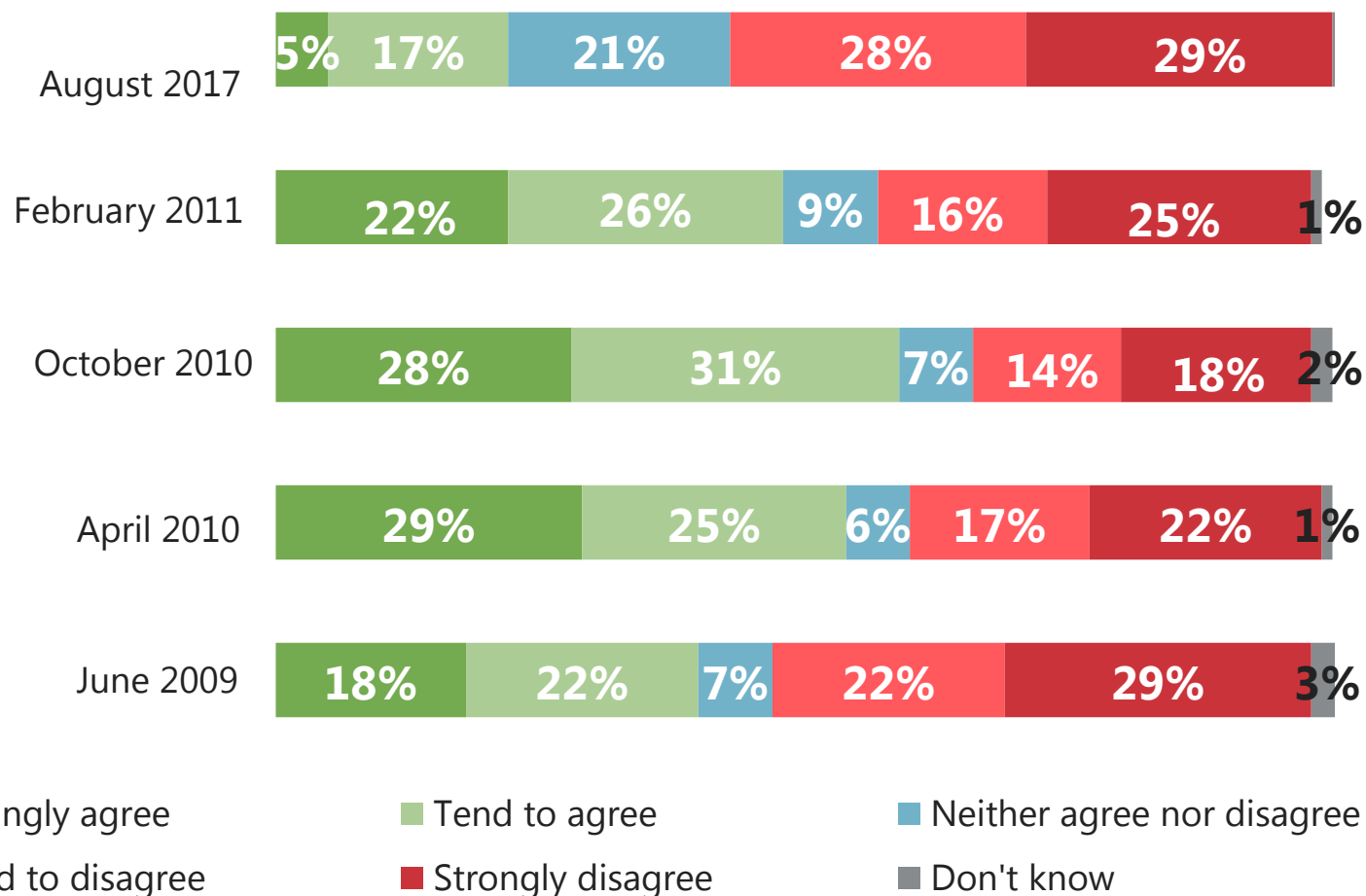


Base: 1071 UK adults 15+

And the level of support for cutting public service spending has halved since 2010 - only a fifth (22%) now think there is a real need to do this



There is a real need to cut spending on public services in order to pay off the very high national debt we now have...

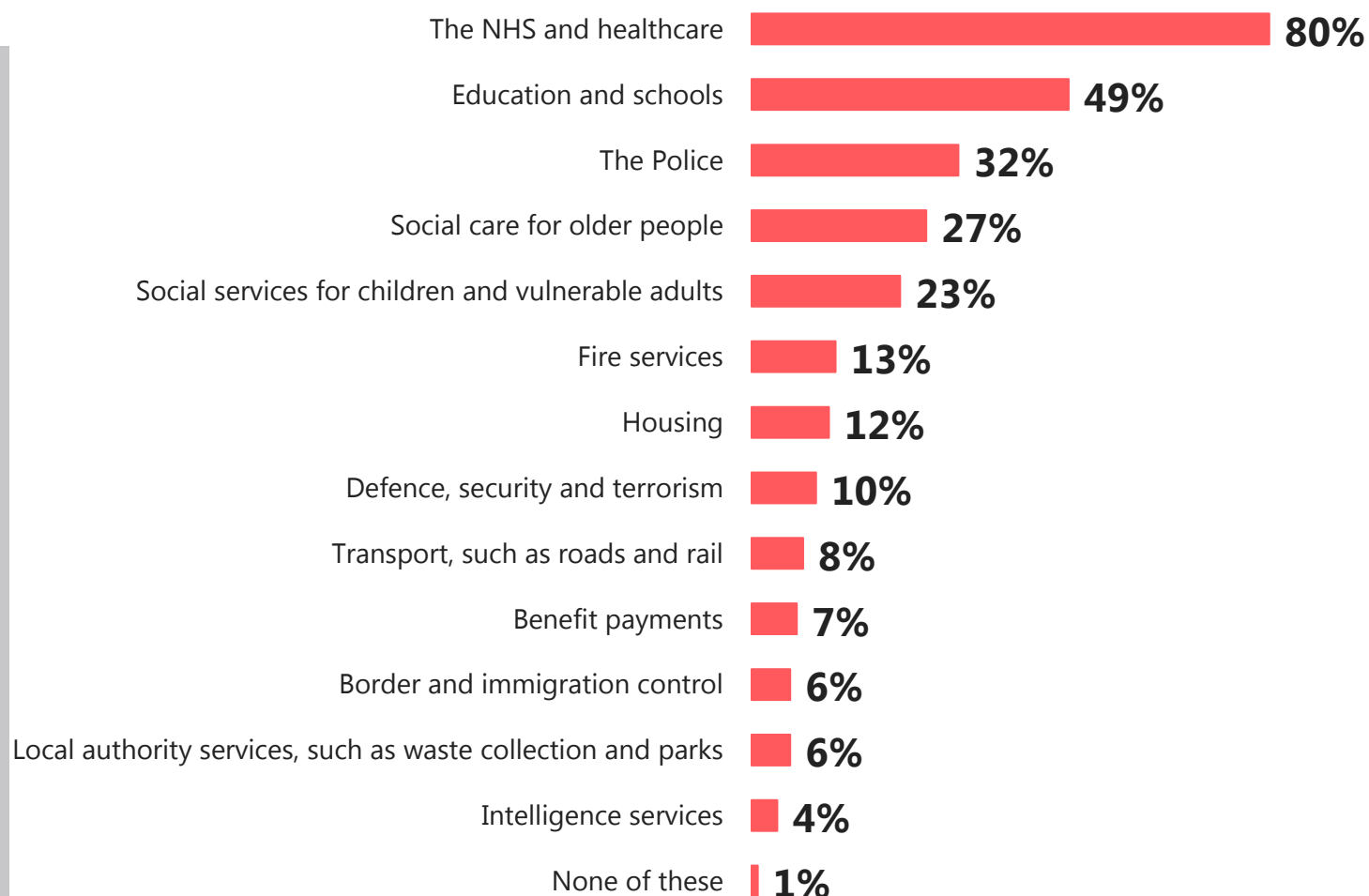


Base: Half sample 536 UK adults 15+

The public overwhelmingly want to prioritise protecting the NHS and healthcare from further cuts – education and police also important

Q

Which two or three, if any, of the following main areas of public spending do you think should be protected from any cuts?

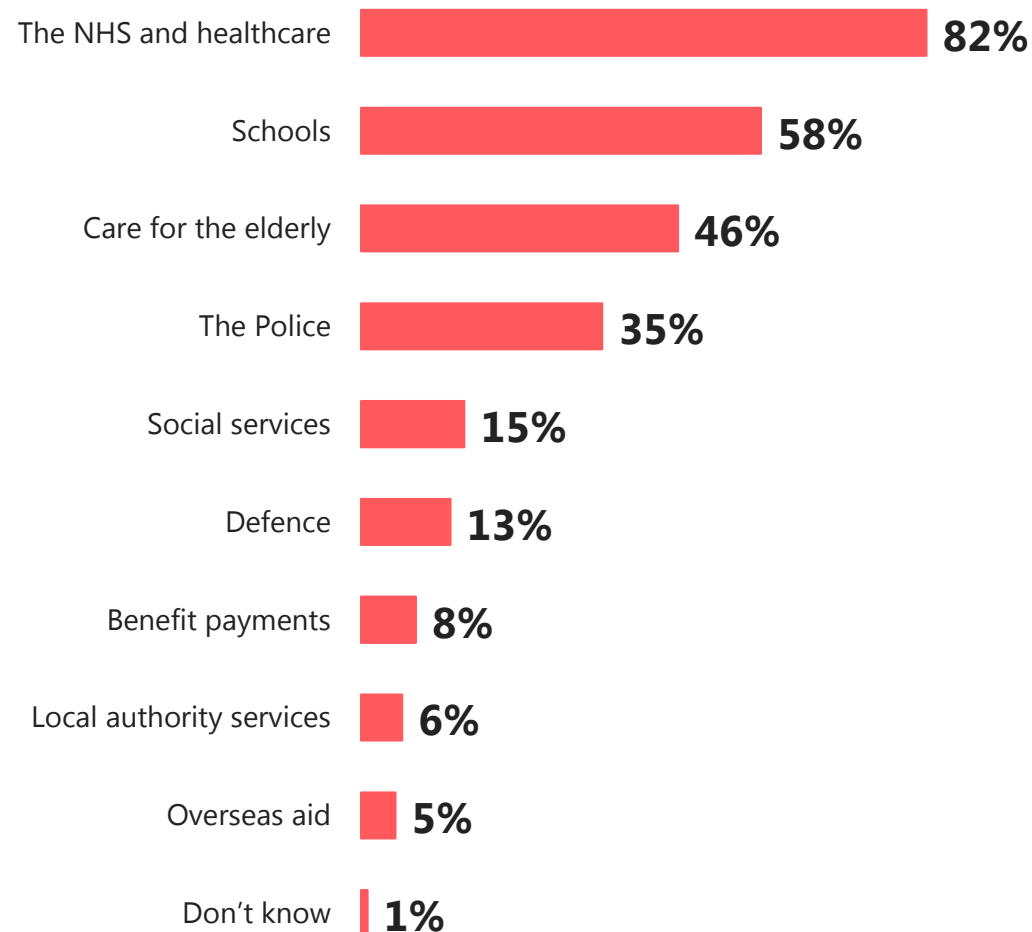


Base: 1071 UK adults 15+

And these seem to be a consistent priority – in 2009, NHS and education were areas seen as most important to protect...

