IPSOS MORI

UNDERSTANDING SOCIETY

A Great British Recovery?

Contents

Editorial:
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Keiran Pedley
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Foreword

This edition of Ipsos MORI's Understanding Society was always going to make us think. To write about anything other than the COVID-19 pandemic seemed to be ignoring the obvious, but despite its dominance, we know that politicians, policymakers and the public themselves are also having to think about many other issues as well – nearly all affected by the pandemic, but often reflecting long-standing concerns. So, we thought about the enormous and society-wide impact that COVID-19 has had, and we decided that rather than just dissect the present, this edition of Understanding Society should also look at the road ahead towards how the UK can navigate the recovery from the pandemic.

Each wave of the COVID-19 pandemic has caused immediate and obvious impacts. But each has been followed in its wake by aftershocks that reverberate out for society. From the way we travel, work and interact with each other to the way the economy functions and the level of government intervention in every aspect of our lives. From the mundane and everyday to the most fundamental questions about the role of the state. From the micro to the macro. COVID-19 has cut a swathe through the way our society has functioned for generations. During the recovery from the pandemic, some of these changes may 'snap back' or prove to be overhyped, but some will stay with us, and the articles in this edition of Understanding Society will talk through some of these adjustments and discuss if they're here to stay or not.

Often, when there is tremendous societal upheaval, there is opportunity in the recovery. In 1945 the beginning of the NHS and the development of the welfare state was born from six years of war and bloodshed across the globe. And we see it now too, with 44% of Brits believing that the end of the pandemic provides an opportunity to create a friendlier Britain.

That is why we've decided to look at how the recovery will shape Britain. Because it is how we manage the recovery that will shape the character of the UK for decades to come.

The articles in this edition are all written by researchers at Ipsos MORI. All of them are experts in their policy areas and outstanding researchers, and they bring their extensive knowledge, understanding, and insight to bear in each article.

The articles are grouped into three broad areas: society, economy, and sustainability. The first two may be self-evident, but Ipsos MORI's Issues Index has recently shown concern about climate change and the environment at its highest ever level. And with the COP26 conference only recently having closed after being hosted right here in the UK, it seems increasingly clear that like the COVID-19 pandemic this issue will have far-reaching impact across our lives and is one the public is increasingly concerned about.

Ipsos MORI has shared vast amounts of data both through our own research into public perceptions as well as alongside Imperial College London as part of the REACT programme tracking the prevalence of the virus in the population of England. We do this because we believe that sharing these insights leads to better policy outcomes and a better society.

If you would like to discuss any of the issues raised in this report or wish to learn more about what we do, please get in touch with the authors or me.

I hope that this Understanding Society provides insights into the aftershocks Britain must navigate on the road ahead from the pandemic, as we begin to take our first steps in that direction.

Kelly Beaver
Chief Executive
Ipsos MORI
@KellyIpsosMORI

Ready for recovery?

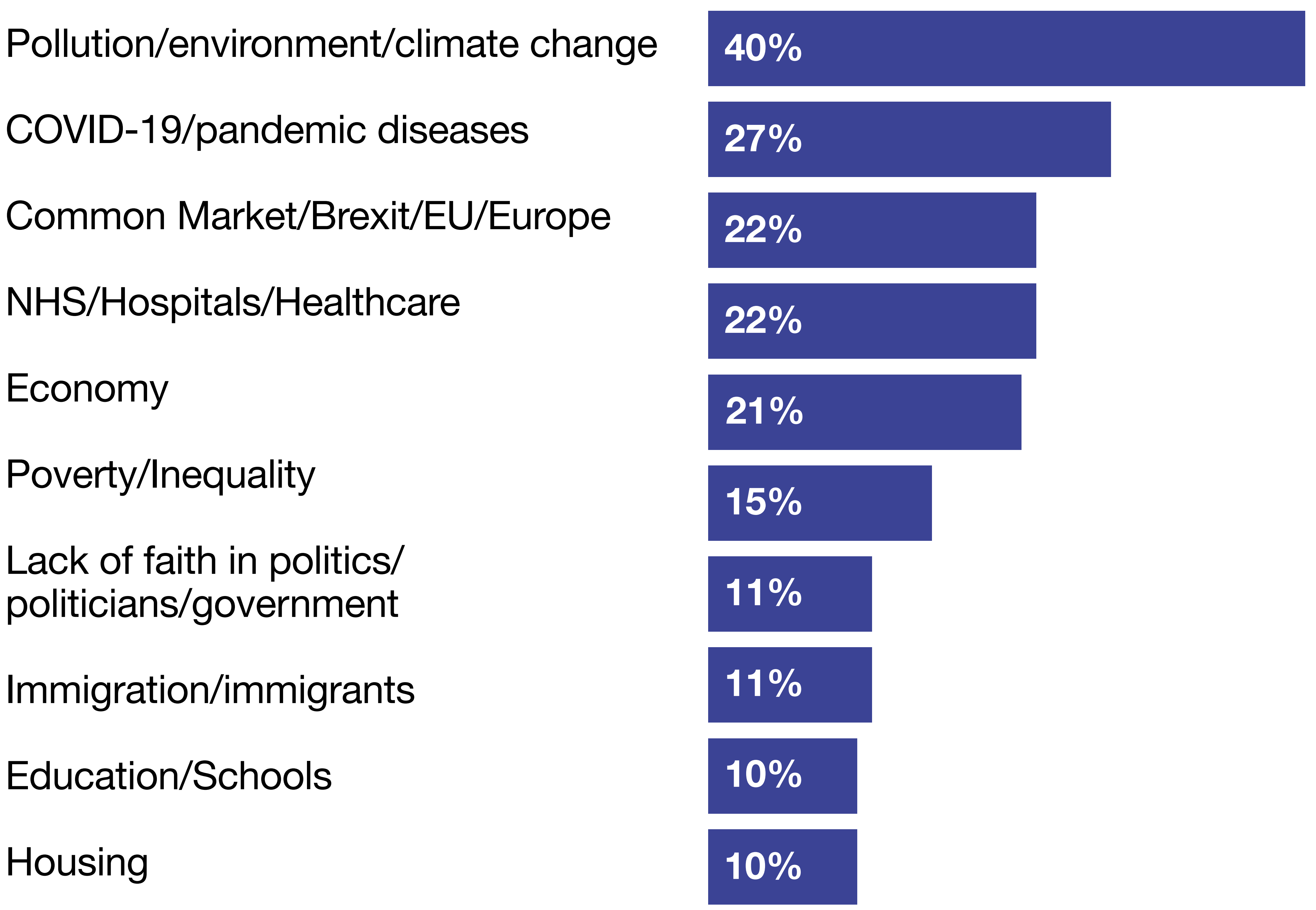
Gideon Skinner
Research Director

2021, like 2020, has been dominated by COVID-19. But it's also the year in which the public and politicians have turned their attention to rebuilding the UK's economy, society and public services. As the Omicron variant has shown, we certainly aren't out of the pandemic yet – the latest REACT study from Ipsos MORI and Imperial College found levels of infections similar to the earlier peak in January this year, even while hospitalisations and deaths are lower. However, the success of the vaccination programme has allowed the public to focus on other issues too, and what improvements they expect the Government to deliver next year.

This is certainly an agenda shared by the Government. The Prime Minister has been clear that the recovery from the COVID-19 pandemic should not see a return to the status quo but that "Build Back Better means we want things to change and improve". More recently, Rishi Sunak, the Chancellor of the Exchequer, introduced his latest Budget as "preparing for a new economy post-COVID-19", focusing on higher wages and investment in skills, productivity, innovation and public services.

Ipsos MORI Issues Index November 2021 – the public worries about more than just COVID-19

Figure 01 – What do you see as the most/other important issues facing Britain today?



Source: Ipsos MORI Issues Index **Base:** 1,009 British adults 18+, 5-11 November 2021

And this focus is evident not just in speeches – the Prime Minister has resurrected the Delivery Unit in No10, while Outcome Delivery Plans introduced in 2021 will be used to set out and monitor how each Government Department is progressing towards its priority objectives. To help achieve levelling up – the “greatest project that any government can embark on” according to Boris Johnson – Michael Gove has been appointed Secretary of State at the newly-named Department for Levelling Up, Housing and Communities. He is supported by Neil O’Brien leading on the White Paper and with former Bank of England Chief Economist Andy Haldane as the new Head of a cross-cutting Levelling Up Taskforce. This all points to a Government making space in its attentions for the country it wants to see emerge from the pandemic.

The public’s focus is expanding too. Between April 2020 and February 2021, the COVID-19 pandemic reached levels in Ipsos MORI’s Issue Index comparable to other era-defining concerns: inflation in the 1970s, unemployment in the 1980s, the NHS (and briefly terrorism) at the turn of the century, the economy after the 2008 financial crash, Brexit in 2019. But concern fell in the spring, and in our most recent waves COVID-19 no longer stood out all its own, but shared top billing with concerns about the economy, the knock-on effects of Brexit, the NHS, and most especially climate change.[01]

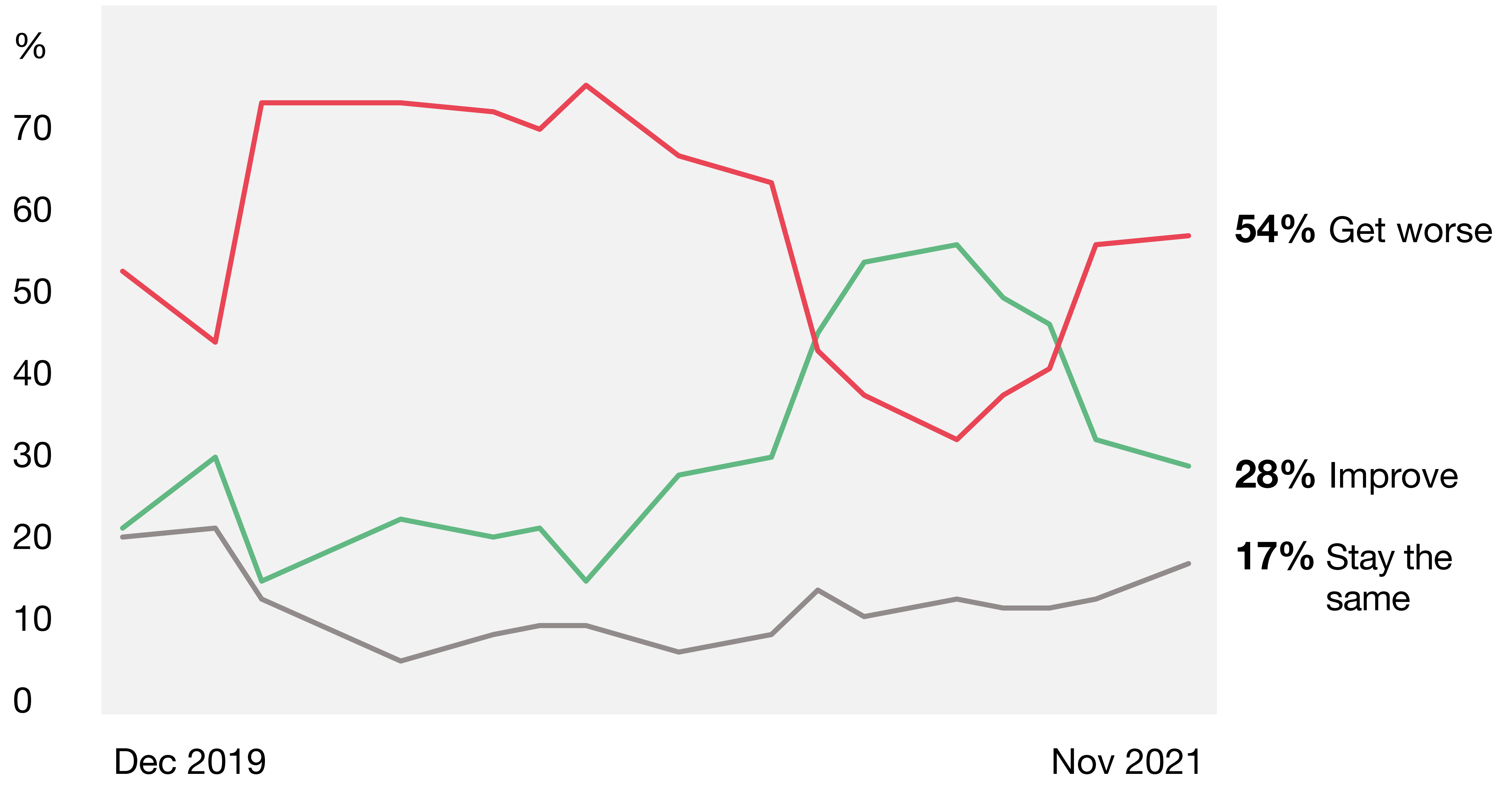
It's important to note that this doesn't mean the public are now blasé about the pandemic. On the contrary, even before Omicron fears remained that there may be another wave (especially if a new vaccine-resistant variant emerges), among parents for their children, and for the possibility of a new lockdown.[02] Throughout the pandemic we have seen public opinion move swiftly in reaction to changes in the virus and official responses, and if cases continue to increase it would not be surprising for the public mood to shift again.

But there is no doubt that the public is thinking about issues other than COVID-19. Unfortunately for the Government, while the vaccination programme may have created that space to focus on other matters, the boost in optimism that its success engendered has proven to be less long-lasting. In March and April, half (49%) of Britons thought the country was heading in the right direction in Ipsos' What Worries the World tracker, one of the highest scores since the series began in 2013. But by October that had dropped to just 35%, while the proportion feeling Britain was on the wrong track rose from 51% to 65%.

There has been a similar up and down in attitudes towards the economy. In June Ipsos MORI's Economic Optimism Index showed optimists outnumbering pessimists by 53% to 31%, the best score for over five years, but by November that had reversed to 28% hopeful to 54%

Changing economic optimism December 2019 – November 2021

Figure 02 – Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Source: Ipsos MORI Political Monitor **Base:** 1,007 British adults 18+, 29 October – 4 November 2021

> **The public feels the next period of growth may be more precarious than before**

predicting a turn for the worse. This is despite the recent ONS estimates that economic growth in Q2 was stronger than expected, suggesting the public may be expressing more worries about shortages, energy bills, and the cost of living, and feeling the next period of growth may be more precarious than before. In fact, this is borne out by the Resolution Foundation's analysis of OBR projections,[03] expecting average real household disposable incomes to fall 1.7 per cent in the second half of 2021, while looking a bit further ahead to 2022-23 the Institute for Fiscal Studies forecast real household disposable income growth to fall by 0.1% in the context of rising cost of living.[04] Overall, the Government had actually been getting improving ratings in 2021 for its management of the economy and record on unemployment (probably reflecting the "great success" of the furlough scheme).[05] But the reaction to the October Budget was not as positive as the previous pandemic budgets, and the future outlook is much more uncertain.

Given that, perhaps it's no surprise that job opportunities stand out as one of the main concerns people have for their local areas, with only one in four satisfied with job opportunities in their local area in our State of the State 2020/21 survey for Deloitte[06] (and especially low in regions such as the North East and North West, South West, and the devolved nations Scotland, Wales, and Northern Ireland). Of course it's about the quality of the jobs as well as the quantity, with the public also emphasising the importance of training, education, and investment for new industries (particularly green industries, which almost half feel will create new jobs and boost the economy). Again this matches the Chancellor's emphasis on skills, investment and productivity – and one of the potential silver linings of the pandemic has been the expectation that innovation among UK business will get better (by 41% to 24% thinking it will get worse). With four in ten reporting they are spending more time online and using technology more to get in touch with public services,[07] this could be a driver of innovation in the future.