Q

Which two or three, if any, of the following main areas of public spending do you think should be protected from any cuts?



Base: All who think some services should be protected (773) GB adults 19-21 June 2009

Protecting certain areas from further cuts are more important for different groups....

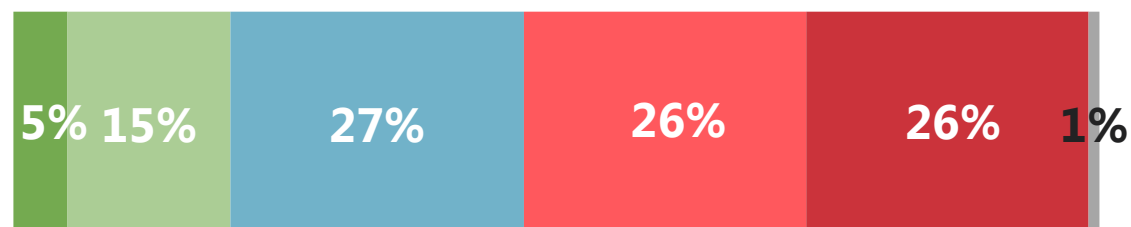
Areas to protect from further cuts	More important for.....
NHS	Northern Ireland; Full time workers
Education	15-24s; parents; ABC1s; Graduates; BMEs
The Police	White
Social care for older people	Over 65s, White
Social services for children and vulnerable adults	Women; White
Housing	Renters; BME; Londoners; Wales

The number of people personally willing to receive less from public services has also more than halved since 2010 – now only 20% compared with nearly half (47%) in 2010

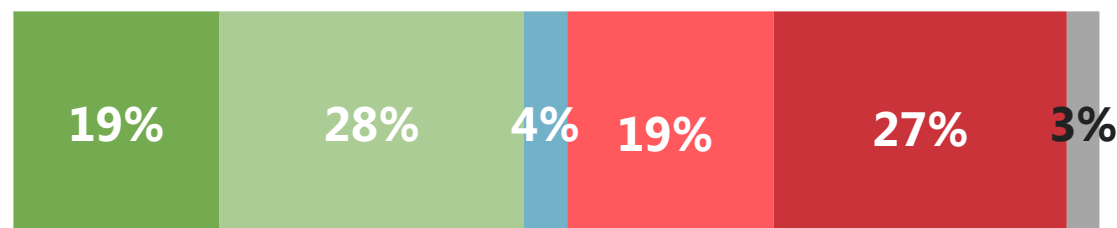


I am personally happy to accept less from public services than I currently get in order to pay off the very high national debt we now have....

August 2017



April 2010



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

Base: Half sample 535 UK adults 15+



Ipsos MORI

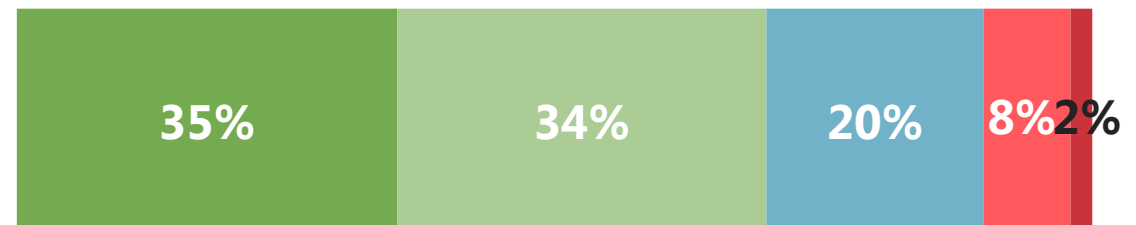
Survey on behalf of Deloitte LLP for *The State of the State 2017-18*

And the majority (69%) are now concerned that government and public services won't do enough in the future compared to half (50%) in 2010

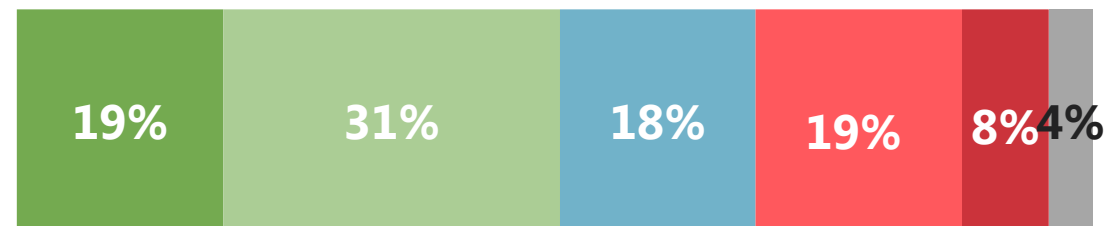


I am worried that government and public services will do little to help people in the years ahead....

August 2017



May 2010



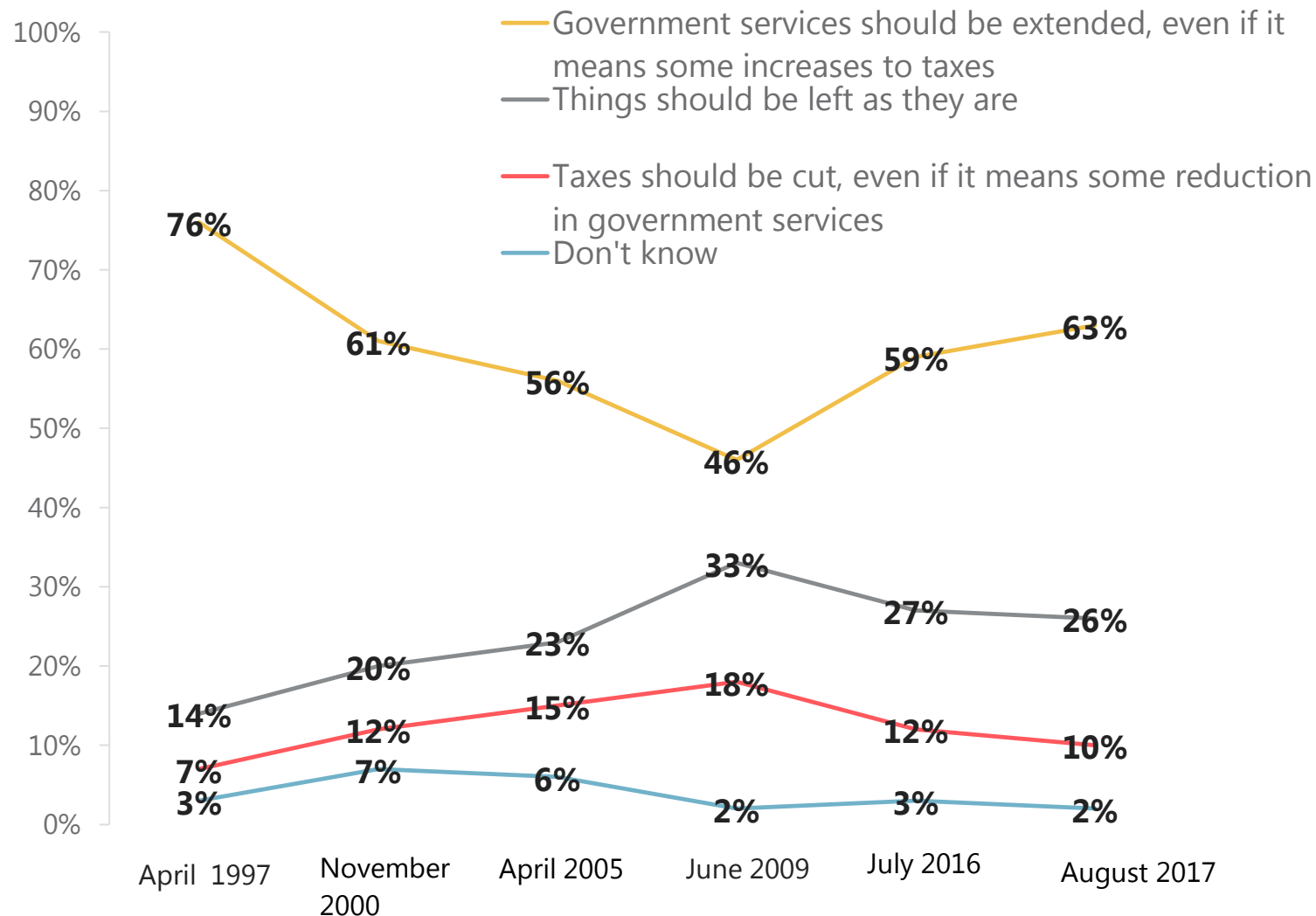
Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know

Base: Half sample 536 UK adults 15+

Support for extending government services even if there is an increase in taxes has continued to grow...