However, while there are hopes that Britain could emerge a better place after the pandemic – 66% of the public agree the crisis "gives us the chance to change how we've done things and build a better UK in the future",[08] 44% believe it provides an opportunity to create a friendlier Britain[09] – people are more sceptical that it really will. This is particularly the case for public services – two in three think the UK government has done a bad job on improving the NHS, and over half criticise how it has dealt with crime, racial cohesion, improving the education system, and reducing regional inequalities.[10] And there are persistent concerns about the long-term impact of the pandemic on young people – 52% believe it will be a significant negative one.[11]

There has been much talk of how this Government sticks to a positive, feel-good message for Britain's future – from "Boris boosterism" (the Prime Minister beats his Labour opponent by a factor of two when it comes to giving people confidence for Britain's future)[12] to the Chancellor's announcement of "an economy fit for a new age of optimism" in the Autumn Budget.[13] This served them well for much of 2021, with strong public approval for the vaccination programme and generally satisfactory ratings for their handling of the pandemic overall. Indeed, it's worth putting this into historical perspective – in all of Ipsos MORI's records going back to 1977 only Tony Blair's Government in its honeymoon period in 1999 has got better satisfaction

Public ratings of government performance – successes and concerns

Figure 03 – Since Boris Johnson's Government was re-elected in December 2019, do you think the Government has done a good or bad job at…?

	Good	Bad
Ensuring the public are vaccinated ASAP	87%	9%
Managing the economy	49%	40%
Keeping unemployment down	48%	36%
Maximising Britain's influence in the world	38%	45%
Handling Britain's exit from the EU	35%	57%
Handling taxation and public expenditure	33%	50%
Handling race relations	27%	56%
Improving the NHS	26%	65%
Dealing with crime	26%	58%
Handling Scottish and Welsh devolution	25%	44%
Improving the education system	23%	57%
Reducing inequalities between different regions (also known as "levelling up")	22%	55%

Source: Ipsos MORI Political Monitor **Base:** 1,113 British adults 18+, 30 July – 9 August 2021.

ratings two years in than Boris Johnson's in 2021.

But the task is not going to get easier. As the latest REACT study showed, there is a "nationwide increase in infection prevalence",[14] so the virus has very much not been defeated, although it also shows again the effectiveness of the vaccines and the potential impact of boosters. Yet while the public still worry about the chances of another wave and more lockdowns, they are also beginning to look ahead too – and with some trepidation – to the prospects for Britain's public services, the economy, geographic inequalities, the climate, and for future generations. And this is borne out in the latest Ipsos MORI polling showing the Conservatives continuing their downward trend since the summer and losing their lead over Labour (not helped by stories of sleaze), while ratings of the Prime Minister and the government also suffer. The Prime Minister promised a "can-do government" that "will get on with our job"[15] – the public will now be waiting for him to get on and do it.

"While there are hopes that Britain could emerge a better place after the pandemic ... people are more sceptical that it really will"

Pinning down levelling up

Holly Day
Senior Research Executive

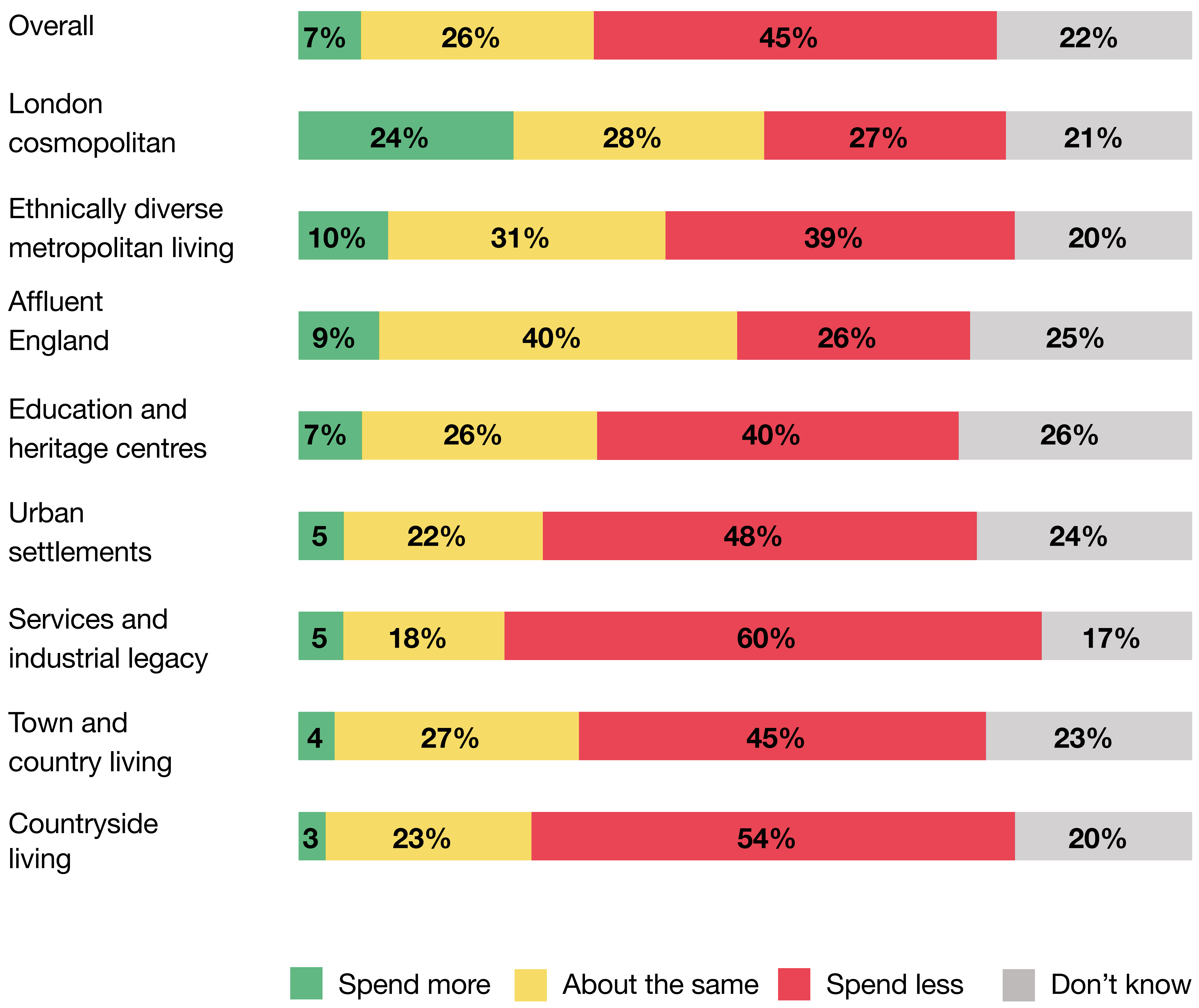
In 2019, Boris Johnson campaigned on a platform to '*Get Brexit Done*'. After a comprehensive win for the Conservative Party, taking swathes of seats they'd never previously held and dominating across parts of the North of England, the Prime Minister and his Government knew they would now need a vision that would speak to *all* parts of the country.

"…it is time we unleashed the productive power not just of London and the South East but of every corner of England, Scotland, Wales and Northern Ireland"
– Boris Johnson, July 2019

With the UK having left the EU (even if that isn't the end of the process), the Government turned its focus towards a plan to address existing place-based inequalities. The Conservative Party's 2019 manifesto promised "an agenda for levelling up every part of the UK" with the Prime Minister making the flagship policy the 'central purpose of his premiership'. To consolidate in seats such as Leigh in Greater Manchester (Labour held for almost a century), Workington in the North-West and Blyth Valley in Northumberland,

Service/industrial legacy regions and rural areas feel most left behind when it comes to government spending

Figure 04 – In your opinion, does the national Government in Westminster spend more, spend less or about the same on your area, as it does on other local areas?



Source: Ipsos MORI KnowledgePanel
Base: All participants in England (8352); Affluent England (877); Education and Heritage Centres (1266); Countryside Living (1455); Ethnically Diverse Metropolitan Living (657); London Cosmopolitan (354); Services and Industrial Legacy (1266) Town and Country Living (1382); Urban Settlements (1096). Fieldwork dates: 18-24 March 2021

the Conservatives need to address the inequalities that matter to local areas within these regions.

This will be a challenging task, albeit one that chimes with public concerns. Britons give a higher priority to area-based inequalities than the European average (by 51% to 39%),[16] and even back in 2015 82% agreed that the British economy needs to be rebalanced so that is not so dominated by London and the South East. A clear majority of people in England (67%) think that the Government doesn't care about their local area very much, rising to 77% in the North East and 76% in the North West.

Similarly, 45% believe the Westminster Government spends

Delivering all the ambitions for levelling up will require collaborating towards common goals

less on their area than other places, again higher in the North East (71%), North West (59%), and Yorkshire and Humber (56%), and also the South West (51%). But we can add to this picture by looking at *types* of area, not just broad regions. Using area classifications developed by the ONS and applying them to our data, we can see that perceptions of being left behind in Government spending are particularly high in two of them: 'Services and Industrial Legacy' (60%) – predominantly in the Central Belt in Scotland, northern England and south Wales – all traditional mining areas; and 'Countryside Living' (54%) – characterised by rural areas with a low population density and an older age profile. In contrast, in the 'London Cosmopolitan' areas almost as many think they get more spending than other areas as less.

So what are the challenges facing the Government as they try to deliver on this agenda? A first is simply dealing with low public awareness of the policy, despite the strong desire to do something about regional inequalities. In March of this year, half (50%) of those in England either knew nothing about the concept of levelling up or had never heard of it. Although this decreased slightly in July, awareness is still low with only 16% saying they know a great deal or fair amount about it, even two years since the vision was set out.[17] This demonstrates that a gap in understanding remains, which the Conservatives will be hoping to change in the run up to the next election – and as shown in the focus they have placed on this agenda in 2021, giving it priority in party conference and Budget speeches, in the new Department for Levelling Up, Housing and Communities, and the creation of a cross-cutting levelling up Taskforce.

Of course, the challenge isn't faced by central Government alone. Delivering all the ambitions for levelling up will require collaborating towards common goals and achieving locally-driven progress alongside the elected Metro Mayors and local and regional authorities who represent all corners of the country.

This is against the backdrop of the pandemic which has increased the visibility of several Mayors, such as

Andy Burnham, Mayor of Greater Manchester, to campaign for a better recovery deal for *his* local area, with others in places such as Liverpool and Sheffield following suit. At the same time Ben Houchen's success as the Conservative Mayor for Tees Valley saw him re-elected with a landslide 72.8% of the vote in the 2021 local elections. Three in five (60%) across England say Mayors have had a positive impact on 'looking out for their cities or regions best interests' during the pandemic, rising to 72% in the North West.[18]

Furthermore, a strong majority of the public (81%) think it's important for the Government to work with these now emboldened Mayors when it comes to delivering the levelling up agenda.

However, it is yet to be seen if the Mayors could potentially challenge the direction and targeted areas that the Government wants to focus on when it comes to levelling up.

"…this country is not only one of the most imbalanced in the developed world, it is also one of the most centralised – and those two defects are obviously connected".
– Boris Johnson, July 2021

The biggest challenge overall though for the Government could be how it defines levelling-up in a way that will enable it to focus on delivering real improvements that address particular local concerns – while of course at the same time hoping that those improvements will be recognised and

Local priorities for levelling-up

Figure 05 – And which of the following, if any, do you think should be among the Government`s main priorities for levelling up for your local area?

Top 10 mentions

35%	Increasing Government support for work placements, apprenticeships and training opportunities for 16-24 year-olds
33%	Increase funding to primary and secondary schools
29%	Increasing investment in green industries, green technology and finance
29%	Increasing government support for adult skills and training opportunities, including investment in post-16 further education and free courses for those without A level or equivalent qualifications
27%	Build more hospitals and recruit more nurses
27%	Recruit more police officers
26%	Invest in high-value local infrastructure
26%	Invest in research and innovation projects that aim to drive economic growth in my local area
21%	Invest in bus and cycle routes
21%	Roll out fibre technology to improve internet access

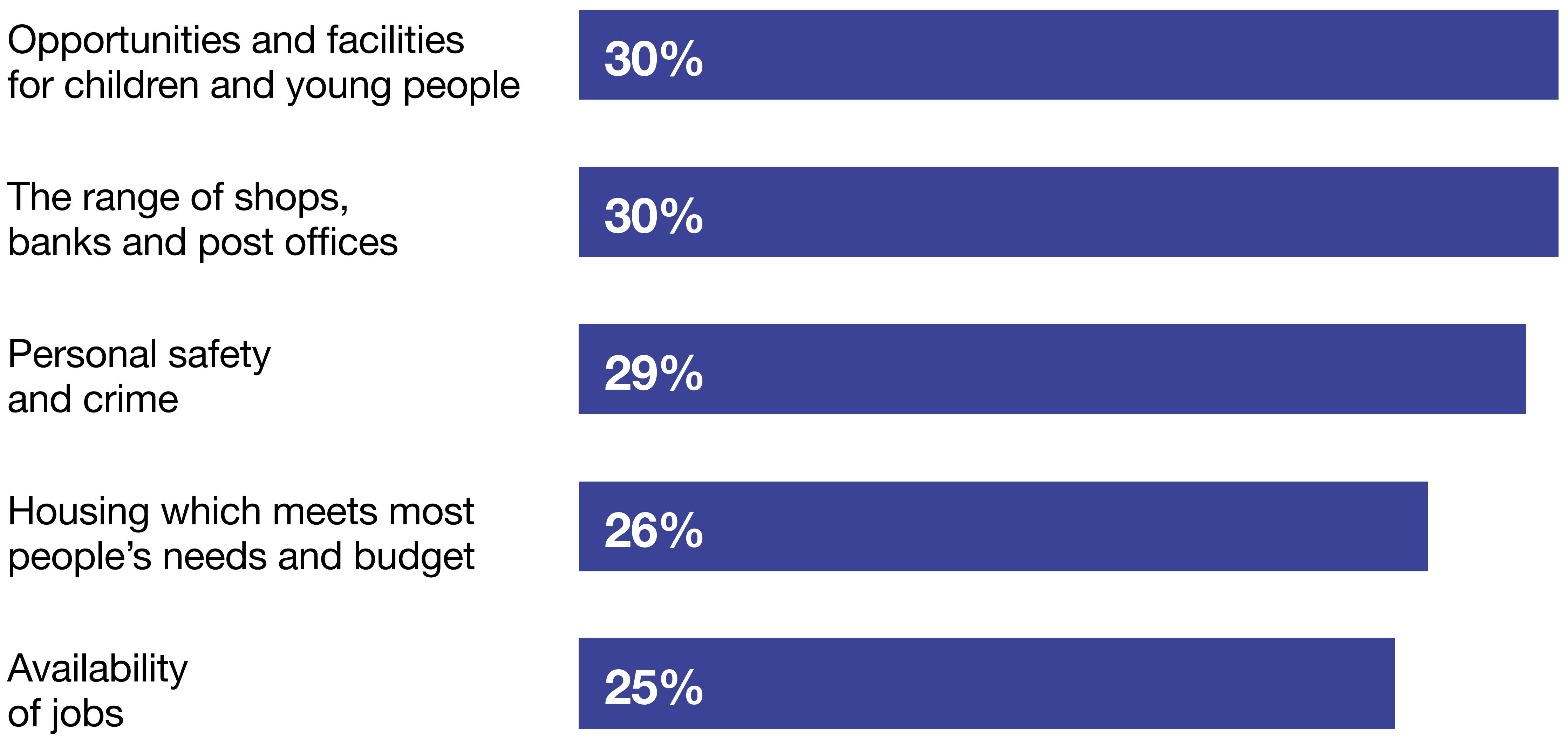
Source: Ipsos MORI KnowledgePanel **Base:** All participants in England (9877). Fieldwork dates: 22-28 July 2021 appreciated by the public. This will be a key task for the upcoming White Paper, but we have already seen how Michael Gove, Secretary of State for Levelling up, has set out a four-part framework of what levelling up means to him:

"Levelling up means four things. We want to strengthen local leadership to drive real change. We will raise living standards especially where they are lower. We will improve public services especially where they are weaker. And we will give people the resources necessary to enhance the pride they feel in the place they live."[19]

But what does the public say? As part of our ongoing series of digital diaries on levelling up,[20] we have asked people what levelling up means to them in their own words. What comes through is a wide range of different issues, many of which though do overlap with what the Government itself has said. Levelling up will be seen as a success by our diarists if it can address specific issues affecting those areas that see themselves as somewhat left-behind – the north/south imbalance, brain drains to bigger cities, particular problems facing rural and coastal areas (such as public transport and broadband infrastructure), rail links to the rest of the country, and so on. But there are also a whole host of other concerns mentioned by participants from across the country – access to green space, thriving high streets, support

A conducive environment for young people to thrive is a priority

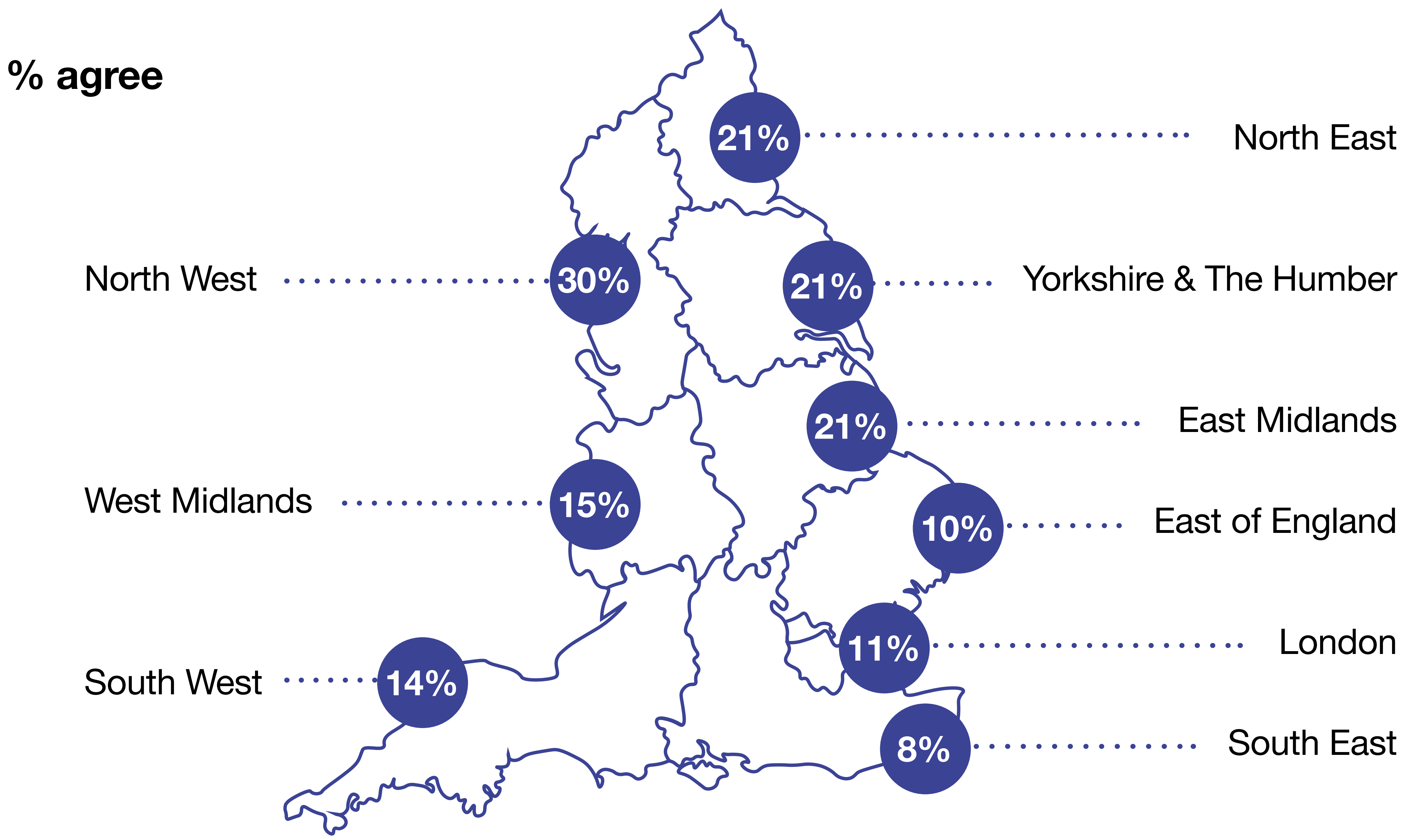
Figure 06 – And which two or three features of your neighbourhood would you like to see most improved?



Source: Ipsos MORI KnowledgePanel **Base:** All participants in England (8352). Fieldwork dates: 18-24 March 2021

On the whole expectations are 'muted', but slightly higher in the North

Figure 07 – To what extent do you agree or disagree with the following statements about the UK Government's levelling up agenda? The levelling up agenda will have a significant impact on my local area



Source: Ipsos MORI KnowledgePanel **Base:** All aged 18-65 in England (9875). Fieldwork dates: 22-28 July 2021

for deprived and vulnerable sections of society, better public services, improved life expectancy, jobs and support for starting up businesses, and more.

There is a similar pattern from our other research. People are often as important as place: for example, skills and employability are rated by the public as the most important factors that determine how someone gets on in society.[21] And other issues like opportunities for young people, public services, investment, shops, crime, housing and jobs are all seen as key areas to improve.[22]

But again priorities are not all the same everywhere, adding to the challenge facing the Government in defining and delivering levelling up – such a vision for improving regional inequalities is by definition going to have to deal with local variations. For example, once again looking at the differing types of area, in the 'Service and Industrial Legacy' neighbourhoods opportunities for children and young people, the range of shops, and jobs are all seen as key, while in 'Countryside Living' we can add new businesses, public transport and local health services. But in 'London Cosmopolitan' areas crime, housing and air quality are the top three.

Given all these challenges, and the deep-rooted nature of regional inequalities, perhaps it is not too surprising that so far the public are still to be convinced about progress. In August, only 22% thought the

Government had done a good job at "reducing inequalities between different regions, also known as levelling up", compared with 55% of who thought they had done a bad job – rising to 64% in the North of England.[23] Expectations are also somewhat muted, although here the pattern is reversed, with more in the North of England – and particularly the North West – believing that the levelling up agenda will have a significant impact on their local areas than in London and the South East.

The Prime Minister has called levelling up the "greatest project that any Government can embark on", and regional inequalities and all their implications for productivity and social mobility have long been a concern for the public. Delivering tangible improvements to people's lives, their children's lives and the places in which they live will though require a truly cross-cutting strategy that joins-up the myriad concerns that people have across the country in areas that face a wide range of different challenges. Ultimately the measure of the success of levelling up may depend on delivering whatever it might mean to you.

What will the UK recovery look like for business?

Juliette Albone
Associate Director

Successive lockdowns and the impacts of Brexit have led to major changes in the ways that UK businesses operate. What does this mean for the future?

As we emerge from the pandemic, we reflect on how the UK economy has proven resilient throughout 2021. However, given the variable nature of an ongoing recovery, UK businesses continue to face challenges (and opportunities) and how they respond to these will be critical to their future success.

Following the easing of COVID-19 restrictions in July 2021, UK GDP is estimated to have increased by 0.6% in September 2021 but is still 0.6% below its pre-pandemic level (February 2020).[24] In the recent Budget, the Chancellor of the Exchequer reported that the UK is set to grow by 6.5% in 2021.[25] This is accompanied with the promising ONS figures which indicate both employment growth and low

“Some sectors were better able to take advantage of the situation and pivoted or changed their business model or invested in their digital capabilities”

unemployment. Despite the economy holding up better than initially feared, growth has slowed as businesses continue to face challenges caused by labour supply shortages and supply chain issues, triggering rising inflation.

Sectoral imbalances impact growth

While all businesses have been affected to a degree by the dual shock of Brexit and COVID-19, certain sectors and types of businesses have suffered more than others.[26] For example, food services (pubs, cafes and restaurants) and the accommodation sector have been particularly affected by the pandemic.

Similarly, businesses that rely on travel have also been badly affected by the pandemic. Our research reveals that most businesses replaced domestic business trips with virtual meetings during the pandemic, particularly large and medium sized businesses. This survey suggests that virtual meetings will continue, and business travel is expected to remain below pre-pandemic levels.[27]

Sectors most impacted by the COVID-19 restrictions were more likely to receive Government-backed finance, with uptake highest in accommodation and food services, wholesale and retail and transportation. Staff were also more likely to be furloughed from these sectors.[28] Most firms were using the finance for working capital and cash flow requirements, and this was particularly seen amongst the construction sector.[29]

Some sectors were better able to take advantage of the situation and pivoted or changed their business model or invested in the digital capabilities of their business, particularly larger businesses and those in the manufacturing and service sectors.[30] Working from home was easier in some sectors (e.g. professional, finance, information, communication) where restrictions impacted their business operations less, and is likely to continue as ‘blended working’ has become more normalised.

However, the impact of changing working patterns, changes in

consumer behaviour and migration out of urban areas, especially in large cities such as London, could further impact badly hit sectors such as accommodation and food services who rely on a regular footfall. The economic impact of COVID-19 and Brexit differs across regions and could compound spatial imbalances.[31]

Supply chain issues driven by both pandemic and Brexit

The UK has seen significant logistical supply chain issues in recent months with delayed deliveries and a shortage of goods regularly making the headlines. In Ipsos MORI's annual survey of more than 100 business leaders from the top 500 companies (our Captains of Industry Study) in the UK, a quarter of Captains reported concerns over supply chain and the availability of products and services as the most important problem facing their business today.[32]

The degree of disruption again varies by business sector with changes in demand and consumption fuelled by the pandemic and rising material and supply costs impacting the supply chain. The latest ONS data shows disruptions were particularly noted in construction, accommodation and food service, retail and wholesale and repair of motor vehicles and motorcycles, with these sectors more likely reporting they were either not able to get the materials, goods or services they needed from within the UK, or had to change suppliers or find alternative solutions to do so and were more likely to report stock levels being lower than normal.[33]

Delays in shipping ports and cross-border trade has become increasingly complex (and costly) following Brexit. Customs intermediaries were asked about the barriers to preparing for full customs declarations when they would be required for all EU trade. While uncertainty about customs declarations requirements remained the top barrier, most notably, two in ten mentioned uncertainties about transit times and delays.[34]

Another key factor to the supply chain disruption is staff shortages, with the combined impact of Brexit, COVID-19 and global economic conditions all contributing. Logistics companies have particularly struggled with deliveries due to driver shortages and increasing levels of demand. Due to the impact of low skilled workers being unable to get a visa to come into the UK, business leaders envisage difficulties in recruiting new staff, staff shortages and increased investment in staff retention measures over the next three years.[35] As a result, this could impact the speed of recovery from the pandemic.

How businesses manage supply chain risk and business contingency going forward will be critical. With much of this being driven by technology, additional challenges of cyber security protection become ever more important. Four in ten businesses and a quarter of charities report having cyber security breaches or attacks in the last 12 months.[36]

Future outlook

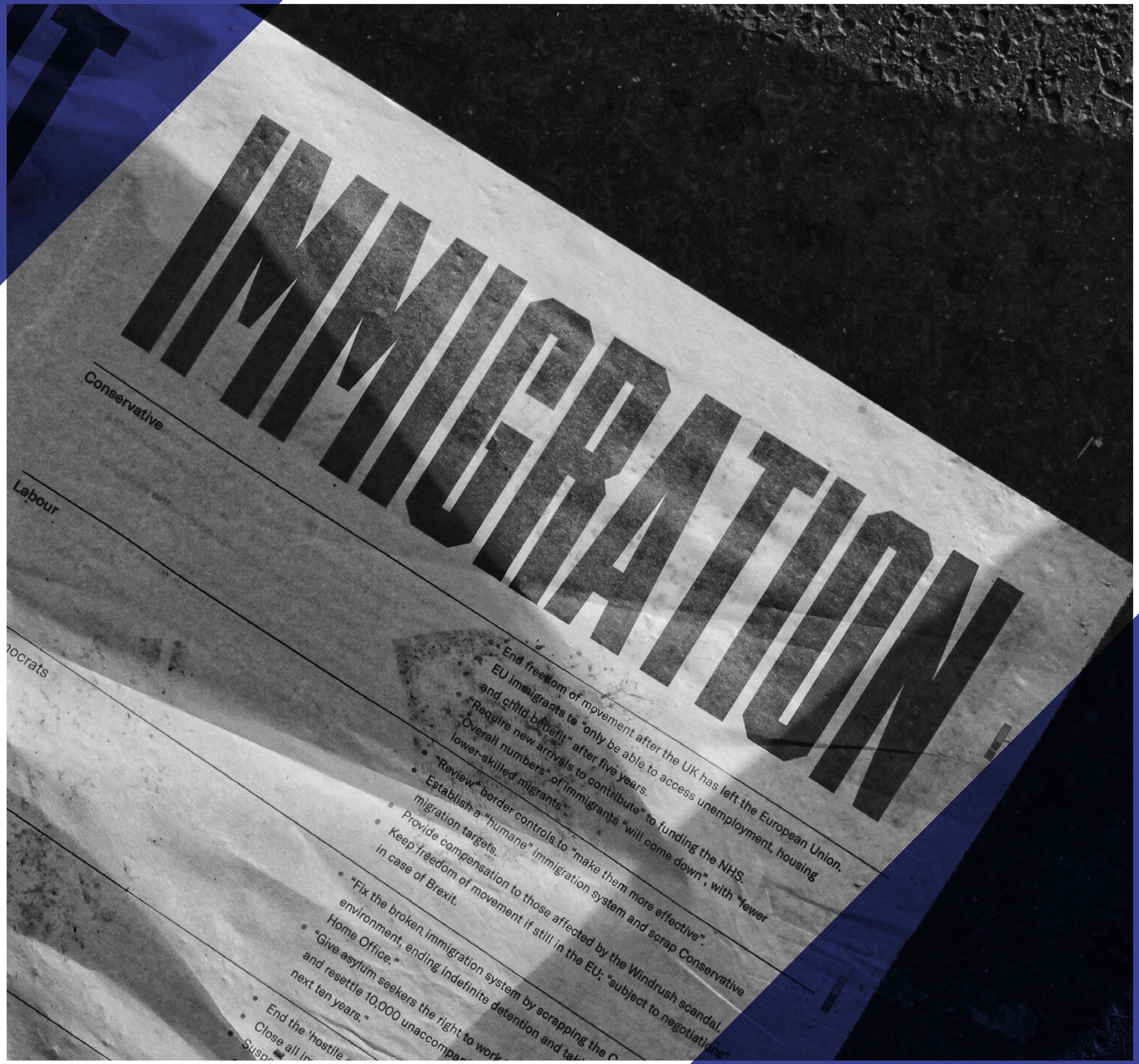
While Captains of Industry show optimism in economic recovery, with 8 in 10 expecting the situation for their own company to improve over the next 12 months,[37] supply chain issues, labour shortages and inflationary pressures look set to remain into 2022, with the year ahead looking to be a challenging one.

The UK is in a stronger place economically today than it was six months ago with employment recovering and wages increasing. However, the removal of Government support and the potential threat of new virus variants along with the variability of consumer spending due to a cost-of-living crisis, could make the start of 2022 a volatile period.

Balancing Britain's immigration needs with public expectations

Glenn Gottfried
Research Manager

After a short absence from the forefront of national discussion, immigration has returned to the news in light of the recent shortages in both supply chains and available workers (perhaps most notably the lack of HGV drivers in Britain). Before this though our Ipsos MORI Issues Index showed a significant decrease in the number of people saying immigration is a concern for the country since the EU referendum. In October this year, just 10% said immigration was a concern – a fair distance from its high-point of 56% in September 2015. Nonetheless since the beginning of the COVID-19 pandemic slightly more have become more concerned about immigration when it was at a lowest score of the past two decades in April 2020 (5%). This may be because Britain has since then left the European Single Market (and now has to rewrite its immigration policy) or because of the concerns surrounding the pandemic.