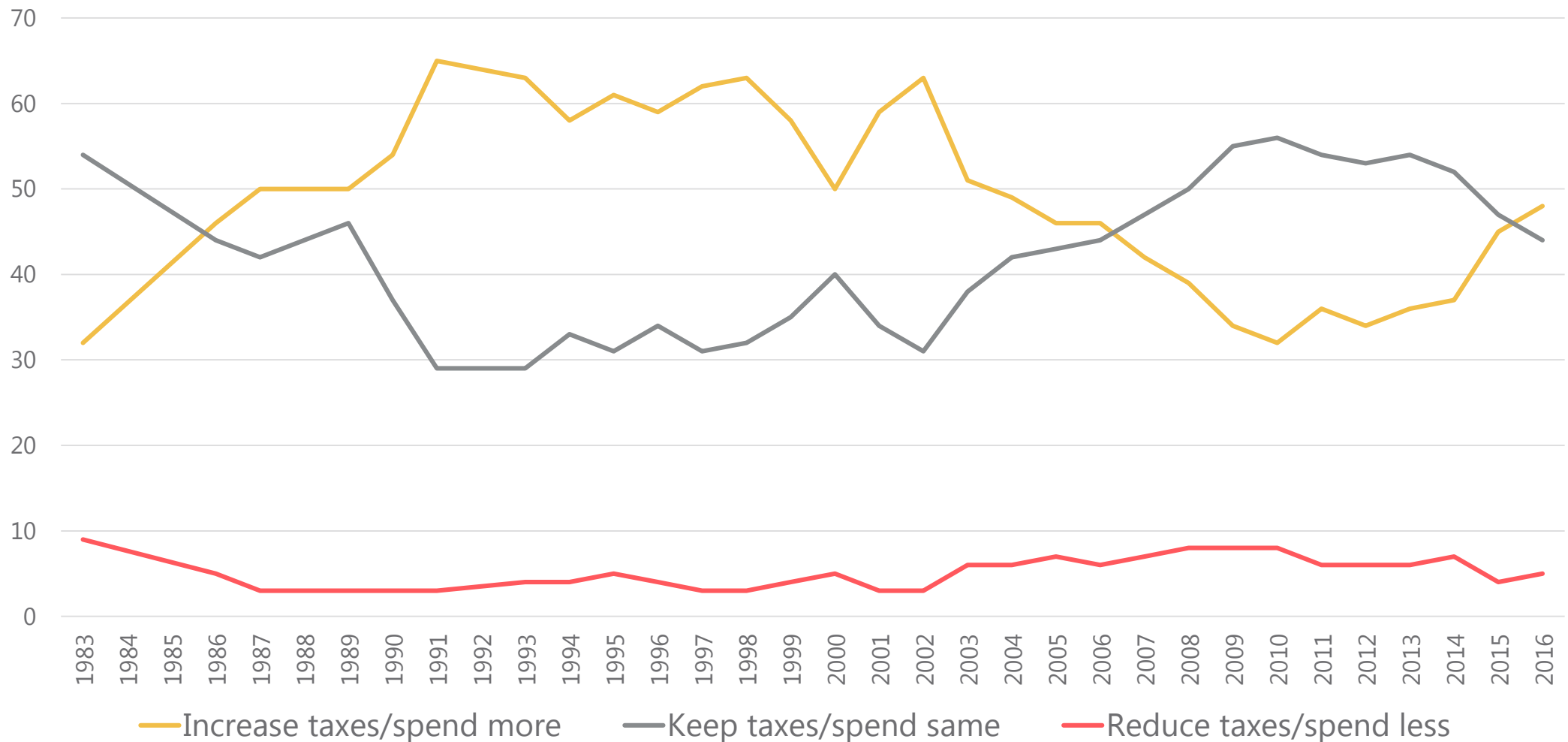
Q

People have different views about whether its is more important to reduce taxes or keep up government spending. How about you? Which of these statements comes closest to your own view?



Base: c,1000 GB adults

There has been a similar pattern in latest British Social Attitudes study – with balance of opinion shifted towards a preference to spend more



Source: British Social Attitudes Survey

But support for tax cuts is higher among some of the groups most impacted by austerity (inc. BMEs and social renters)

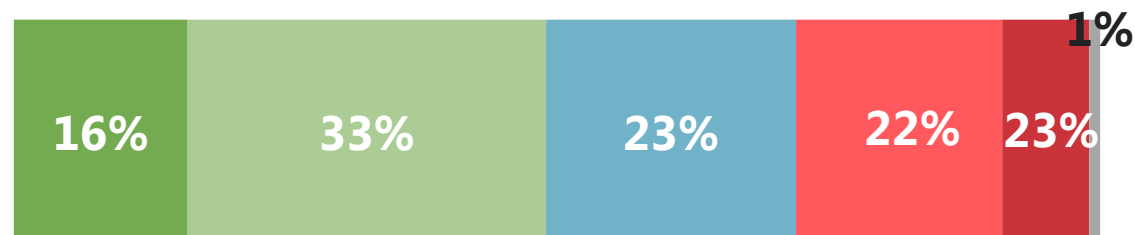
Most likely to support extending services	Most likely to support tax cuts
Graduates	Male
North and South	Northern Ireland and Wales
High income	45-54
Homeowners	Social renters
White	BME
Social grades AB	

Yet some contradictions – half (49%) think public services have done too much and people should take more responsibility for their own lives – although less people think this than in 2010

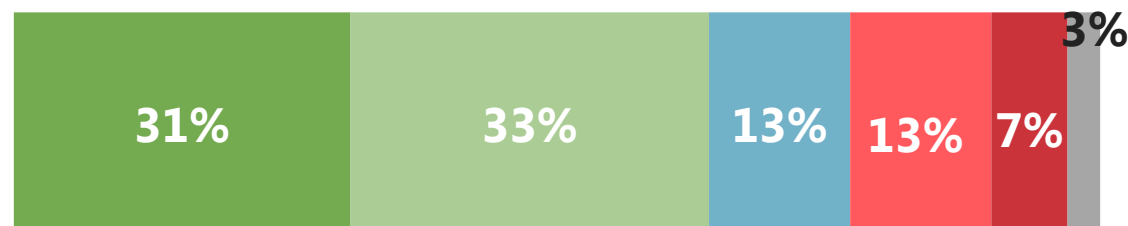


In recent years government and public services have tried to do too much, and people should take more responsibility for their own lives....

August 2017



May 2010



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

Base: Half sample 535 GB adults 15+

SOCIAL CARE

- People do not generally have faith in the social care system - only a fifth think government has the right social care policies and two thirds lack confidence social care services will be available when they need them.
- There is also widespread lack of awareness about how and who provides social care services – the majority think the NHS provides social care services and just under half (47%) wrongly think social care is free at the point of need.
- Meanwhile, only a third of people (35%) are preparing financially to a some or great extent for their social care needs in the future, yet 55% people think it is their own responsibility to do so.



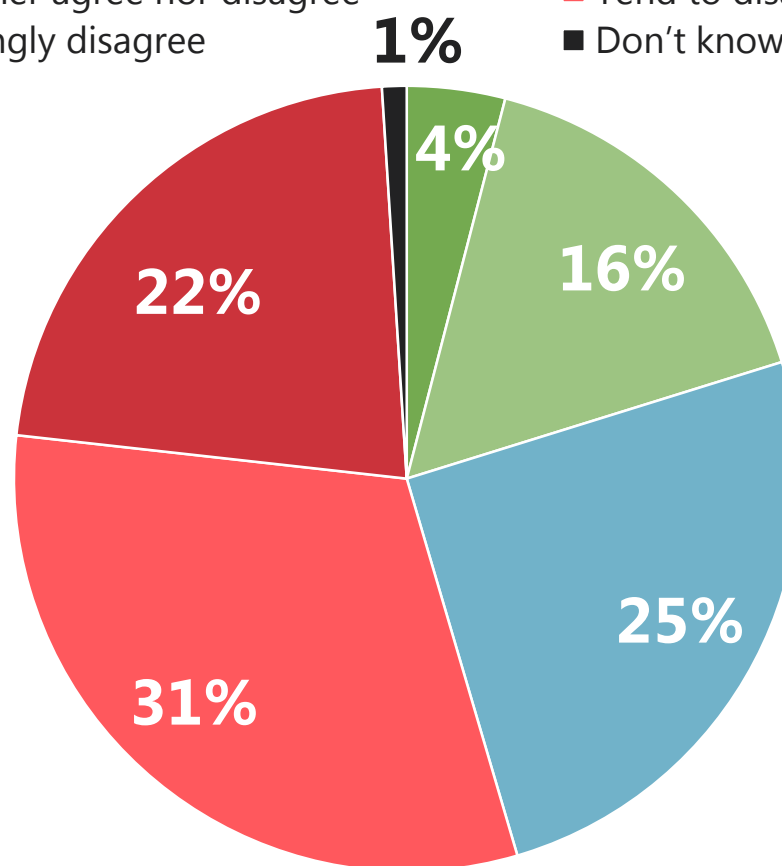
People do not have faith in the current social care system –only one in five (20%) think the Government has the right policies about social care for older people...