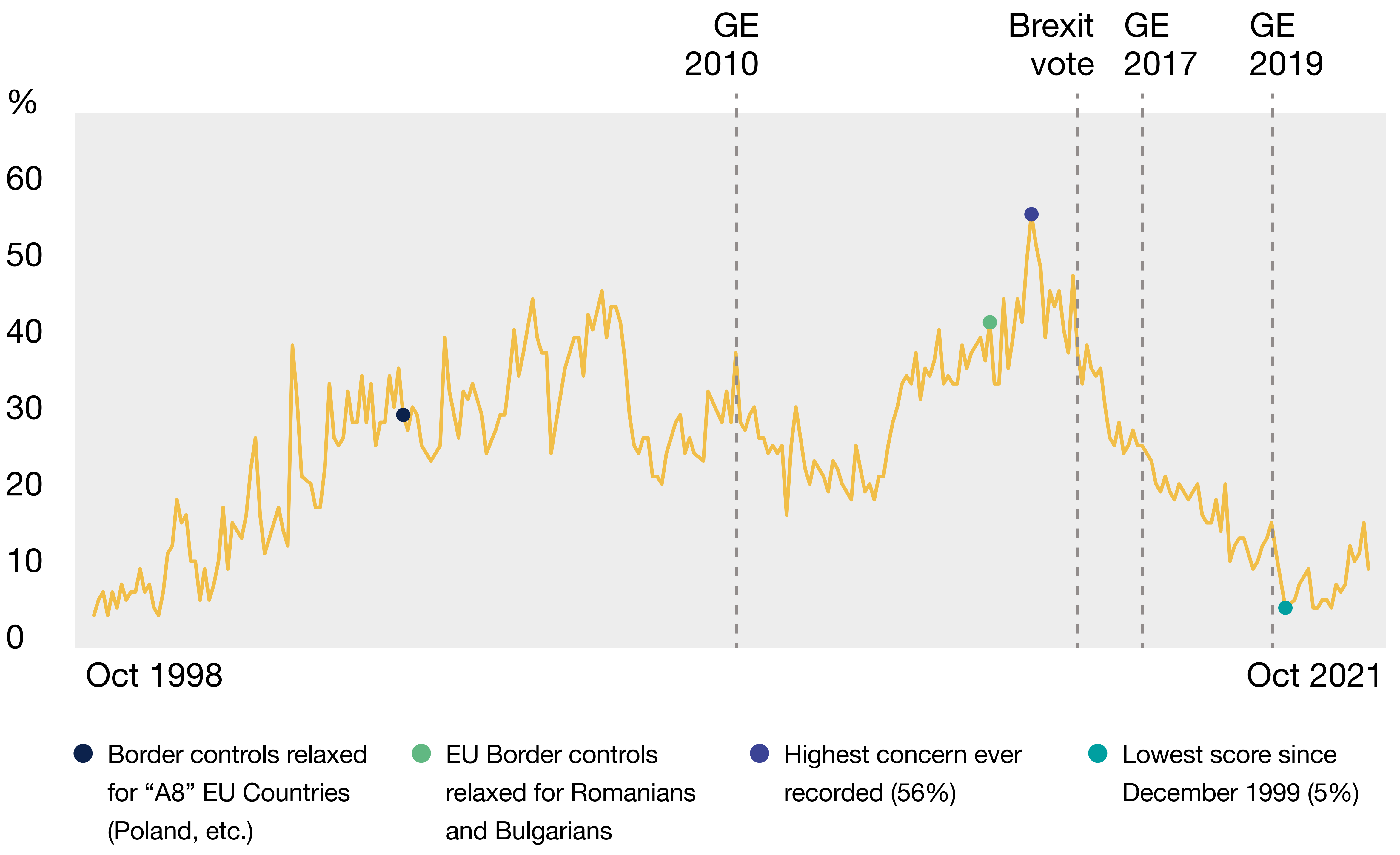


"**By June 2020, 21,700 more people left the UK than had arrived**"

It is expected that a combination of both the pandemic and Brexit have significantly changed immigration levels into Britain. While more updated data is yet to be released; the ONS data from earlier this year reveal more people left the UK than arrived between March 2020 and June 2020 (the time of the first lockdown). By June 21,700 more people left the UK than had arrived.[38] Businesses have been warning prior to the lifting of lockdown restrictions that several industries will suffer staff shortages as the recovery begins. The Confederation of British Industry (CBI), for example, had said in June this year that the government should relax post-Brexit immigration rules and update the shortage occupation list to include workers from more industries experiencing staff shortages.[39]

Ipsos MORI Issues Index - Immigration/immigrants

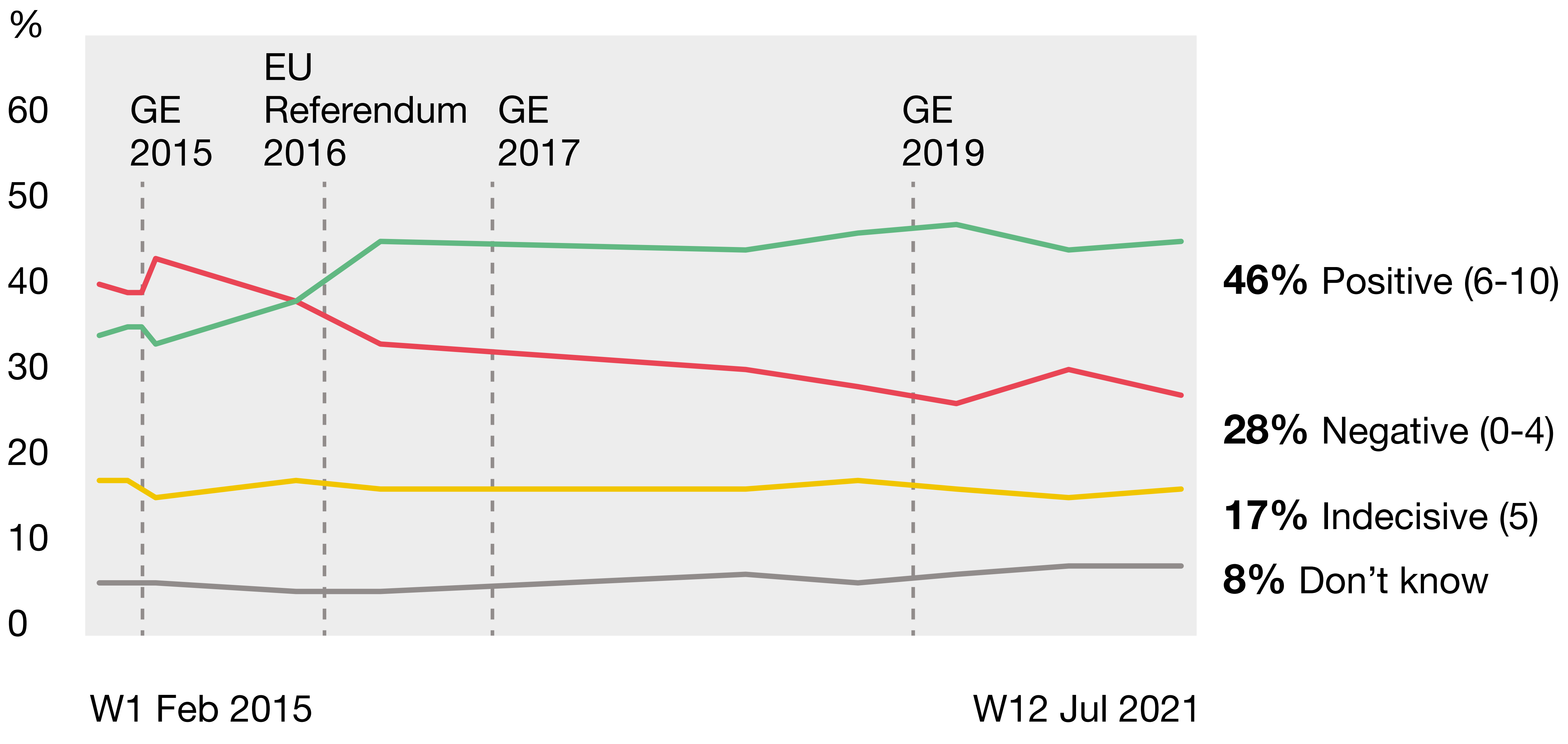
Figure 08 – What do you see as the most/other important issues facing Britain today?



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

Britons remain broadly positive about the impact of immigration with attitudes staying similar to what they were in November 2020

Figure 09 – On a scale of 0 to 10, has migration had a positive or negative impact on Britain? (0 is "very negative", 10 is "very positive")



Source: Ipsos MORI Unbound Immigration Attitudes **Base:** All respondents (W1: 4574; W2: 3770; W3:3023; W4:2698; W6: 4002; W7: 4071; W8: 2520; W9 2006; W10: 2100; W11: 2532; W12: 4000): Fieldwork dates: 18 June – 10 July 2021

Regardless of early calls from businesses to change visa rules it wasn't until autumn, after mounting pressure from the HGV driver shortage, that visa rules were changed. Despite these changes many businesses claimed these temporary visas were not enough and would not likely attract the number of workers from abroad needed.[40] The Government is undeniably in a challenging position balancing the needs of the economy with public expectations over immigration control. Our data on immigration attitudes however shows that there may be some flexibility within public sentiment to achieve both.

Our Unbound Immigration longitudinal survey shows Britons remain broadly positive about immigration's impact on the country since the pandemic began. In July 2021 46% say they are positive about immigration (28% are negative) compared to 48% in March 2020 (27% were negative). In July 2021 less than half (45%) said they want immigration to be reduced (the lowest score in the series since it began in 2015).

Britons traditionally have been less in favour of low-skilled immigration when compared to high-skilled migrants – for example in 2019 42% supported decreasing immigration of low-skilled workers into the country compared to 13% who wanted to decrease immigration of high-skilled workers. Considering recent events however Britons have showed willingness to allow immigration of workers of all skills where needed

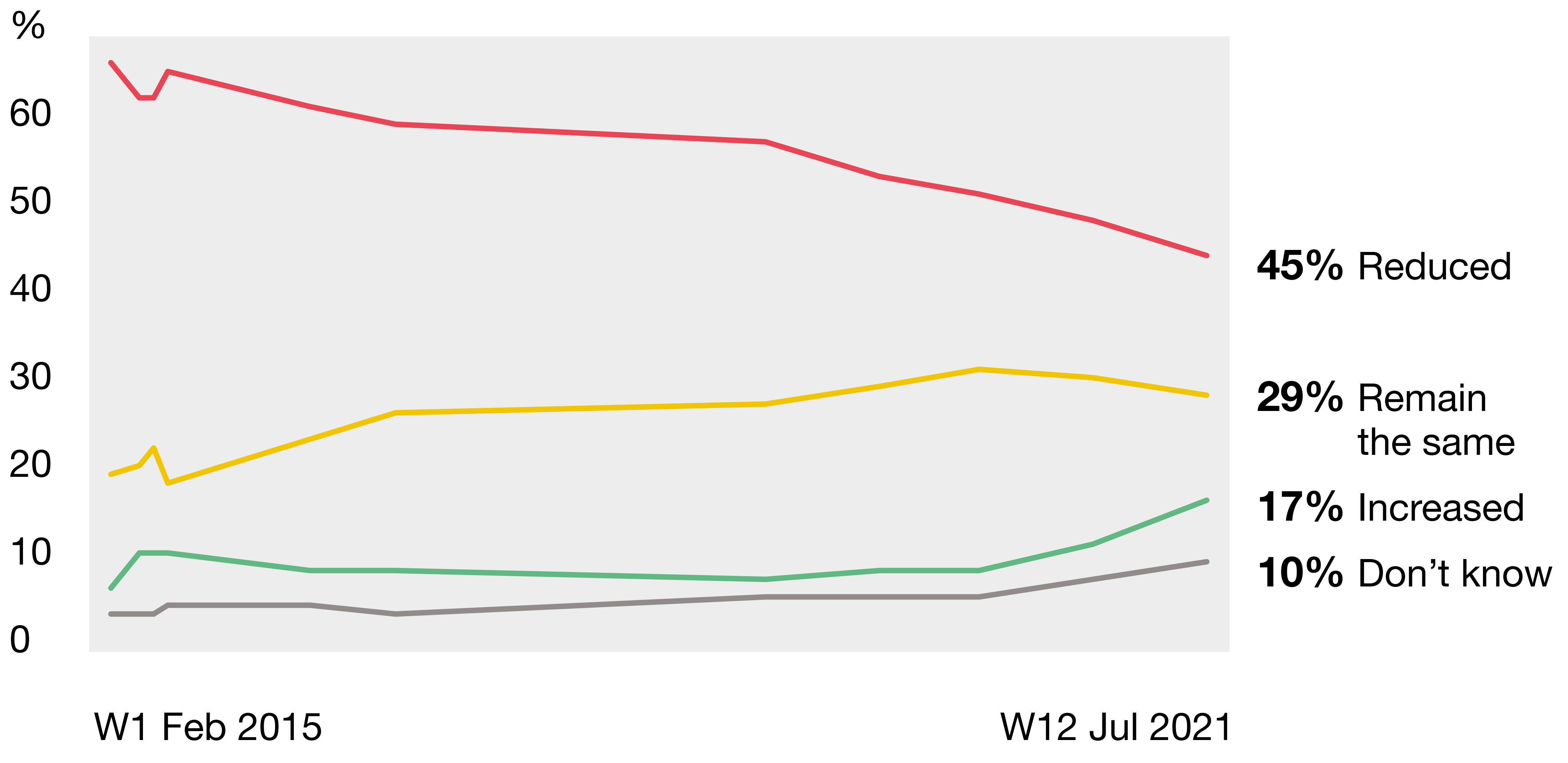
Two thirds of the public (65%) agree that employers should be allowed to recruit from overseas for any job where there are shortages

to help the economic recovery from the pandemic.

The most recent Unbound survey from July shows two thirds of the public (65%) agree that employers should be allowed to recruit from overseas for any job where there are shortages. Although support for recruitment from overseas remains highest in key services such as health and social care (77% of the public are in support of this), support is also high in areas such as temporary seasonal work in sectors such as fruit-picking and hospitality (supported by 67%). A majority of Britons (55%) also support recruitment from overseas for lower-skilled jobs that are hard to fill from within the UK.

July 2021 shows the lowest level of people wanting to see immigration reduced in the series as well as the highest level of those wanting to see it increased

Figure 10 – 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?



Source: Ipsos MORI Unbound Immigration Attitudes **Base:** All respondents (W1: 4574; W2: 3770; W3:3023; W4:2698; W6: 4002; W7: 4071; W8: 2520; W9 2006; W10: 2100; W11: 2532; W12: 4000): Fieldwork dates: 18 June – 10 July 2021

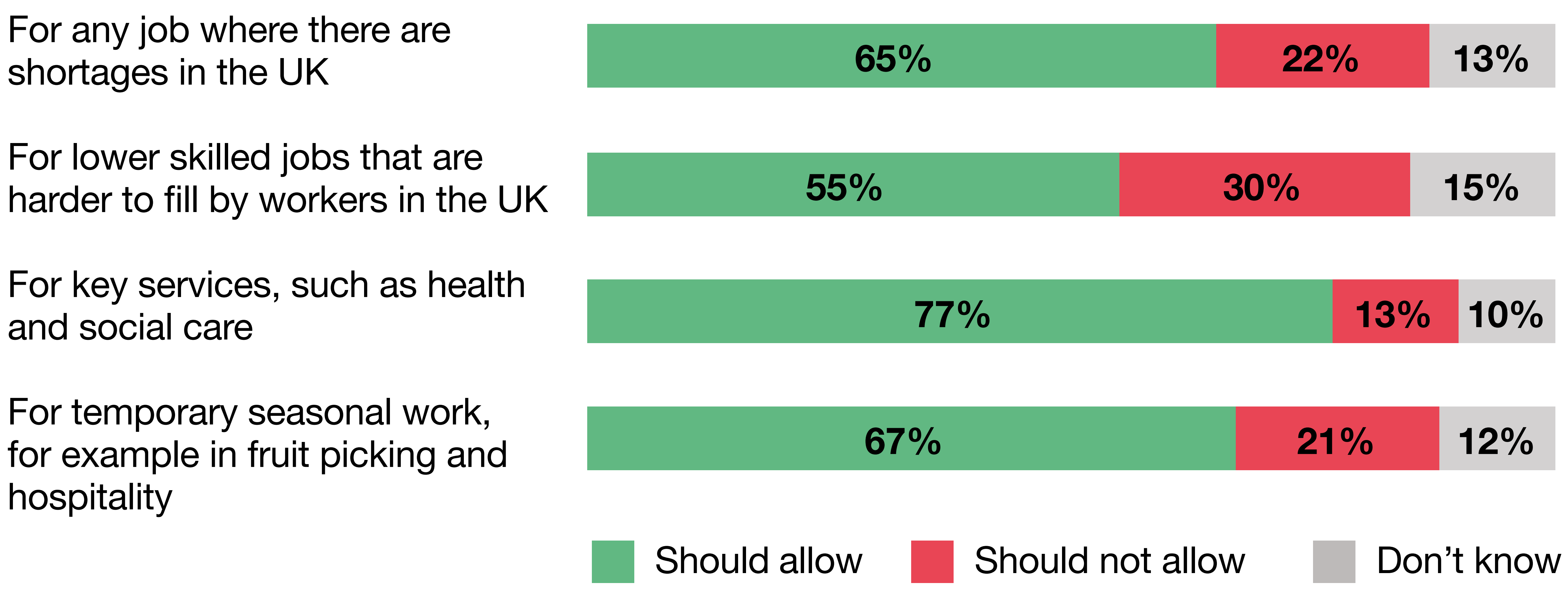
The latest wave also shows that nearly twice as many people favour an immigration system that prioritises the Government having control over who can and can't come into the country, even if that means immigration numbers are not significantly reduced (44%), over a system that deters people from coming to the UK so that numbers remain low (24%).