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

The Government has the right policies about social care for older people in the UK

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



Base: 1071 GB adults 15+

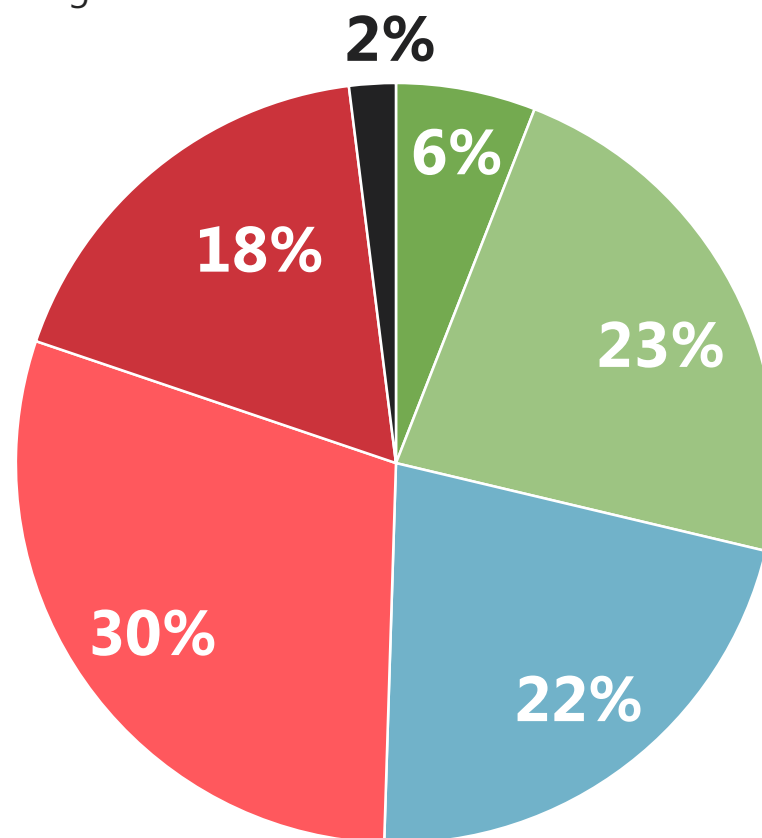
And only three in 10 (29%) think local authorities are providing good social care services for older people



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

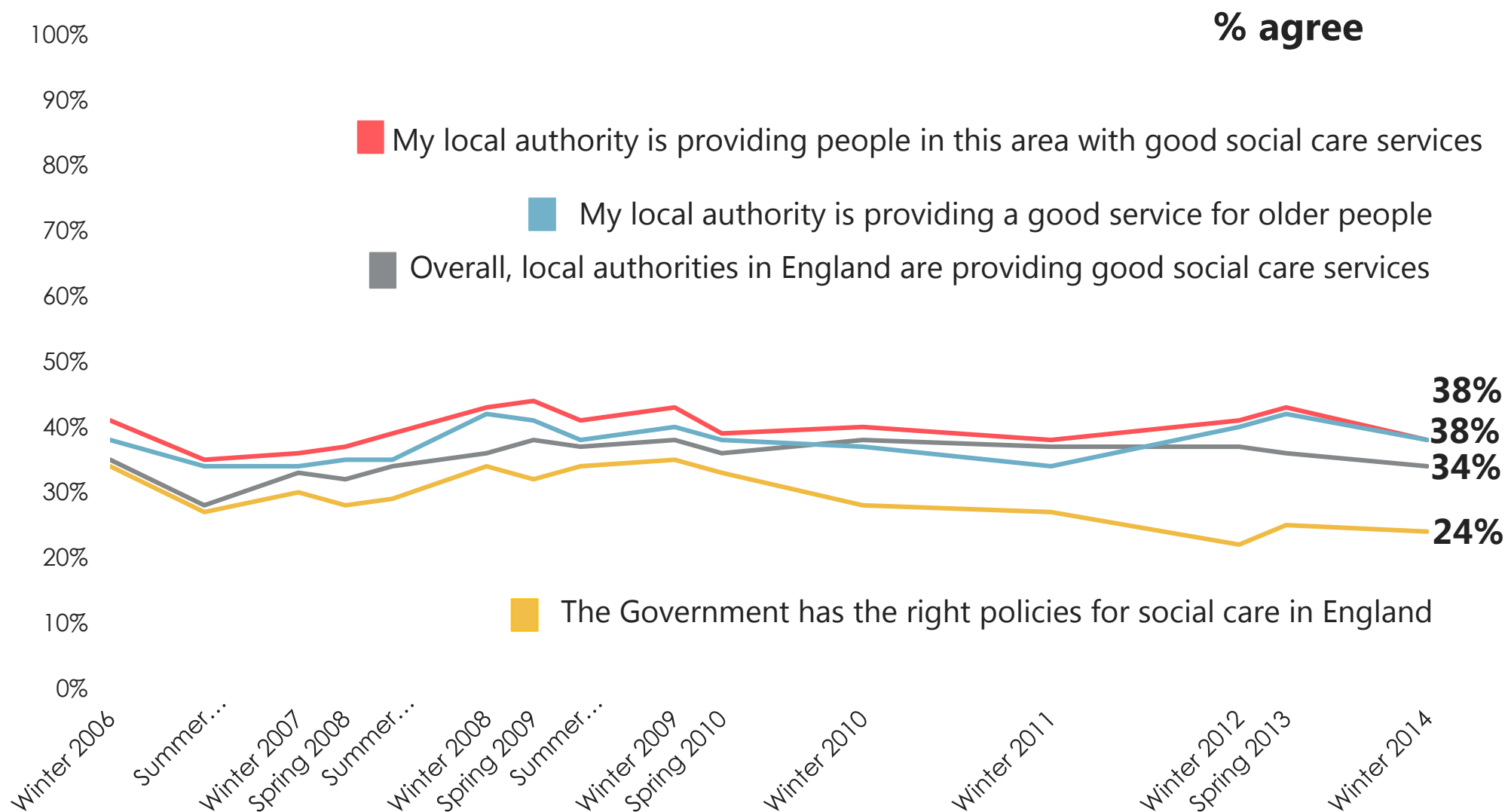
Overall, local authorities in the UK are providing good social care services for older people who need support

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



Base: 1071 GB adults 15+

This is not a new concern - historically, satisfaction with social care services has remained fairly low



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



Ipsos MORI
Social Research Institute

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

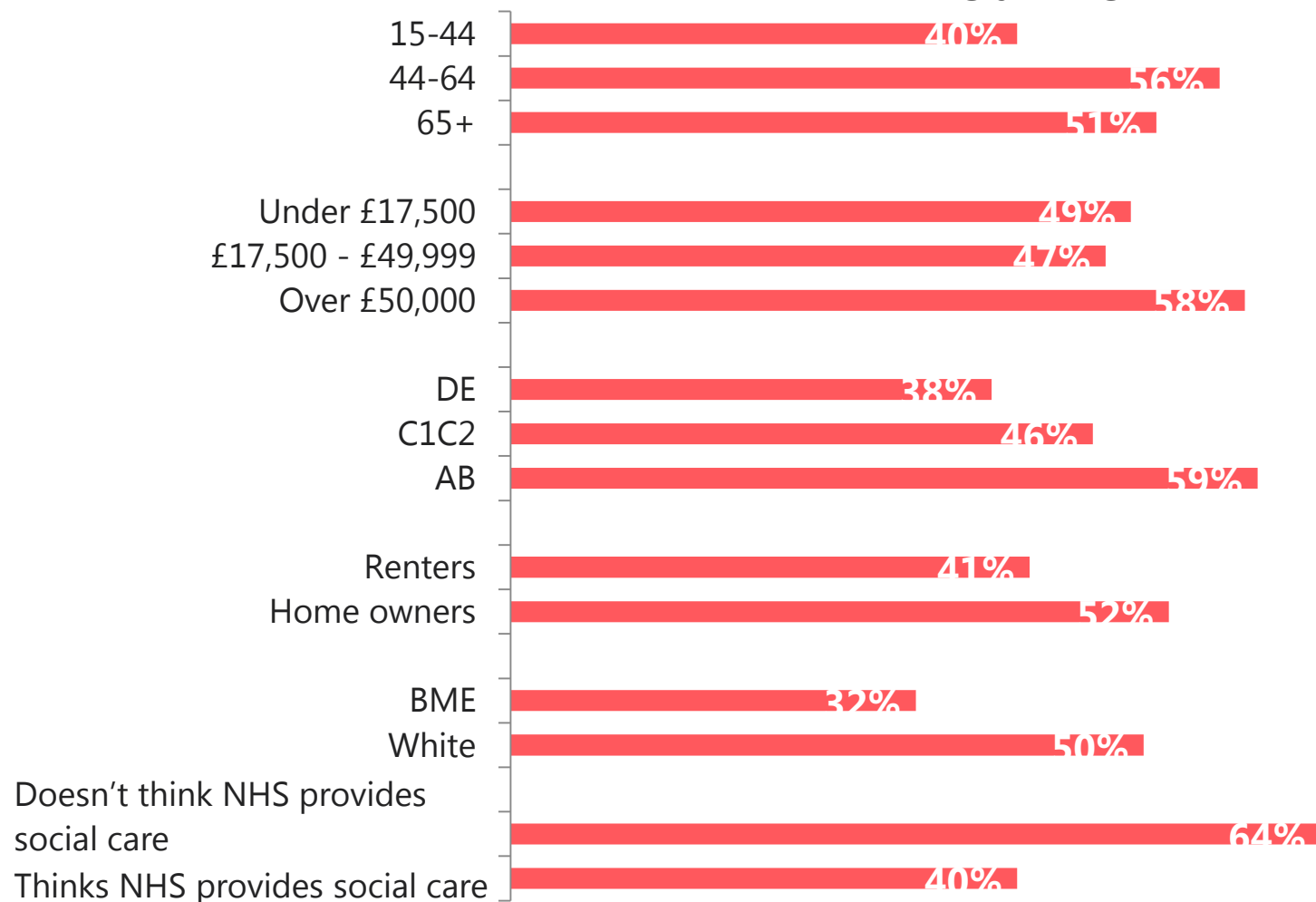
Those approaching retirement, are aware that NHS does not provide the services, higher earners and ABs are the most dissatisfied with the social care services currently offered



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

Overall, local authorities in the UK are providing good social care services for older people who need support

% tend to/strongly disagree



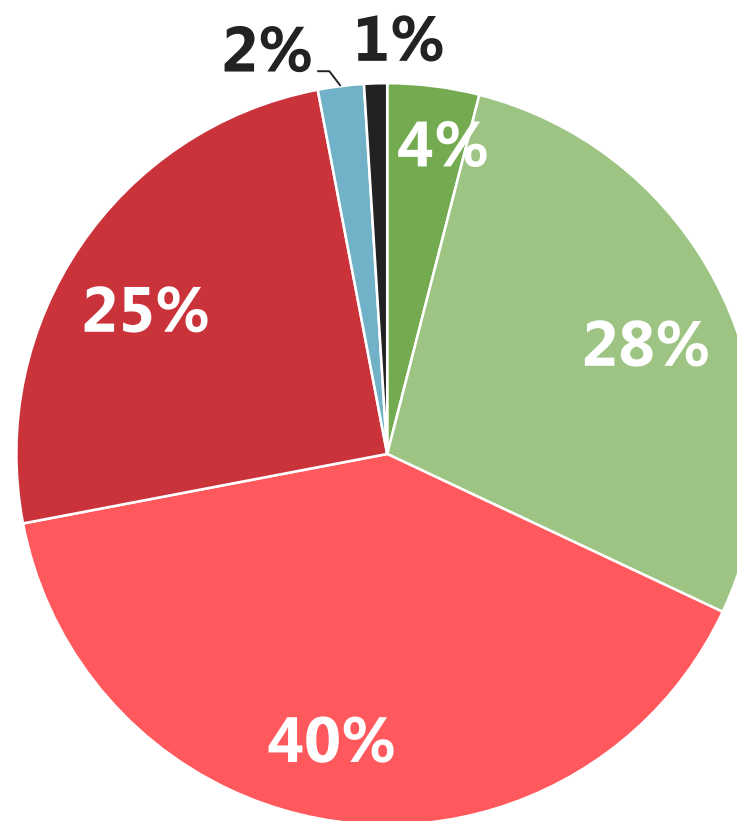
Base: 1071 GB adults 15+

And two thirds (65%) don't feel confident social care services will be available when they need them



How confident or not do you feel that there will be social care services available to support you when you need them?

- Very confident
- Not very confident
- Already using social care services
- Fairly confident
- Not at all confident
- Don't know



Base: 1071 GB adults 15+

Higher earners, ABs and mortgage holders are the least confident social care services will be available for them

Most confident	Least confident
Male	Female
15-24 year olds	Higher earners
DE	AB
Single people	Married/couples
Those who are less informed	Graduates
Those who are not preparing financially	Those with mortgages
	Those who are more informed
	Those who are preparing financially
	Those affected by spending cuts

Lack of awareness and understanding of social care provision– just under half wrongly think social care services are free at the point of need

Q

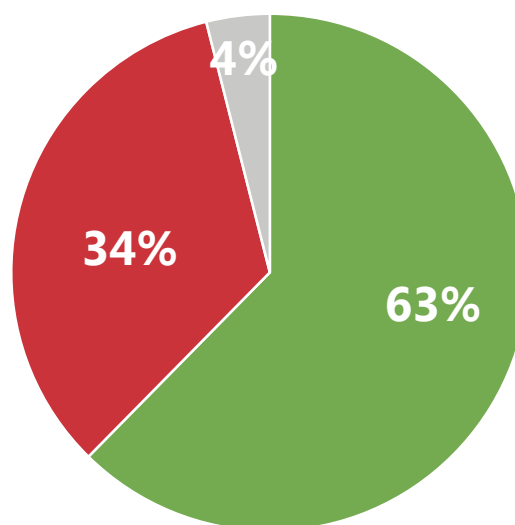
I am now going to read out a couple of statements. For each one, please can you tell me whether you think it is true or false...

* Social care services are defined as the provision of services to support people to be independent, play a full part in society and protect them in vulnerable situations. It includes practical help in the home, day centres, residential and nursing care homes, as well as advice and guidance

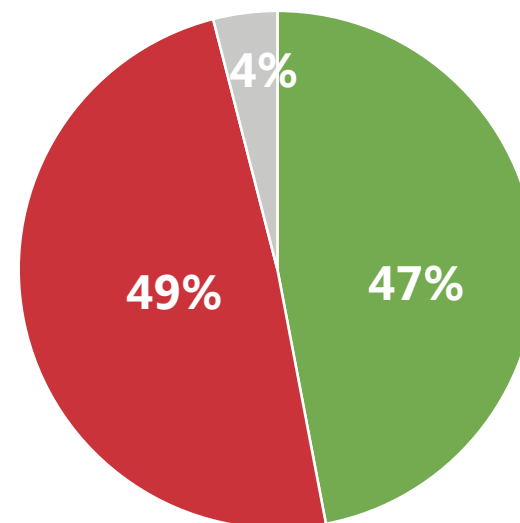
■ True

■ False

■ Don't know



The NHS provides social care services for older people



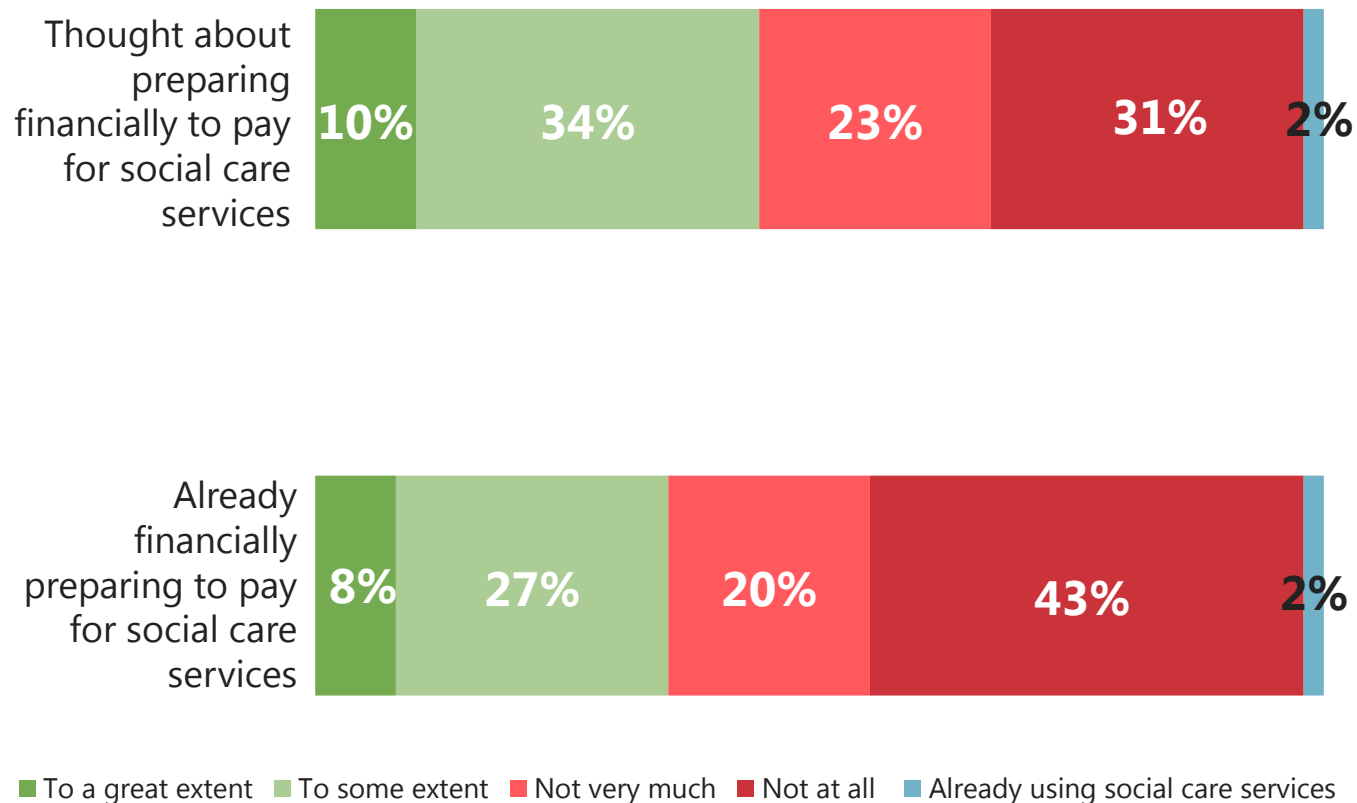
Social care services are free at the point of need

Base: 1071 GB adults 15+,

Lack of awareness reflected in lack of preparation or action. Only 44% of people have thought about preparing financially for their social care and only a third have taken steps to do so

Q

Many people will require social care services when they are older and it is likely that they may have to contribute towards the cost. Before today, to what extent, if at all, had you thought about preparing financially / already preparing financially to pay for social care services you might need when you are older?