Our immigration data shows that immigration attitudes have softened since the time of the referendum. Britons are now more concerned about control over who can and can't come into the country rather than being engrossed in numbers. More importantly, the public are flexible when it comes to high vs. low skill-levels and are more focused on the needs of the British economy so long as the British government retains control over immigration decisions on behalf of the country. It's too soon to tell if this outlook will persist past the pandemic, however, any government would be right to take advantage of these attitudes to ensure economic recovery.

"Britons are now more concerned about control over who can and can't come into the country rather than being engrossed in numbers"

A majority think the Government should allow employers to recruit from overseas, particularly for key service sectors or areas of shortage in the UK. However, three in ten think this should not be allowed for lower skilled jobs

Figure 11 – For each of the following circumstances, please say whether the government should allow or should not allow employers to be able to recruit employees from overseas.



Source: Ipsos MORI Unbound Immigration Attitudes
Base: All respondents (W12: 4000): Fieldwork dates: 18 June – 10 July 2021

Global Britain in a post-Brexit world

Toby Piachaud
Senior Research Executive

It remains to be seen whether Brexit signalled a retreat into isolationism or an opportunity for an international Britain to look beyond Europe and engage with the rest of the world. The Government's vision of a 'Global Britain', laid out earlier this year in a speech in Parliament by the Prime Minister, sets out an intention to reinvest in Britain's international relationships, champion the rules-based international order and demonstrate that Britain is open, outward-looking and confident on the world stage. But the subsequent cut in foreign aid and the dishevelled withdrawal from Afghanistan calls into question just how 'Global' Britain will be, and how we will interact with the world's superpowers.

For all the talk from politicians about a Global Britain, how much do Britons actually want to get involved on the world stage? And how does the rest of the world view Britain? Looking at our data from 2020 and 2021 we see tensions between a Global Britain and a more cautious Britain taking a backseat on the world stage.

“There are signs that British confidence in our role in the world is shaken”

There is public appetite for Britain to take a leading role in the world. A clear majority (71%) agree that Britain should seek to either increase its influence in the world or keep it the same.[41] Meanwhile, most (87%) agree that Britain should set an example to other countries and be a ethical leader globally.[42] And two in five believe that even though Britain is not as powerful economically or militarily as some other countries it should try to punch above its weight, with only a quarter disagreeing.[43]

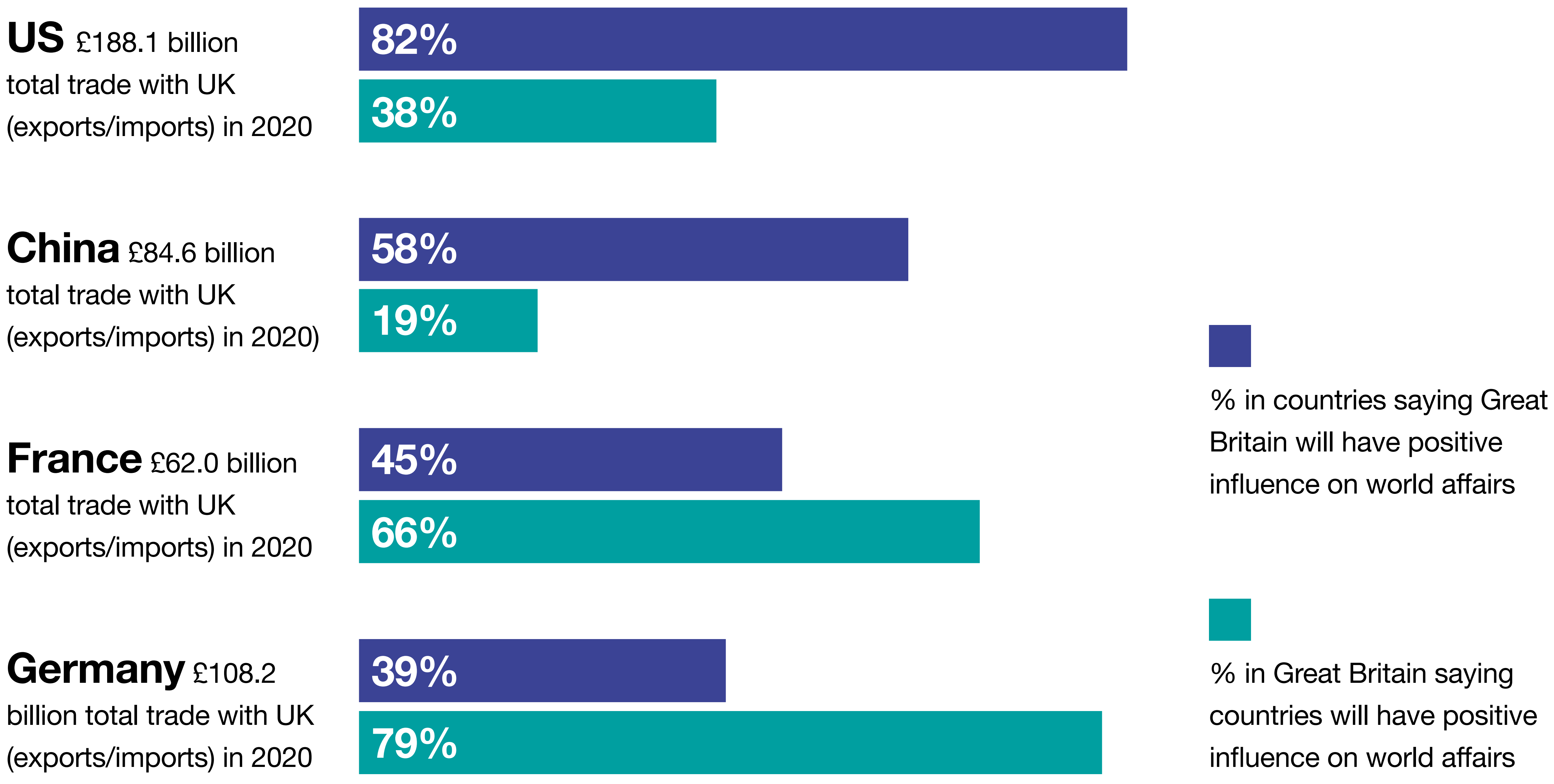
However, there are signs that British confidence in our role in the world is shaken, with more now agreeing (38%) that Britain should ‘stop pretending to be an important power in the world’ than disagreeing (28% – a fall of seven percentage points since 2019).[44] Despite this, according to our Global Advisor survey of 29 major countries, the rest of the world is generally positive about our role in the world – two thirds think that Great Britain will have a positive influence on world affairs over the next decade.[45] This is significantly more than other major countries score, such as the US (50%), India (50%) and China (42%), although behind Canada (81%) and Germany (78%).[46]

Internationalist sentiment is in conflict with public instincts pulling in the opposite direction. Almost three quarters (73%) think that given the current economic situation Britain should focus less on other countries and more at home.[47] The public are broadly supportive of the recent cuts to foreign aid; in August 2021 46% said they support the cuts, compared with 30% who think spending on foreign aid should be kept at 0.7% or increased.[48] And, although a majority (73%) support allowing people to take refuge from war and persecution, few (19%) are open to letting more refugees into the UK (39% want to be less open to refugees).[49] Despite this, there are signs that post-Brexit attitudes to immigration are softening, with the proportion of people wanting to reduce immigration (45%) on a par with those who either want to keep it at current levels (29%) or increase it (17%).[50]

Post-Brexit Britain lacks clarity on who its global partners might be. The public, both Leavers and Remainers,

Reciprocity of views on global influence of countries – Great Britain's top trading partners

Figure 12 – Thinking about the next decade, would you say the following countries or organisations will have an overall positive or negative influence on world affairs?



Source: Ipsos Global Advisor/Department for International Trade **Base:** GB respondents (n=1003); US respondents (n=1003); China respondents (n=1013); France respondents (n=1003); Germany respondents (n=1001)

want to maintain a close relationship with the EU, with four in five saying this is important,[51] and a consensus among Leavers and Remainers that this relationship should be focused on trade.[52] However, there is scepticism that this is possible, with almost half (44%) thinking that the current deal reached has not settled the UK's relationship with the EU and that there are many issues still to resolve and 44% thinking a close relationship with the EU is unlikely.[53] Furthermore, as the latest data from the ONS reveals that UK exports to the EU fell sharply in recent months, while exports to non-EU countries increased, the proportion saying Europe is Britain's most important relationship fell to just three in ten in 2021, from four in ten in 2020.[54] Leavers place greater emphasis on the Commonwealth and the US – with 45% saying the Commonwealth is most important to Britain and 28% saying the US.[55]

There are complications in trading with blocs beyond the EU when human rights and sentiment towards the global influence of these countries are taken into account. Half of Britons say we should only trade with countries with good human rights, even if it harms the economy, while only one in five say we should trade with any country if it benefits the economy, regardless of human rights.[56] Yet, imports from China have increased since Brexit, despite the fact that four in five of Britons think China will have a negative influence on world affairs in the next decade.[57]

Our ability to trade with other nations will of course be partly dependent on their perceptions of us. Indeed, some countries which Britons view favourably have less favourable views towards Britain. This is most notable in France and Germany,[58] where less than half view Britain's influence favourably, suggesting that while we should look to take advantage of positive perceptions elsewhere (such as in the US, South Africa, India and Mexico), we will also need to continue to work on maintaining good relations with our European neighbours.[59] The Government will also have to tread carefully when promoting its Global Britain foreign policy aims; the UK in a Changing Europe's recent publication highlights that countries such as Germany and China are wary of a Global Britain and see this coming into conflict with their own foreign policy aims.

Finally, looking at Britain's cultural influence, which the Government's Integrated Review of Security, Defence, Development and Foreign Policy described as 'the wellsprings of a unique soft power that spans the globe', Britain has considerable clout. Ipsos MORI research for the British Council showed that the UK is the most attractive country for young people across G20 countries.[60] While we are far behind countries like the US and China in terms of attractiveness to do business, our perceived strength in education and institutions are valuable assets that can be leveraged elsewhere.[61]

In summary, fears that Brexit would lead to the public turning inwards and Britain withdrawing from the world stage are not reflected in our data; the public overall still favour a Global Britain which remains a key power on the world stage. However, confidence that Britain can remain a key player has fallen. The public seem resigned to the fact that trade with the EU will be more difficult in a post-Brexit world and that Britain must look further afield for other trading partners. Furthermore, in future, concerns about human rights and aggressive foreign policies of trading partners could continue to come into conflict with objectives of globalising trade, and the public won't always have a single consistent view on the best balance for this. However, there are strengths that the Government can build on: Britain is still viewed favourably in many countries around the world – including many targets for new trade deals – and has many attractions for global talent. A vision that stresses the UK playing a leading role on future issues such as green technology and scientific innovation is also likely to fit with public priorities. Recovering from the pandemic remains a priority, but Global Britain hasn't gone away.

Build back local

Ben Marshall
Research Director

If “all politics is local”, the same can often be said of policy, certainly in the post-pandemic era with its focus on inquality and levelling up.

Geographic sensitivity can be added to the multiple disciplines and qualities now required to make, improve and evaluate public policy; more than ever, we need to understand local context and sentiment.

Regional and regeneration policy has been around for decades. Beloved of the Blair Government and manifested in its creation of Regional Development Agencies and ‘New Deals’ for communities, its current incarnations include levelling up and step-change investments in infrastructure, skills and local economies. These ambitions pre-date COVID-19 but were given extra urgency by the pandemic and the electoral salience of ‘Red Wall’ constituencies.

Last year, the Government reaffirmed its ambition of achieving an ‘infrastructure revolution’ with the catchphrase “build, build, build” describing a plan to increase capital spending to the highest consistent level since the 1970s (Joe Biden

“

Britons continue to prefer investment in social infrastructure to economic infrastructure

”

similarly made a huge stimulus programme a central plank of his legislative agenda). It will use a Towns Fund, Levelling up Fund, Future of High Streets Fund, freeports and freezones, allied to an acceleration of progress through permitted development rights, reform of the planning system and ‘Project Speed’.

This echoes public opinion in several ways.[62] Before COVID-19, Ipsos MORI’s qualitative research found a slight tilt towards more parochical worldviews, and this year fewer agreed that globalisation is a good thing for their country compared to 2019.[63]

Are people turning inward? Certainly, many people have worked, shopped, travelled (even holidayed) much closer to home, increasing the visibility of struggling high streets and potholed roads. In *Shaping 2025 and Beyond*, Ipsos Futures outlined three alternative trajectories for the future including one called ‘Local Power’.

“In a slower economic climate, citizens focus on regional economies, products and services... The local focus in economic and environmental policy helps to rejuvenate urban and rural spaces... however [it is hard] to ignore our global connections, so there are real tensions in this world.” [64]

Whether or not this turns out to be the dominant pathway, achieving quick improvements to bread and butter concerns will be a priority for central and local politicians who will be in a hurry to make up for lost time. As they rebuild, they ought to be mindful of public scepticism; as was the case pre-pandemic, a majority of people prioritise repairing and maintaining existing infrastructure in preference to new projects. Britons also continue to prefer investment in social infrastructure such as schools and hospitals to economic infrastructure, and more than before, in ‘green’ infrastructure.[65]

Local circumstances will vary; regions, cities and towns have different economies with some more dependent on hospitality, others on manufacturing. COVID-19 has apparently knocked London back, but other areas look set to benefit, especially if they can coax employers and employees into vibrant, attractive ‘15 minute’-style cities and town centres. Stockton-on-Tees plans to “repurpose, restore and reconfigure” the heart of the town, with a focus on “events…enterprise, green space and conviviality.” [66]

The stakes are high; it has been suggested that if ‘Zoom-shock’ (the impact of remote-working on working patterns) leads to the drop in regular commuting some are forecasting, major cities will see footfall at levels unseen since the late 1980s. However, our Future of Work report for Nationwide anticipated that talk of the demise of the city centre was likely to be exaggerated as large employers encourage workers back to the office.[67]

The importance of tailoring national policy ambitions to local contexts looks important even for the most global of issues. More than half of Britain’s councils have declared a climate emergency and net zero requires huge changes to the way we live but these will vary enormously by area. For example, in Hammersmith, London, less than 20% of the working age population commuted by car or van pre-pandemic, compared to 60% in ‘Red Wall’ Blyth Valley. Moreover, the means to nudge (or shove) behaviour, including access to good public transport, will vary markedly.