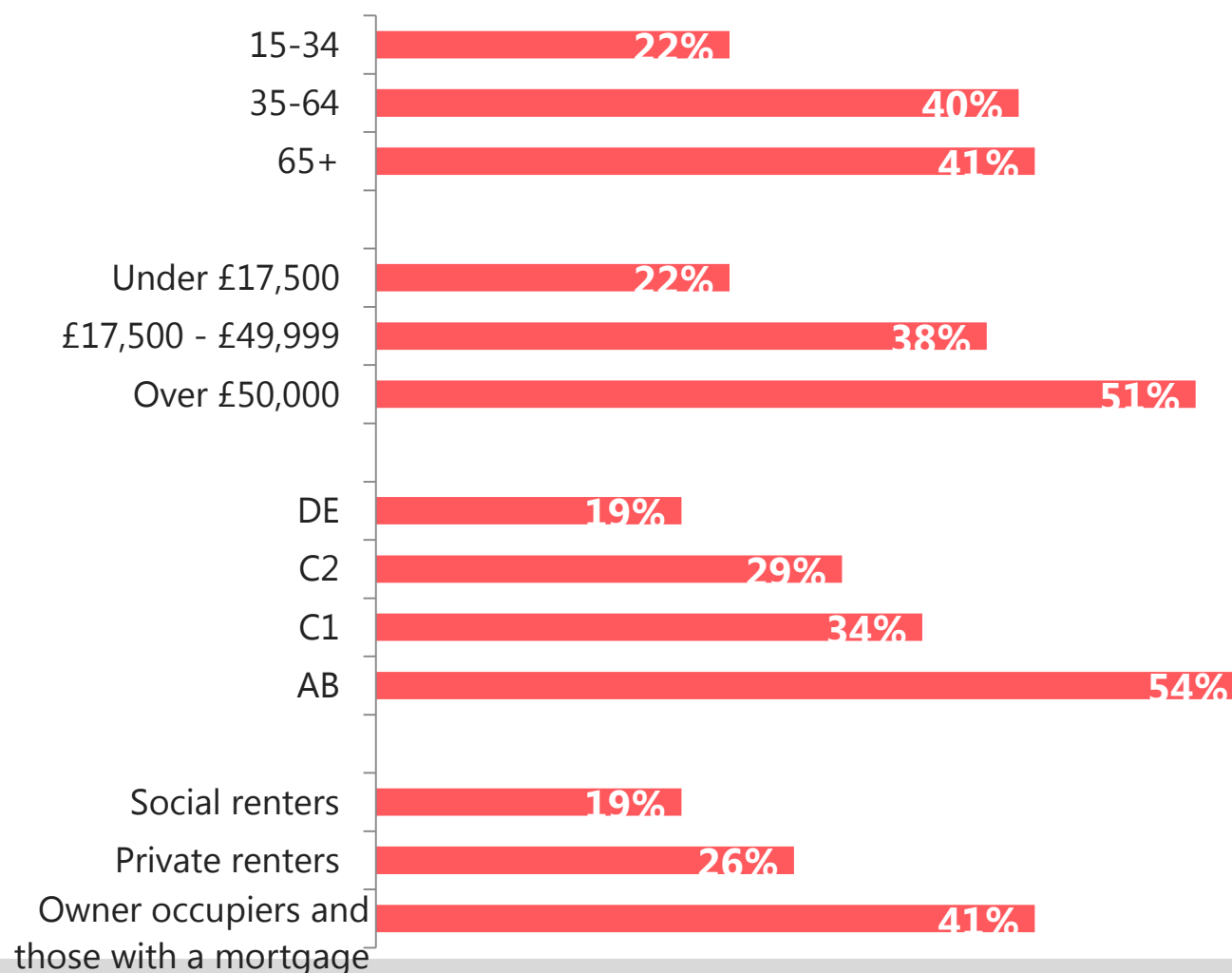
Base: 1071 GB adults 15+

Social renters, the young, those on lower incomes and lower social grades are far less likely to be preparing for future social care needs.



And to what extent are you already preparing financially to pay for the social care services you might need when you are older?

% preparing to some/a great extent



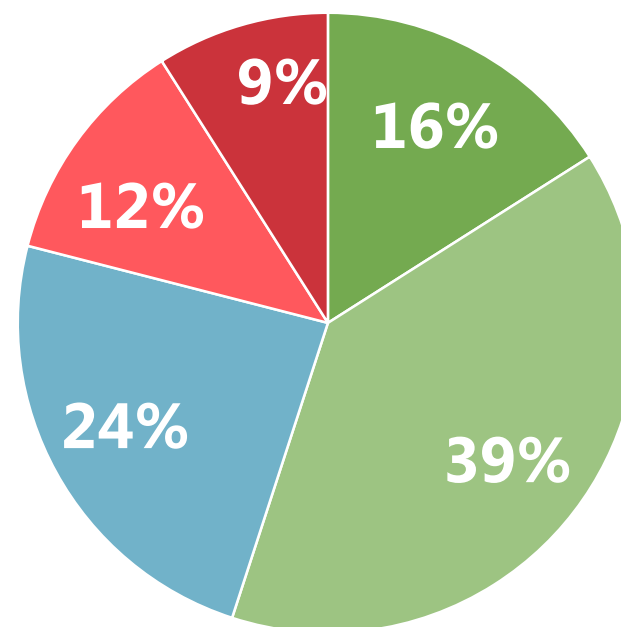
Base: 1071 GB adults 15+

Yet over half (55%) agree it is their own responsibility to save for their social care in the future



And please tell me whether you agree or disagree with the following statement. It is my responsibility to save or make other financial plans so that I can pay towards my care when I am older?

- Strongly agree
- Neither agree nor disagree
- Strongly disagree
- Tend to agree
- Tend to disagree

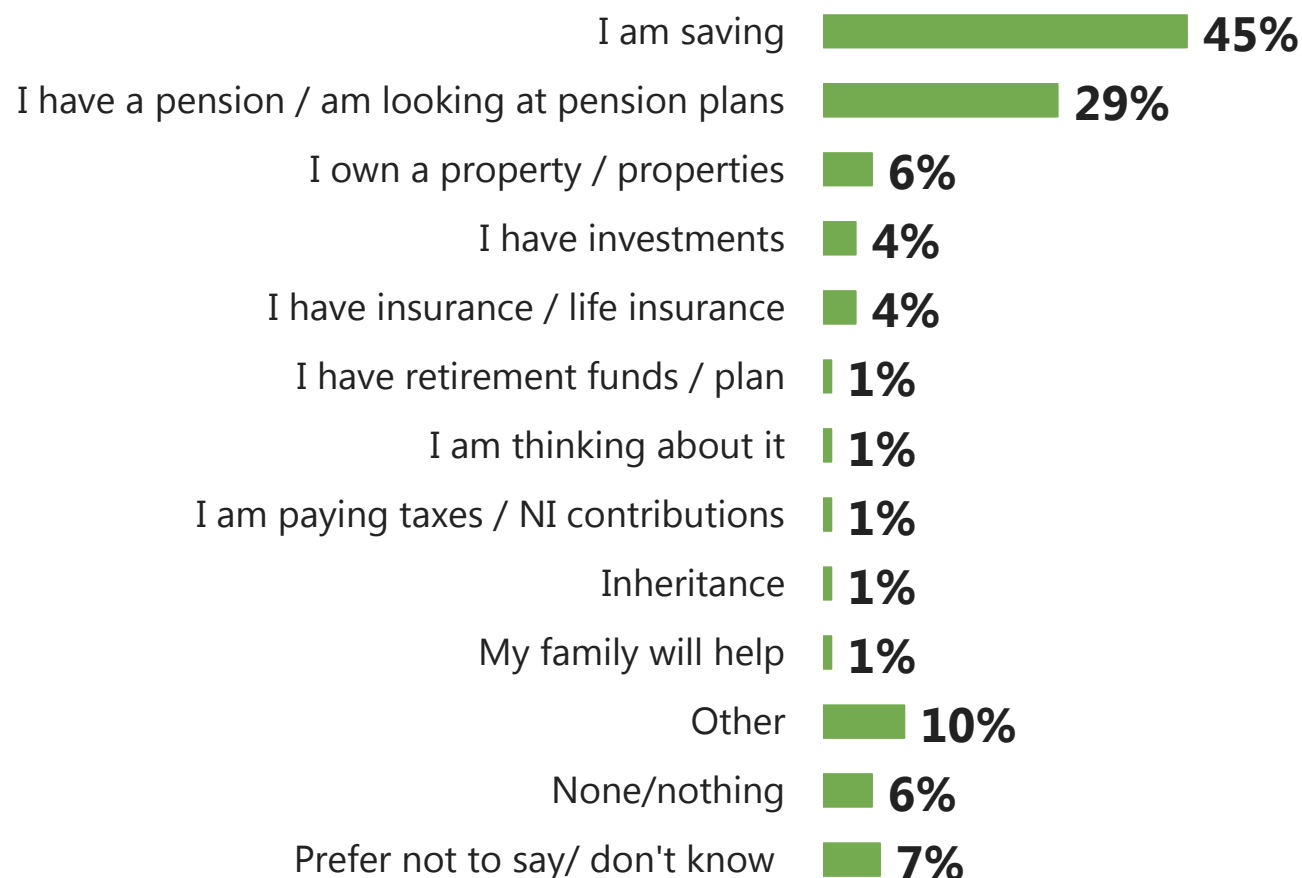


Base: 1071 GB adults 15+

The most common ways to prepare financially for social care is to save or have a pension

Q

You said you are preparing financially to pay for the social care services you might need when you are older. How are you preparing?



Base: 574 UK adults preparing financially for social care services, aged 15+

PERSONAL DATA

- More people say they trust government organisations with their personal data (56%) than they do companies (31%)
- There is an age divide when it comes to trusting government with personal data – with younger people more trusting, but also a social grade and income divide – higher earners and ABC1 are more trusting than lower income and C2DE.
- Key drivers behind trusting organisations with personal data include knowing there are rules and regulations about data use and confidence that data will not be shared with other organisations or used for marketing purposes
- People are more likely to trust government organisations to use data for the good of society and not to use their data for marketing purposes than they do companies

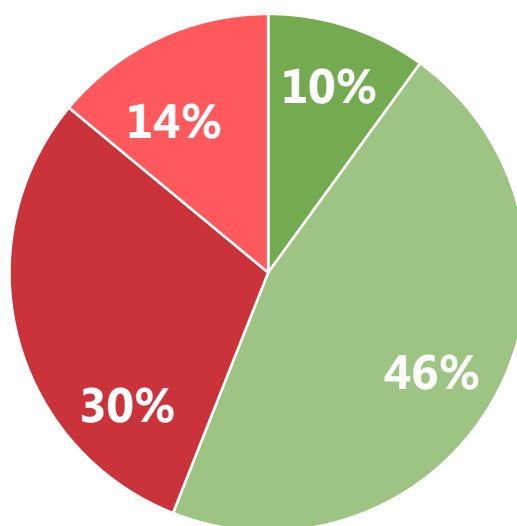


Over half (56%) trust government organisations with their personal data, but less than a third (31%) trust companies

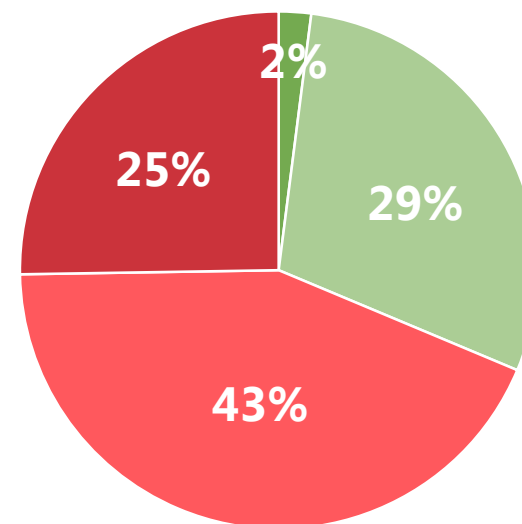


How much, if at all, do you trust government organisations/companies with your personal data?