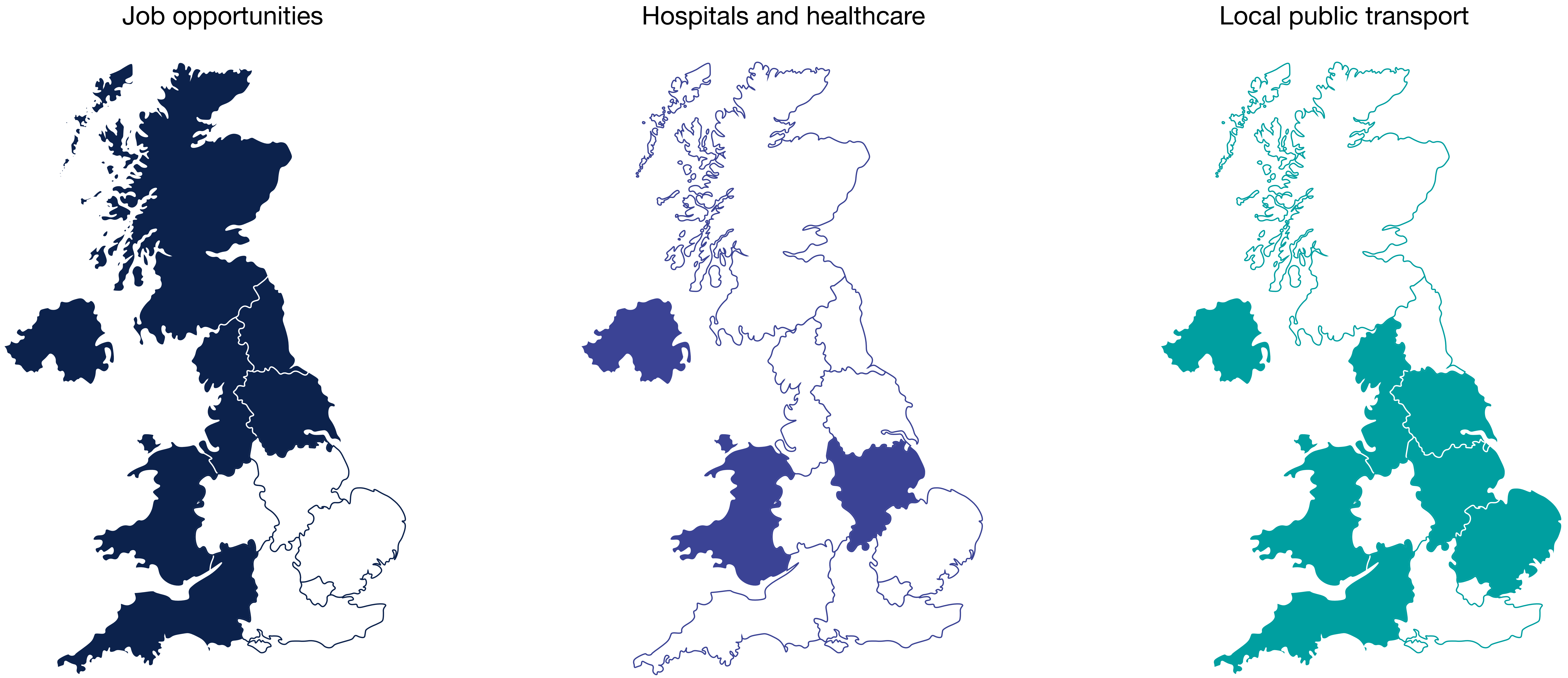
Birmingham has devised radical plans to reduce motoring by making motor vehicle journeys longer and more inconvenient.[68] Others will be

more circumspect, disturbed by vocal opposition to policies like Local Transport Neighbourhoods. The electric revolution will likely put huge pressure on car parking spaces and what Professor Jillian Anable has called "parking politics".[69] This may seem trivial by comparison to the future of our planet, but it's the kind of issue that requires careful attention and skillful handling locally.

So will local house building. Over the past two years our polling has found a slow-but-sure trend away from support.[70] Proposed reforms involving an algorithm designed to take politics out of planning have proved controversial among the public[71] and backbench MPs. 'Nimby' sentiment is often mis-understood.[72] When it takes

All priorities are local

Figure 13 – Shading indicates areas where the rating is significantly worse than the UK-wide average



Source: Ipsos MORI/Deloitte **Base:** 5,574 UK adults aged 16-75 (online), 21 Aug – 2 Sept 2021 hold, it often reflects the absence of a local narrative as well as legitimate concerns. Set against the longer-term imperative of ‘build, build, build’ is the short-term worry that the outcome of the Chesham and Amersham by-election is the thin end of an electorally costly wedge.

The tension between ‘protect’ and ‘progress’ has long been evident in British public opinion and at a local level too – for example, Liverpool lost its UNESCO world heritage site status because it was unwilling to deprioritise economic growth.[73] Many other towns and cities will need to debate similar trade-offs; for example, 10% of the buildings in Bath are listed and, as mainly older properties, these account for a higher proportion of carbon

All priorities are local

Figure 14 – Shading indicates areas where the rating is significantly worse than the UK-wide average

Source: Ipsos MORI/Deloitte **Base:** 5,574 UK adults aged 16-75 (online), 21 Aug – 2 Sept 2021 emissions.[74] Cumbria County Council backed plans for a new coal mine to create hundreds of jobs before it was encouraged to think again.

Where and what should we build? Some analyses suggest that the ‘green belt’ around cities is an impediment to growth.[75] Our research finds the public can be cool on the ‘green’ credentials of infrastructure projects if they involve building on greenfield even if they deliver long-term environmental benefits.

Looking ahead, there are numerous challenges associated with making policy in the recovery position. There will likely be some friction between the centripetal and centrifugal forces we’ve seen during the pandemic.

Policy-makers will need to achieve compatibility between ‘national’ and ‘local’ imperatives, an ambition which will apply equally to the insights and evidence used to make change happen.

There are 123 ‘priority 1’ local authorities across Britain according to the Levelling Up Fund Index – a third of the total

Barriers: how COVID-19 and health inequalities collided

Joanna Barry
Research Manager

The COVID-19 pandemic has brought health inequalities into sharp focus

Those facing health inequalities have a higher risk of exposure to COVID-19, and existing poor health puts them at risk of more severe outcomes if they contract the virus. At the same time some measures introduced to curb the spread of the virus have also left many of these same groups exposed to greater risk, whether through lockdowns, social distancing measures or delays to routine care. This could exacerbate health inequalities for years to come, unless appropriate action is taken.

Health inequalities are defined as unfair and avoidable differences in health between different groups within society. These arise because of the conditions in which we are born, grow, live, work and age. These

Those from ethnic minority groups are less likely to feel comfortable using their local hospital if needed during the pandemic

conditions influence our opportunities for good health, how we think, feel and act. In turn, these shape our mental health, physical health, and wellbeing.[76]

Our research has revealed specific access barriers to health services experienced by vulnerable groups

There is widespread evidence that some vulnerable groups – such as those living in disadvantaged areas, ethnic minority communities, older people, those with severe mental ill-health, people with a learning disability, refugees, and travellers – have struggled to access certain health services during the pandemic.

Some barriers, such as digital exclusion, cultural and communication barriers, and socio-economic barriers, existed pre-pandemic. Our national surveys such as the GP Patient Survey and the NHS Patient Survey Programme have highlighted such inequalities in access and experience of health services for a number of years.

Other barriers have emerged as a direct result of the pandemic, such as fear of exposure to COVID-19 or fear of infecting other family members (particularly a concern for those living in multigenerational households). Our recent research reveals how a long history of perceived poor experiences of care means that distrust in the NHS has deepened during the pandemic among Black Caribbean and Black African communities. Many participants from these groups report feeling let down by the health service, but this is also matched by concern about overburdening the NHS. Our research highlights the impact of this on accessing services. For example, those from ethnic minority groups are less likely to feel comfortable using their local hospital if needed during the pandemic (70% comfortable compared with 77% for other groups).[77]

The way in which these barriers are addressed will have significant implications for how vulnerable groups access care in the future.

There are complex issues of intersectionality between the causes and effects of health inequalities

Our research also reveals which groups of people are less likely to contact a GP practice or agree to a referral or treatment. This applies to some demographic groups; for example, people from Asian ethnic backgrounds are less likely to feel comfortable using GP and hospital services. But this also applies to people who share a set of attitudes and experiences; for example, those who would be uncomfortable visiting health services or having remote appointments.

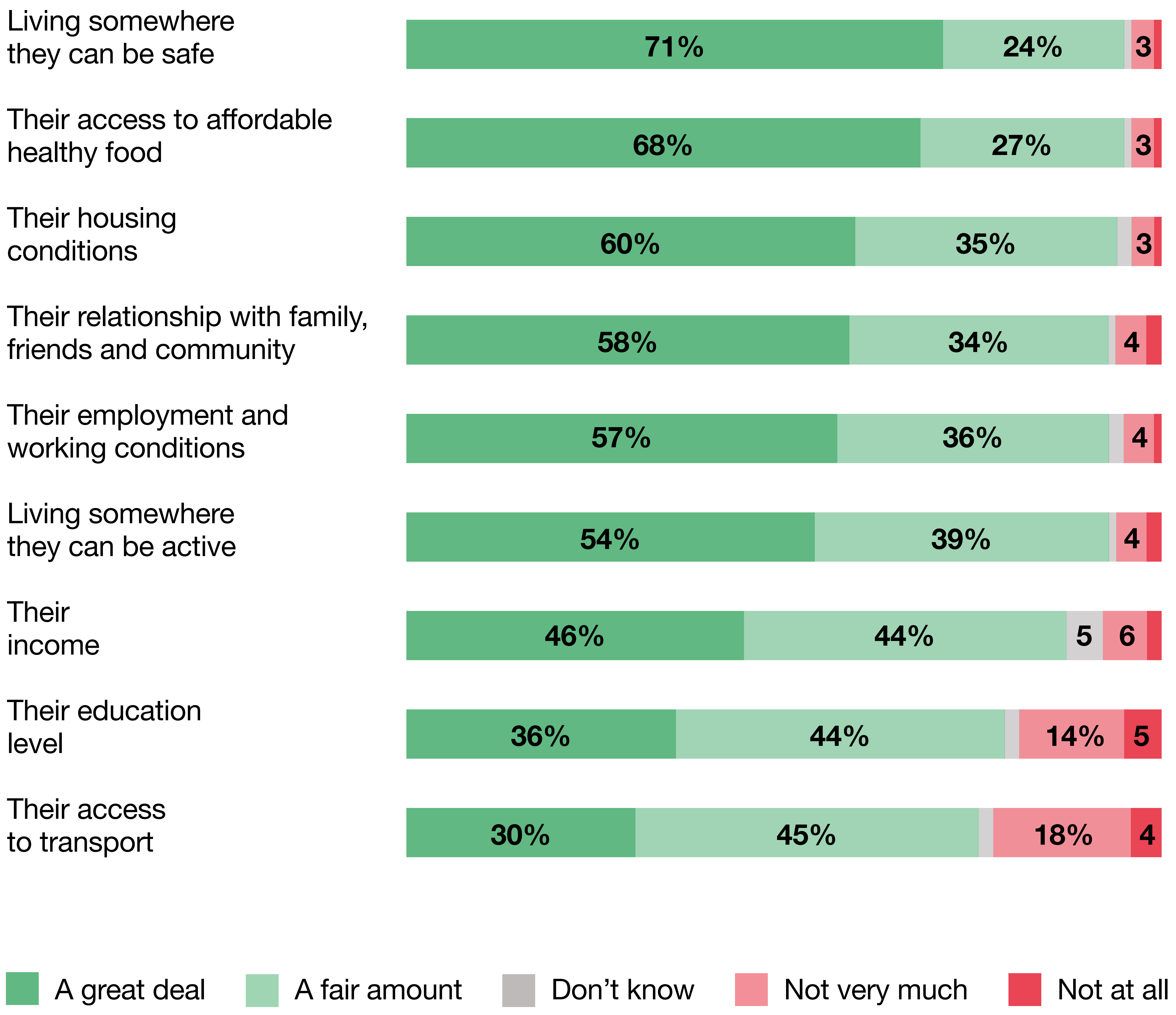
That said, perceptions and decisions regarding seeking care or treatment are nuanced, and looking by a single demographic group alone cannot always explain why inequalities exist. For example, while age is not necessarily an indicator of feeling concerned about using hospital services, age in combination with ethnicity or having a mental health condition can lead to greater concerns.

What do the public think about health inequalities?

Firstly, the public understand the complexity of the issue, demonstrated by their understanding of the importance of wider social determinants on people's chances

Impacts on people's chances of living a long and healthy life

Figure 15 – To what extent would you say that each of the following impacts on people's chances of living a long and healthy life?



Source: Ipsos MORI Health Foundation COVID-19 Survey
Base: All respondents (2,246 GB adults aged 18+, interviewed via telephone between 17-29 July 2020)

of living a long and healthy life. The majority recognise that each of the statements shown in Figure 15 have an impact on people's chances of living a long and healthy life, and think that living somewhere safe, access to affordable healthy food, and housing conditions are most impactful.[78]

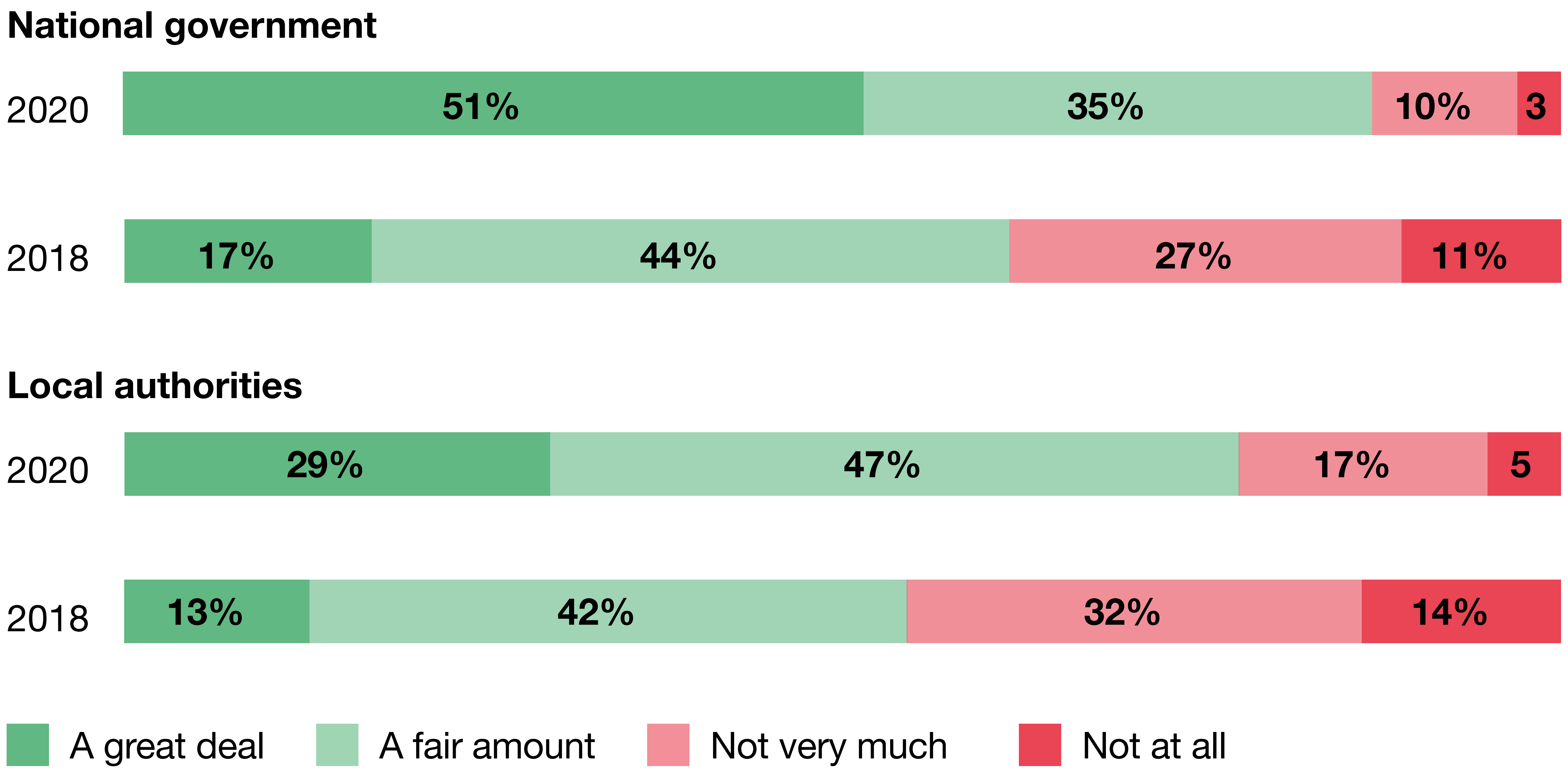
In addition, our research has shown that people care deeply about inequalities in access to NHS services. Our virtual dialogue and deliberative engagement programme conducted with Londoners found that they wanted the NHS to show flexibility and adapt to patients in vulnerable circumstances. They emphasised the need to avoid exacerbating any existing inequalities, for example by offering flexibility in location of treatment for those unable to travel.[79]

Increasingly, the public believe the Government has a responsibility for people's health. As shown in Figure 16, perceptions have changed since the pandemic, with nearly 9 in 10 people (86%) now believing that the UK government has a 'great deal' or 'fair amount' of responsibility for ensuring people generally stay healthy, significantly up from 61% in 2018. Similarly, 76% see local Government as also having responsibility for people's health (up from 55% in 2018).[80]

Finally, the public are willing to financially support the Government's efforts to address inequalities. Ipsos MORI's Political Monitor reveals around half (49%) of Britons want the Government to increase spending on public services, even if that means higher taxes or more government borrowing (although there are signs this support may be slipping in response to the very high levels of spending during the pandemic). The majority also say they are personally willing to pay more in taxes to fund the levelling up agenda to reduce inequalities between different regions of the country (51%). Before the Government announced their plan to raise National Insurance to help fund health and social care, two thirds of the public would support a one percentage point increase in National Insurance Contributions to help pay for social care reform (64%) or to reduce the backlog in the NHS caused

Responsibility of national and local government for ensuring people stay healthy

Figure 16 – How much responsibility, if any, do you think that each of the following have for ensuring that people generally stay healthy?



Source: Ipsos MORI Health Foundation COVID-19 Survey **Base:** 2020: 2,246 GB adults aged 18+, interviewed via telephone between 17-29 July 2020. 2018: 2,083 adults aged 15+ in the UK interviewed via face-to-face omnibus between 11-29 May 2018.

by the pandemic (65%).[81] That said, when faced with the reality of the extra tax, the public is split in opinion – a third (31%) support it and the same proportion are against it (33%). But there are many factors at play here, such as political partisanship, a feeling that even more money may be needed, and concerns about fairness of the policy towards the young and poorer people.[82]

Conclusion

Reducing health inequalities through a more concerted and systematic approach has been a key priority for the NHS even before the pandemic. The NHS Long-Term Plan highlights this focus, for example through commitments to target a higher share of funding towards geographies with high health inequalities, and to support local planning and ensure national programmes are focused on reducing inequalities. As we move from crisis management to recovery, the renewed focus on health inequalities is much welcomed, and could provide an opportunity for real change. Encouragingly, our research shows this is something that greatly matters to the public.

Waiting times and lists: the next big issue for the NHS?

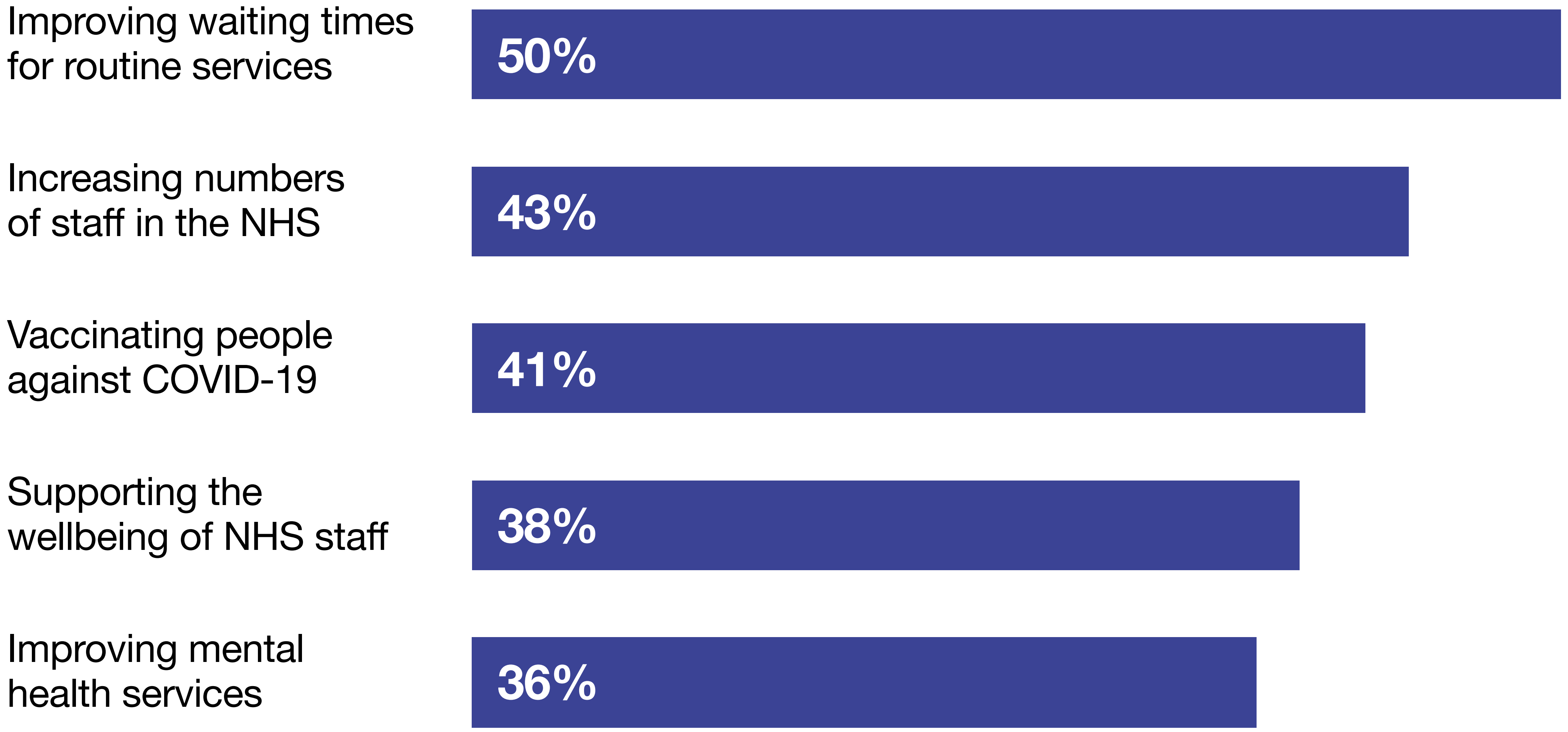
Spencer Rutherford
Research Manager

The NHS has always been a strong source of pride among Britons. Since 2012, a year when it was featured heavily in the London 2012 Olympic Opening Ceremony, polling from Ipsos MORI has consistently shown high levels of pride in the NHS. Prior to the pandemic, trust in British medicine was ranked as the strongest British value, and our level of satisfaction with public healthcare ranks among some of the highest internationally, with 75% agreeing that the NHS is among 'the best in the world'.[83]

The public's positivity towards the NHS appears to have been sustained despite the challenges brought about by the COVID-19 pandemic. In fact, confidence in the NHS' ability to cope with the virus has remained high over the course of the last 18 months, hovering at around 75% and only dipping to 60% once. Furthermore, patients have remained positive about the services they've received, including from their GP, throughout the pandemic.

Tackling the backlog is the top post COVID-19 priority

Figure 17 – Thinking about when the impact of the COVID-19 pandemic has eased, when it comes to the NHS, which two or three of the following do you think should be prioritised? (Top 5)



Source: Ipsos MORI KnowledgePanel **Base:** 3,588 GB adults 18+, 4-10 March 2021

However, the biggest challenge is still likely to come. As of the most recent NHS England performance statistics, nearly five million people are currently on the waiting list for routine hospital care – the largest waiting list reported since records began in 2007.[84] These waiting lists should not be taken lightly. A recent poll from Ipsos MORI found 61% of the public felt these waiting times were 'unacceptable' and it was ranked as the highest priority for the post-pandemic recovery.[85]

These concerns around waiting times are likely to feed into larger public anxieties around the future of the NHS. A recent wave of polling found 'failure of the NHS to deliver services' as one of the top concerns for 2021 – ahead of going into an economic recession and the possibility of another lockdown.[86] In parallel, the public also viewed the NHS as the top priority under the Government's Build Back Better initiative.

Clearly the British public maintains a strong affinity for the health of the NHS, and its forward trajectory is top of everyone's mind. However, addressing wait times will neither be easy or quick. The last time they were this high, in the late 1990s, it took ten years to get them down to acceptable levels through annual funding increases and market reforms. The current task is markedly more challenging given the circumstances.

Yet, there are reasons to be optimistic. As outlined in the NHS Long-Term

Plan, redistributing the NHS budget towards community care should help to alleviate pressures in other services and reduce wait times in the shorter term. In addition, focusing on preventative healthcare has the potential to pay off significantly and help to reduce wait times in the longer-term.

Paramount to these initiatives will be open and honest communications explaining the ongoing reality of the situation to the public. Given the high degree of concern but also pride, the NHS could go one step further and involve the public in decision-making as the recovery progresses. A reinforcing example is when patients reported difficulties accessing general practice services through the GP Patient Survey, the NHS refreshed national policy to require CCGs to extend the working hours of general practice by one and half hours in the evenings and on weekends. There are also several other ways policymakers could include the patient voice, including incorporating Patient and Public Involvement groups in policy development or conducting deliberative dialogues with patients around key policy issues. By engaging with this type of work, the Government has the potential to not only build back better, but also find collective solutions to create a more inclusive health system for all Britons.

Crime, courts and COVID-19

Hannah Shrimpton
Associate Director

When COVID-19 hit, the long-term story of crime in England and Wales was generally a pretty positive one. Although the rates of different types of crime could fluctuate year on year, crime overall has been in steady decline over the last two decades.[87]

You wouldn't know this if you just asked the public. They tend to be resolutely pessimistic – with the majority consistently believing crime has been on the rise over the same time period it's been in decline.[88] In 2019, nearly three quarters (72%) believed crime had gone up in the UK in the last few years – something which arguably isn't true (crime levels have almost halved in the last 10 years).[89]

Against this backdrop, the COVID-19 pandemic had a profound impact on crime and criminal justice in the UK. Lockdowns and restrictions seriously curtailed all but a select few types of crime as more people stayed home, limited contact and therefore reduced the opportunities for criminals. According to latest ONS figures for England and Wales there were significant decreases in theft (by 20%), criminal damage (16%)

The COVID-19 pandemic has had a profound impact on crime and justice in the UK

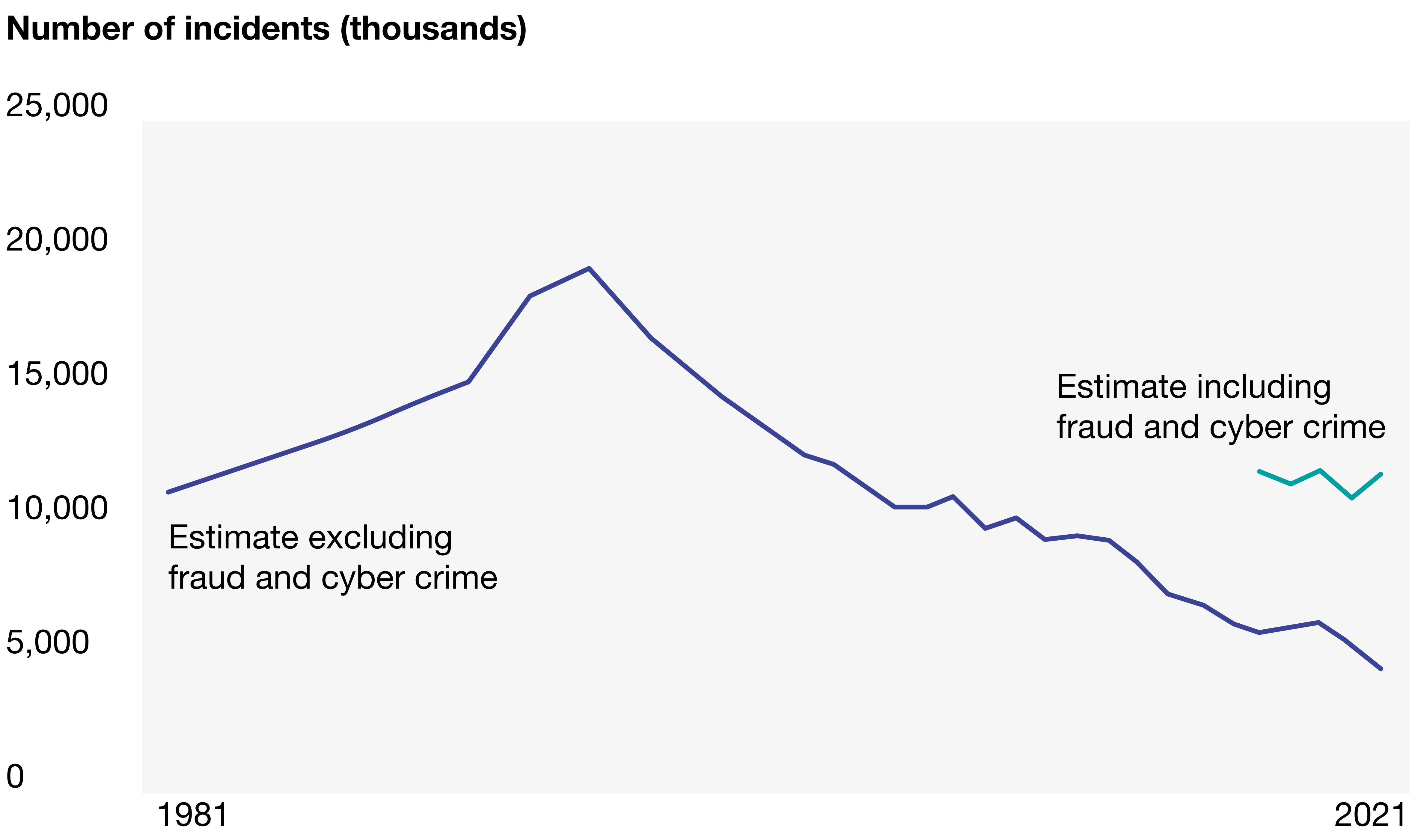
and violent crime (15%) over the year to March 2021 compared to the previous year.[90]

You can see the same pattern in police recorded crime, which gives more insight into lower volume but higher harm violence. Notably, the number of homicides decreased by 16%, there was a 14% fall in recorded offences involving firearms and a 15% fall in offences involving knives or sharp instruments compared to the year ending March 2020. The data shows the most substantial drops during full lockdown.[91]

However, not all types of crime took a hit. The 48% increase in police recorded cases of anti-social behaviour over the year can – at least