■ A great deal ■ A fair amount ■ Not very much ■ Not at all



Government organisations



Companies

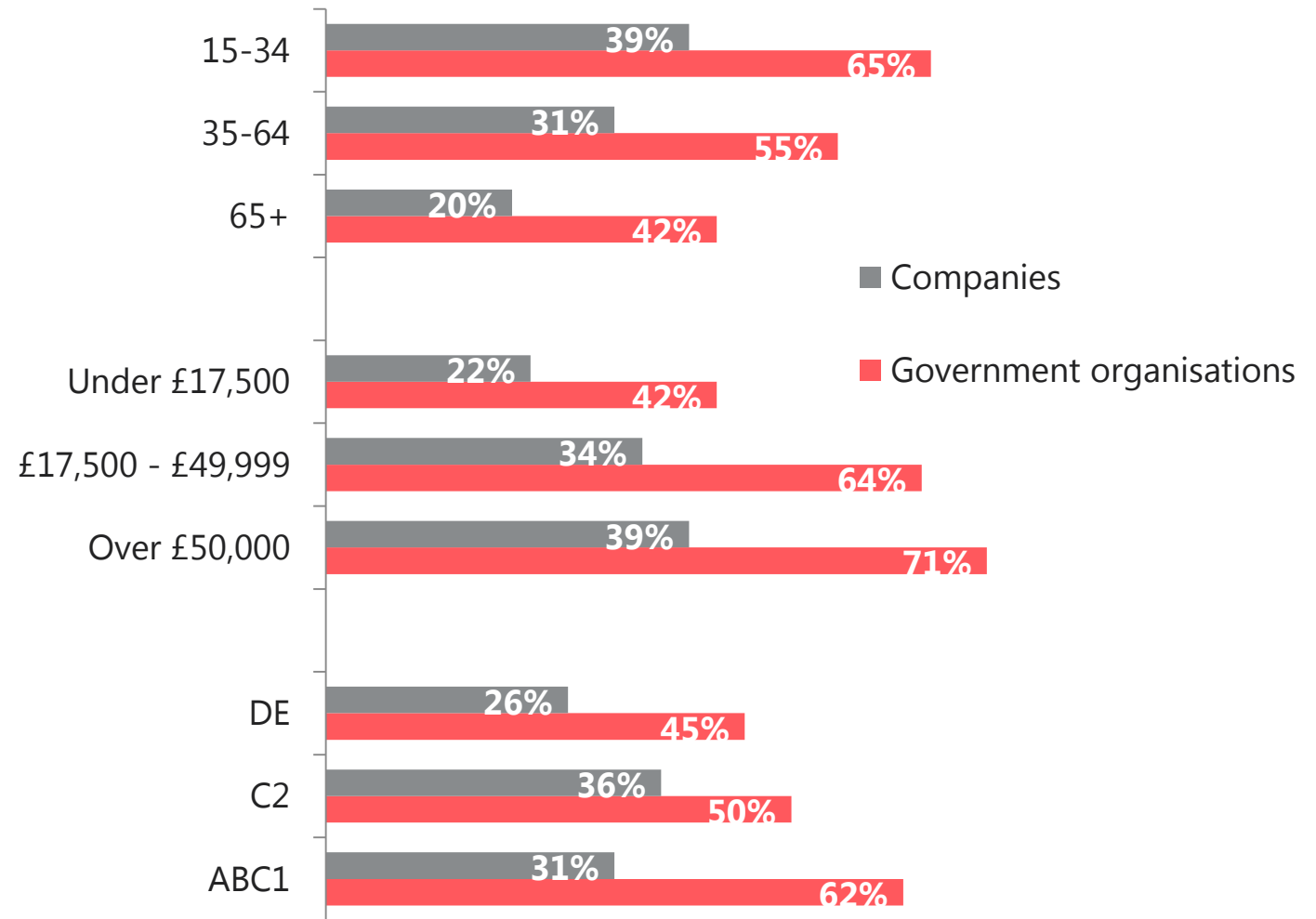
Base: 1071 GB adults 15+,

The young and higher earners are more likely to trust both government and companies with personal data – social grade is more a factor behind trust in government

% trust a fair amount/great deal



How much, if at all, do you trust government organisations / companies with your personal data?

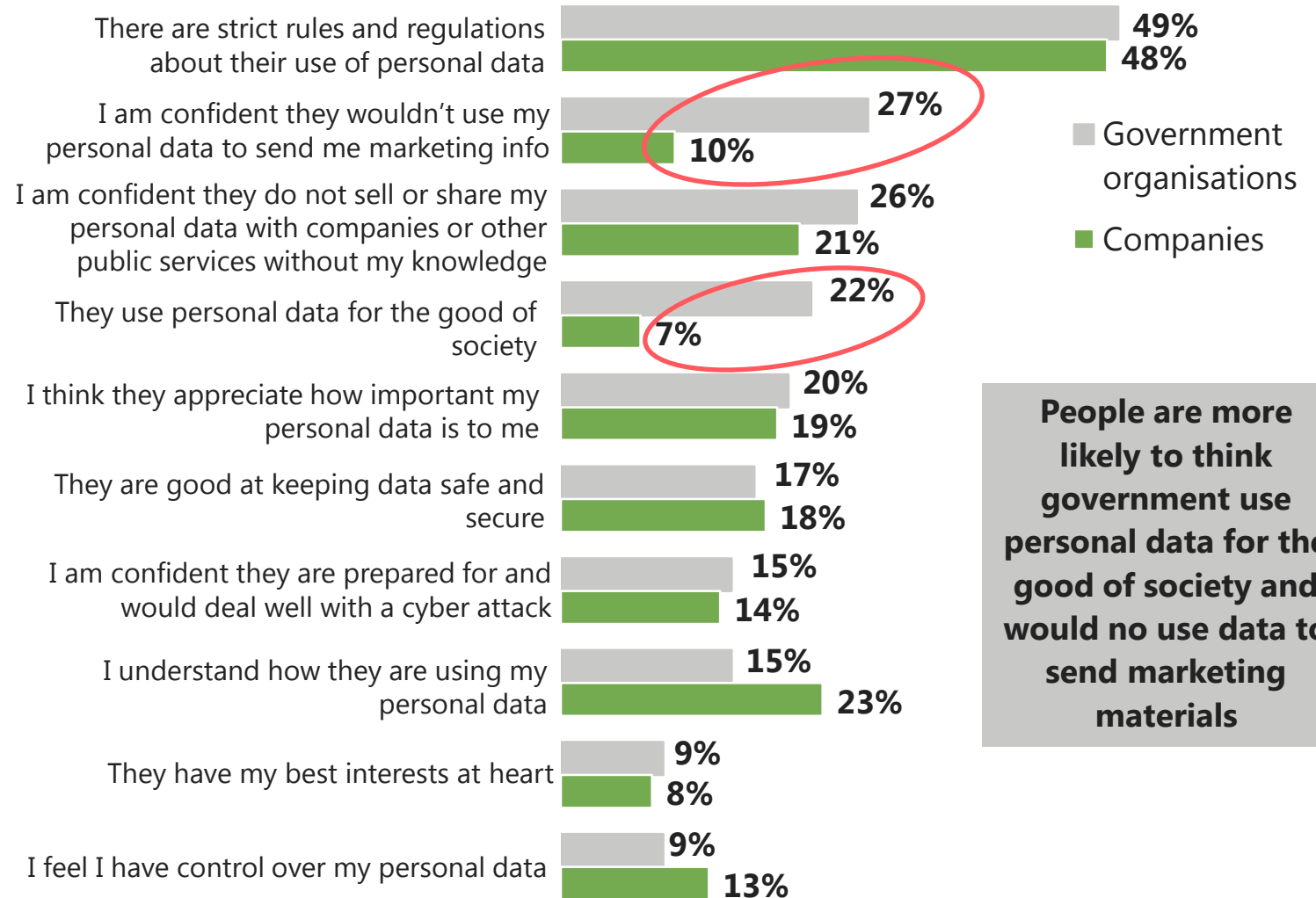


Base: 1071 GB adults 15+

Rules and regulations around data use is a key driver behind trust in companies and government organisations



Which two or three of the following reasons, if any, do you think are most important in explaining why you trust government organisations/ companies with your personal data.



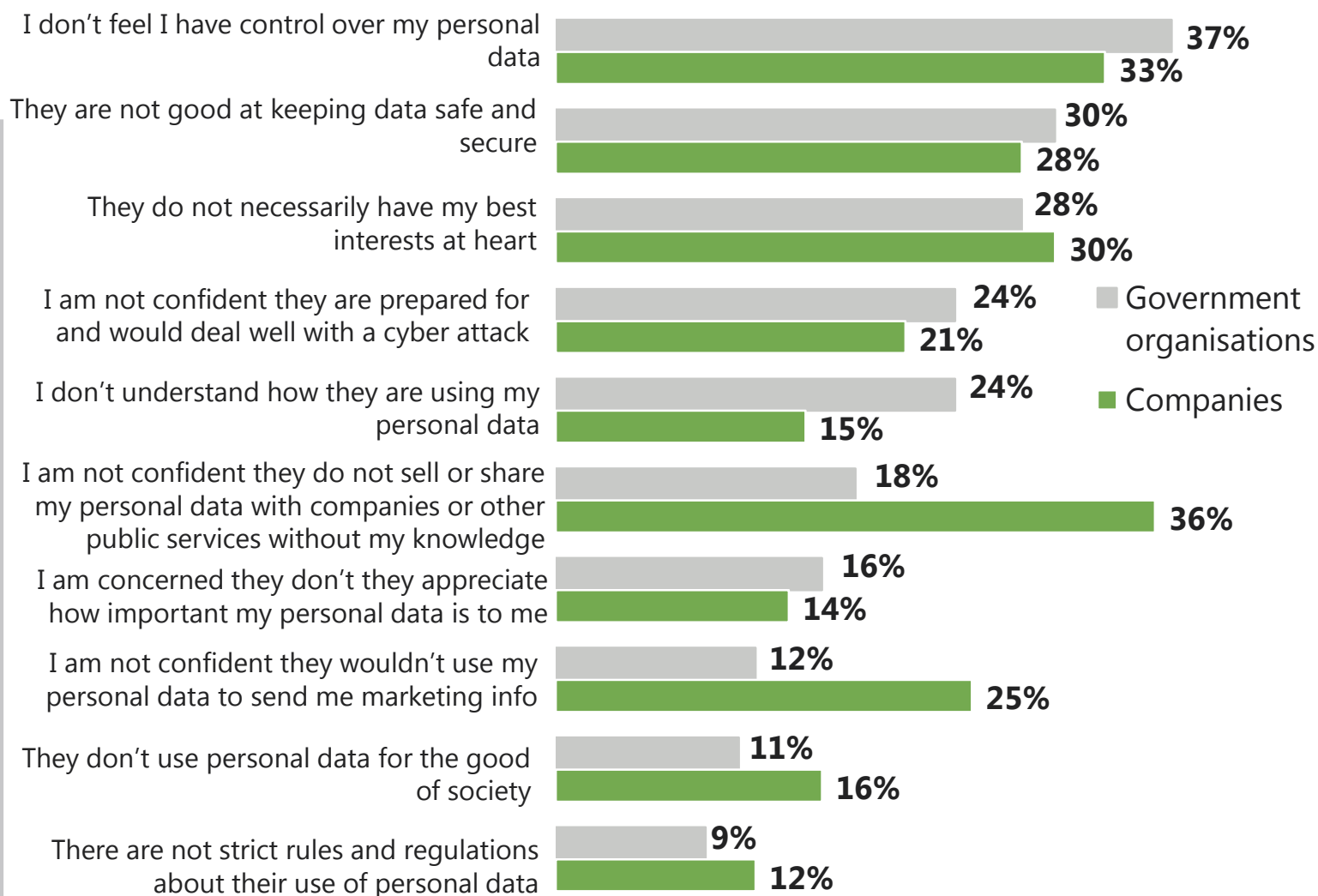
People are more likely to think government use personal data for the good of society and would not use data to send marketing materials

Base: GB adults 15+ who trust government organisations (587) and companies (333) with their personal data

Lack of control over their own data and concerns that organisations can't keep data safe are key drivers of distrust in government – for companies concern over selling data to third parties also key

Q

Which two or three of the following reasons, if any, do you think are most important in explaining why you do not trust government organisations/ companies with your personal data.



Base: GB adults 15+ who don't trust government organisations (479) and companies (736) with their personal data

People are also more comfortable sharing their data online with government departments to access a service (55% comfortable), but only a 23% feel comfortable sharing personal data via social media

Q

How comfortable, if at all, are you with each of the following?

Sharing personal data about myself online through the use of social media platforms (e.g. Twitter, Facebook...)



Sharing personal data online with a company in order to perform a transaction (buy something online, book a trip etc.)



Sharing my personal data with a government department online in order to access a service



Very comfortable

Fairly comfortable

Not very comfortable

Not at all comfortable

Not applicable

Don't know

Base: 1071 GB adults 15+

And people are more confident that their data is used, stored and secured appropriately via a government website than via social media or shopping sites

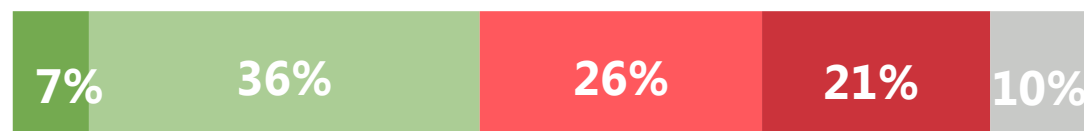
Q

How confident, if at all, are you that your personal data is used, stored and secured appropriately in each of the following circumstances?

When I share personal data online through the use of social media platforms



When I share personal data online to buy goods



When I share personal data with a government department through the use of a government website



Very comfortable

Fairly comfortable

Not very comfortable

Not at all comfortable

Not applicable

Don't know

Base: 1071 GB adults 15+

Strong support for the NHS using personal data to improve their services and treatments – more split on government organisations using data in other ways, but still majority support



To what extent, if at all, do you support or oppose government organisations, such as public services and government departments, using your personal data in the following ways

The NHS using people's personal health data to understand more about people's needs and improve the services and treatments it provides



Government departments using your personal data to inform funding decisions about public services in your local area



Government departments securely sharing people's personal data between them to provide a more efficient service



Government departments having access to your personal data to investigate national security issues



Strongly support

Somewhat support

Neither support nor oppose

Somewhat oppose

Strongly oppose

Don't know

Base: 1071 GB adults 15+

But we've seen in previous research that people tend to be more comfortable when presented with specific scenarios/use of data – but still underlying concerns – though these can be lessened by talking about safeguards



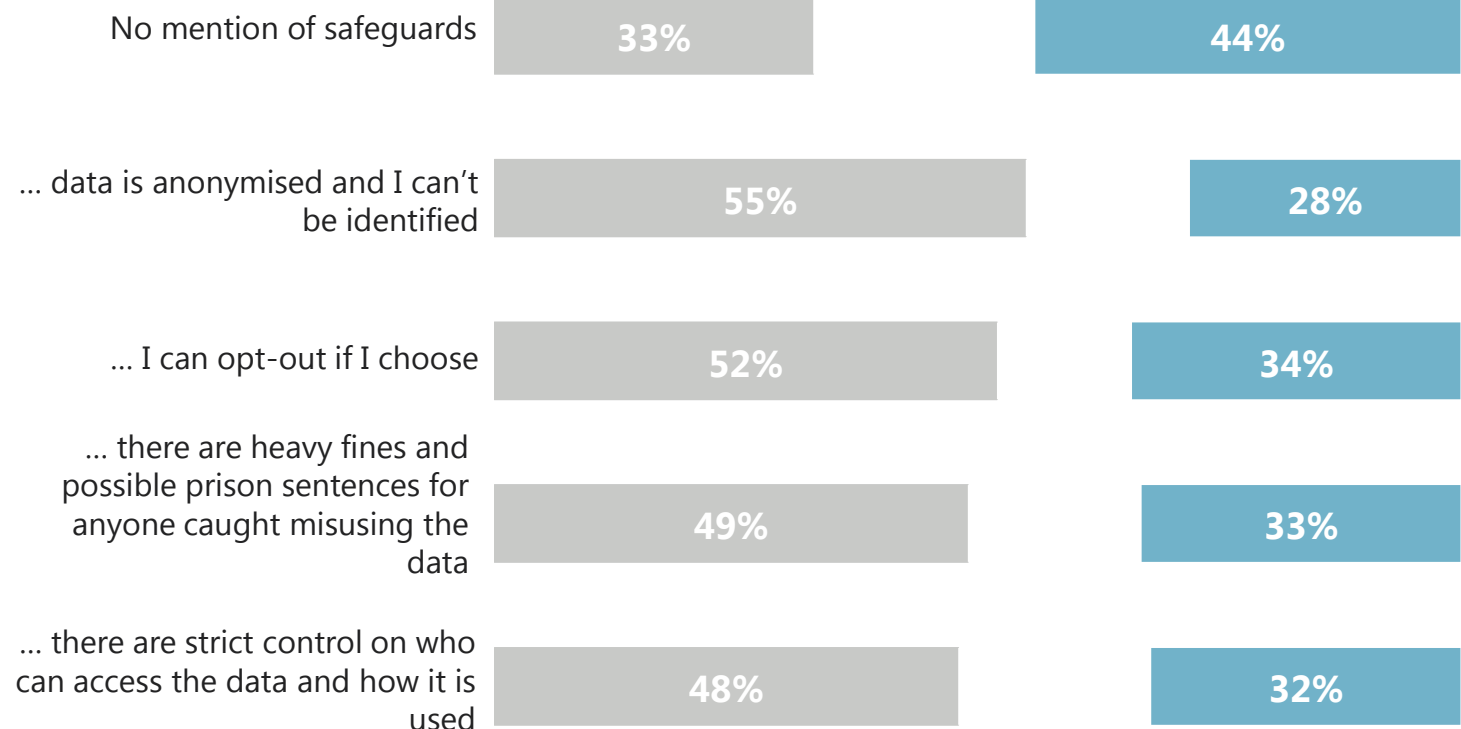
Overall, which of the following statements is closest to your view?

We should share all the data we can because it benefits the services and me, as long as...

We should not share the data as the risks to people's privacy and security outweighs the benefits

We should share all the data we can because it benefits the services and me, as long as...

We should not share the data as the risks to people's privacy and security outweighs the benefits



Base: Four split samples of c.505 GB adults aged 16-75, except 'no mention of safeguards', which had a base of 1,000 GB adults, July 2014

In conclusion...

- There has been a shift in public opinion away from keeping tightening belts and towards spending more on public services – even if that means higher taxes.
- People feel they have been impacted by austerity more than they did in 2015 or 2016 and the number of people who are personally willing to accept less from public services has halved since then.
- However, there is no change in opinion on which areas should be most protected from cuts – NHS and healthcare and education are still top priority for the public.
- People do not have faith in the current social care system and two thirds (65%) lack confidence that social care services will be there when they need them.
- There is also widespread misunderstanding and lack of awareness about who provides social care services and whether it is free at the point of need – particularly from those who are less informed.
- This lack of awareness is reflected in lack of preparation or action – only a third of people have taken steps to financially prepare for their social care needs
- Generally people are more trusting of government organisations with their personal data than they are of companies. The young and those with higher incomes are more likely to trust organisations (both government and companies) with data
- Having regulations around data use is one of the most important drivers of trust in both companies and government organisations. The public tend to think government organisations are more likely to use personal data for the good of society and are more confident their data would not be used for marketing purposes.

Technical note

- Fieldwork was conducted between 18 to 28 August 2017.
- In total, 1071 interviews were conducted using Capibus – Ipsos MORI's face-to-face Omnibus. All questions include all respondents unless stated otherwise (all adults aged 15+ in the United Kingdom).
- The results have been weighted to reflect the known profile of the adult population of the United Kingdom.
- Trend data are from a number of different surveys. As some these surveys were conducted online or via telephone the **trends are indicative only**.
- Where responses do not sum to 100, this is due to computer rounding or multicode questions