Crime has been falling in real terms since the mid-90s

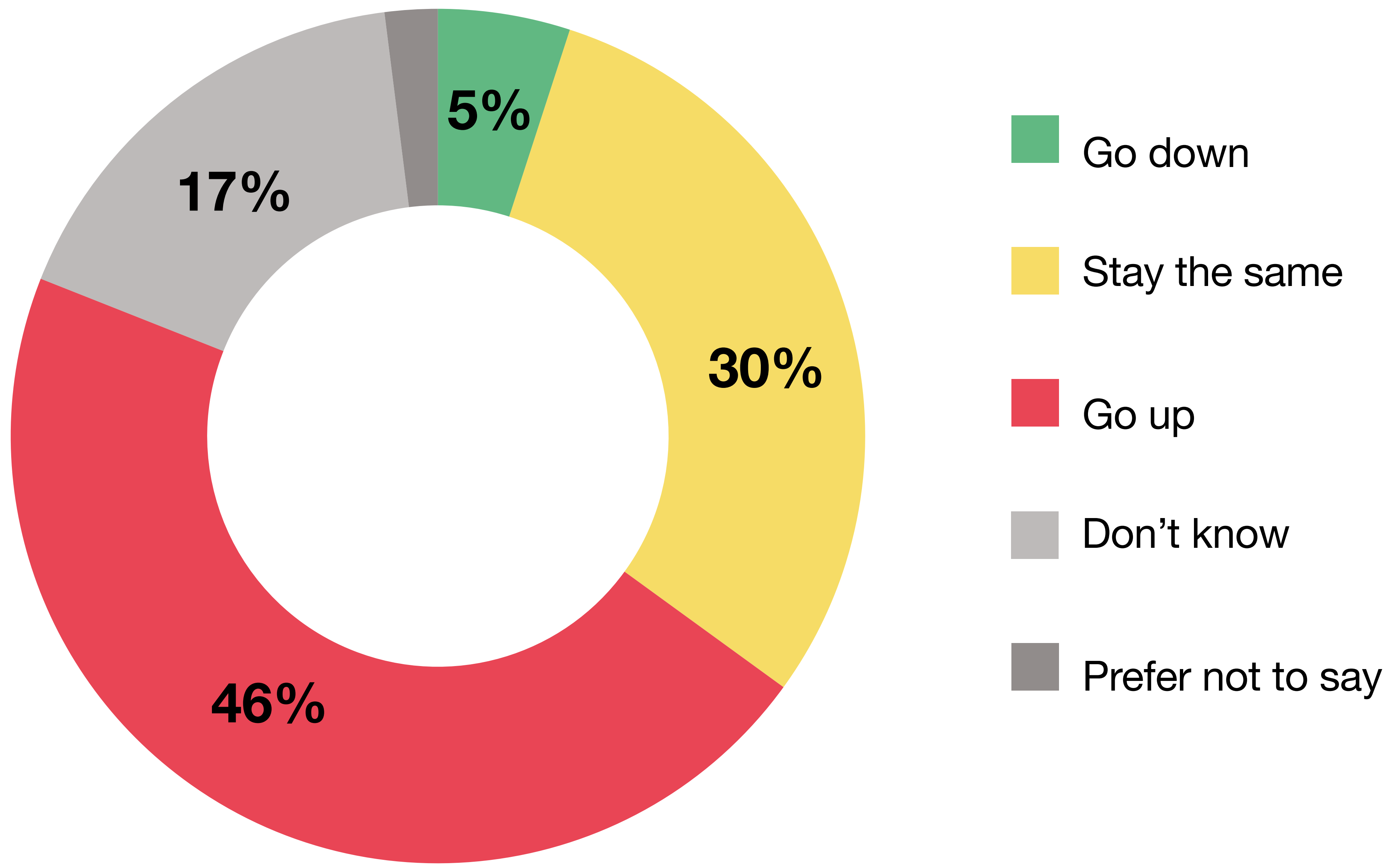
Figure 18 – Crime estimates from the Crime Survey for England and Wales December 1981 – March 2021



Source: Office for National Statistics - Crime Survey for England and Wales (CSEW) and the Telephone-operated Crime Survey for England and Wales (TCSEW) **Base:** Telephone Survey estimates for May 2020 – March 2021

Perception of crime levels in the UK over the next year

Figure 19 – Over the next 12 months, do you expect levels of crime to go up, stay the same or go down?



Source: Ipsos MORI Understanding Society **Base:** 2,006 Online adults in the UK aged 18-75, 3-4 September 2021

mostly – be explained by the inclusion of lockdown violation offences into this type of crime. Such a surge in anti-social behaviour is more a symptom of the unprecedented time and the mobilisation of police to enforce stringent lockdowns. Similarly, the increases in drug offences may not be down to more people buying and selling drugs than the previous year. It can be assumed that with fewer people out and about, the drugs trade became more exposed, giving police an opportunity to target dealers.[92]

In contrast, the surge in fraud and cyber crime incidences (up by 36% in the year to March 2021) is more tightly linked to genuine increases in criminal activities. As physical movements were reduced, much of our activities – shopping, socialising, banking - were funnelled into the online world. Crucially, users who didn't go online as much pre-pandemic started to use the internet far more regularly. There is evidence that the highest rate of growth in online retail sales over the pandemic was among older age categories: in July 2020 the participation of people aged 55+ in online retail had nearly trebled.[93] This mass movement online presented multiple opportunities for organised criminals and fraudsters to take advantage of.

And the impact on the criminal justice system was also profound – compounded by a courts system already vulnerable through long-term reduced funding. The backlog in the

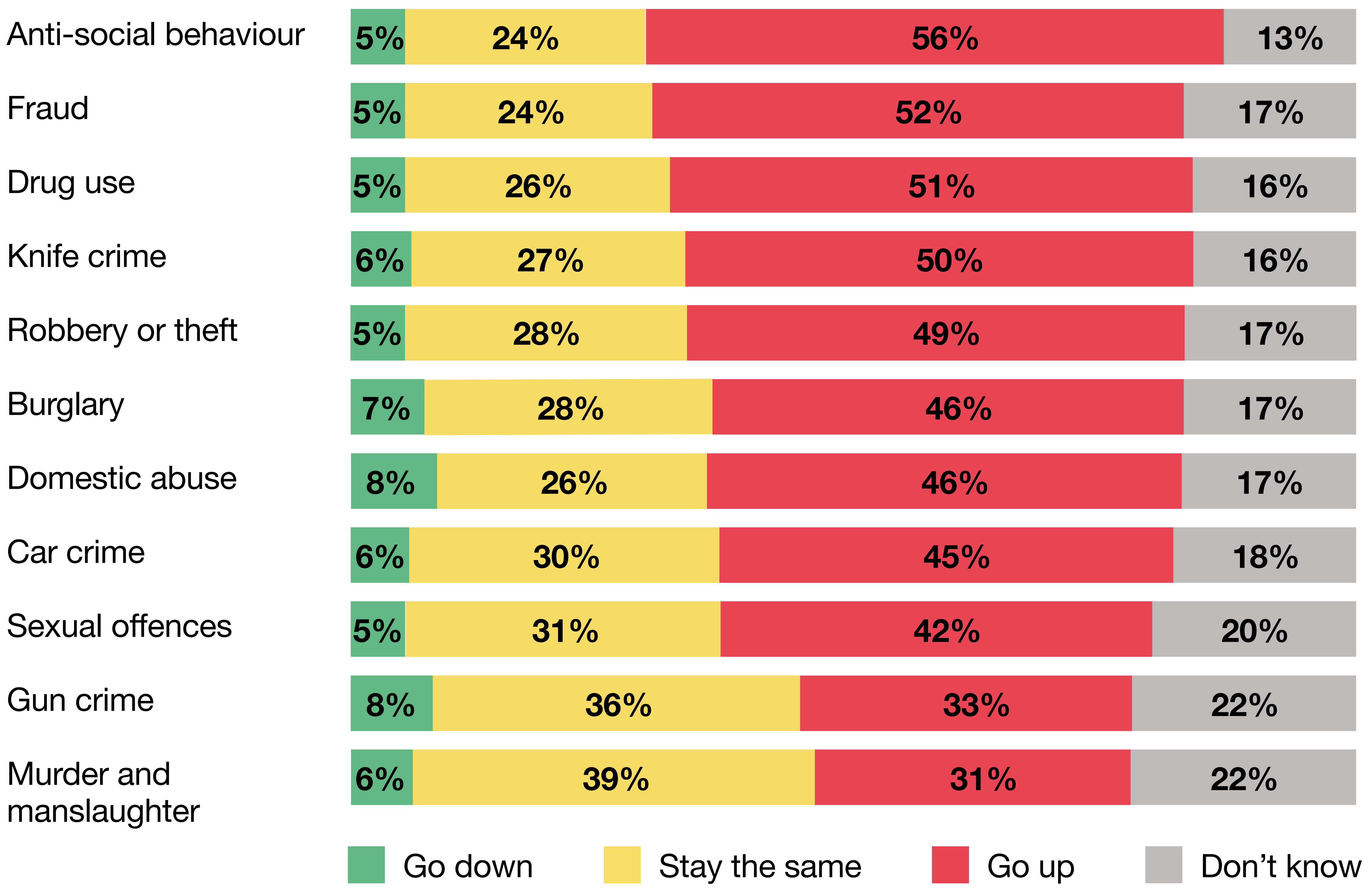
Crown Courts, which hears the most serious cases, had already increased by 23% in the year leading up to the pandemic. Despite efforts by the Ministry of Justice and Her Majesty's Courts and Tribunals Service to clear the way for cases, the backlog at the Crown Court increased by a further 48% from March 2020 to June 2021.[94] Although there were shifts to remote hearings – with tribunals and trials happening online – not all courts adapted effectively.[95] This means that large swathes of victims, witnesses and defendants are facing a long wait for justice, with concerns that backlogs will continue past 2024.[96]

So what is likely to happen to crime as life returns to some form of normality? As you might expect, the public are pessimistic. Our latest polling shows that nearly half of UK adults believe crime levels in the UK will go up over the next 12 months (46%). Only 5% expect to see crime go down, while 3 in 10 (30%) believe it will stay the same. Although we know public perception of crime should always be taken with a pinch of salt there are clearly concerns that last year was a one-off and that crime figures could bounce back with newfound vengeance.

The specific types of crime the public are most concerned about largely reflect those that genuinely did remain high throughout the pandemic. UK adults are most likely to expect anti-social behaviour (56%), fraud (52%), drug use (51%) and knife crime (50%) to increase over the next 12 months.

Perception of crime levels in the UK over the next year

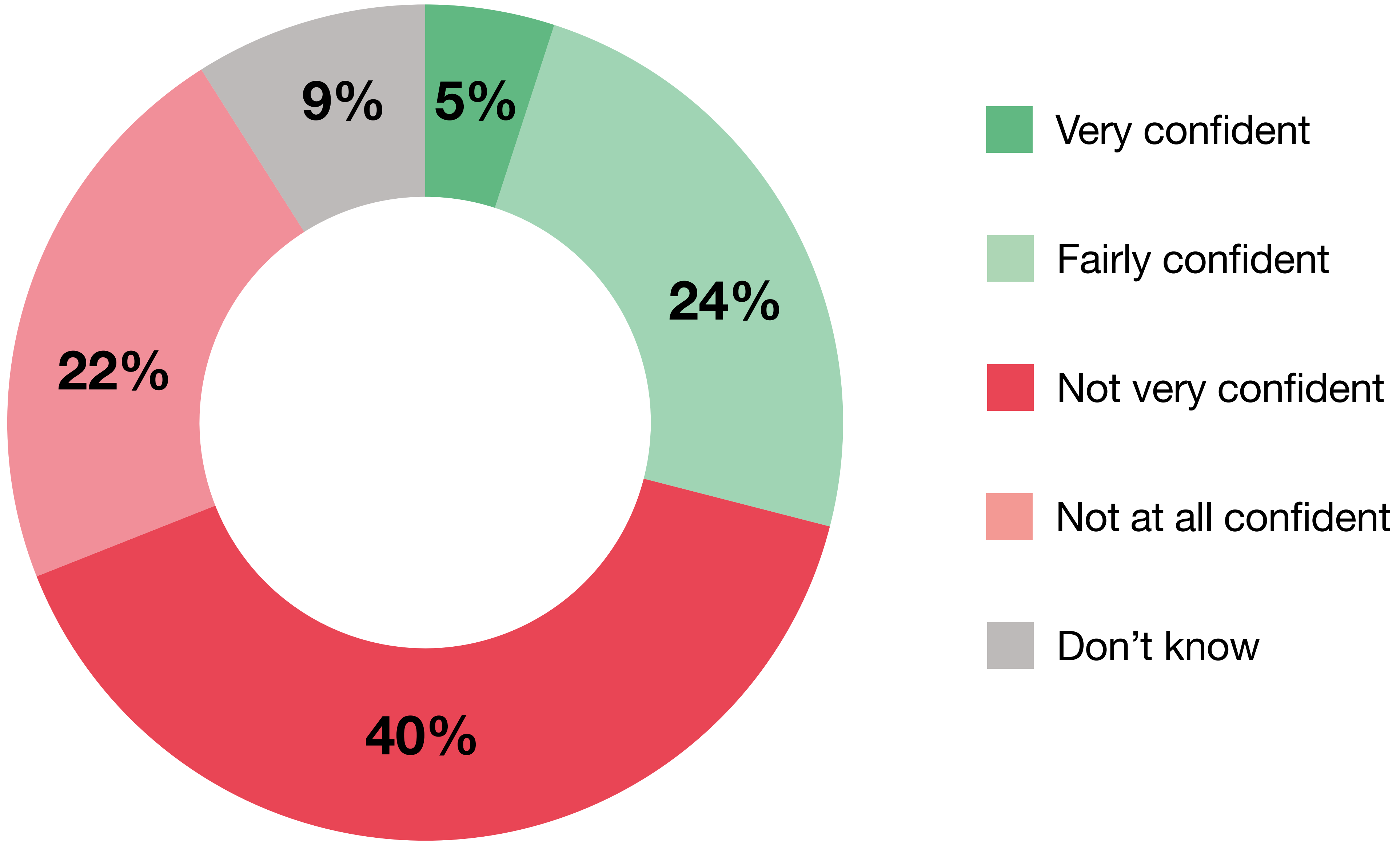
Figure 20 – Now thinking about different types of crime in the UK … Over the next 12 months, do you expect each of the following to go up, stay the same or go down?



Source: Ipsos MORI Understanding Society **Base:** 2,006 Online adults in the UK aged 18-75, 3-4 September 2021

Confidence in Government's handling of crime and justice

Figure 21 – Overall how confident, if at all, are you in the current Government's handling of crime and justice in the UK?



Source: Ipsos MORI Understanding Society **Base:** 2,006 Online adults in the UK aged 18-75, 3-4 September 2021

Concern about increasing crime rates isn't spread equally across the population. Older people are consistently more likely to think different types of crime (and crime rates overall) will increase. Over half of 55-75 year olds (56%) think crime overall will increase, compared to just over a third of 18-25 year olds (36%). White ethnic groups are also more concerned than ethnic minority groups and Conservative voters.

Perhaps they're right this time. Early projections indicate that we *could* see increases in sexual offences, violence, drug offences and public order crimes over the next couple of years.[97] In addition, research indicates that the average drops in violent crimes over the last pandemic year masked different types of variations – with the most deprived areas suffering spikes in these types of crime.[98] This suggests that the police and criminal justice agencies could face increased pressures as we move forward – with a risk that certain areas become crime "hotspots".

> **“The public overall do not have much faith in the Government or the police to tackle crime and justice”**

The public overall do not have much faith in the Government or the police to tackle crime and justice. Only 3 in 10 of UK adults are confident in the Government's handling of crime and justice in the UK (29%). Groups who were more concerned about crime remain less hopeful; less than a quarter of 55-75 year olds (22%) feel confident in the Government's handling of crime – with younger people having more faith (40% of 18-24s and 38% of 25-34s). Although the public has slightly more confidence in the police, still only four in 10 (41%) say they have faith in the police to protect them from crime, with just over half saying they do not (52%).

This raises serious questions for the Government on how to reassure a concerned public. When asked what two or three things from a list of options would do most to reduce crime in the UK, "more police on the beat" was the most common answer given (38% saw this as important). This is despite the ongoing initiative by the Government to recruit an extra 20,000 officers by 2023. This suggests that the recruitment drive has yet to be felt by the public and more needs to be done to assuage concerns and build up trust in the Government's ability to tackle crime. Overall, the Government and crime agencies face a difficult job over the next few months – juggling potential increases in particular crimes with a backlog in the courts and tribunals, while also trying to win back a sceptical and concerned public.

Digital services: getting Goverment online

Becky Writer-Davies
Associate Director

Digital first policy making has long been an ambition of the UK Government. Over the last 25 years successive Prime Ministers have spoken of the need to better integrate technology into the delivery of public services. While a number of positive steps have been taken – success stories being the launch of GOV.UK and the formation of departments, such as NHSX – it has proven difficult to deliver wide-scale change. Government is complex; developing systems and processes that work across departments is tricky.

The majority written on the subject to date has focused on the benefits of digital delivery and recommendations for its rollout within government. But what is it that the public want from their public services, and how open are they to an increasingly digital state?

The UK public hold a generally positive attitude towards public services in the

24%

prioritise the Government making more use of online or digital technologies in the provision of public services

UK. Research conducted by Ipsos MORI on behalf of EY[99] found there to be a high level of trust in hospitals and healthcare providers such as the NHS (79%) and other public service providers (69%) relative to the national Government (27%) and political parties more broadly (12%). The public reported that they were broadly satisfied with their experience of public services, although, when prompted, said that they could deliver greater value for money (24%) and improved customer service (20% said the speed or timing of their experience could be improved and a similar proportion that public services could be made more accessible).

The digitisation of public services is not always the first thing that comes to mind when people are asked what improvements can be made. When asked what would make the biggest difference to the quality of public services they received, the public most often said asking people what they wanted from public services (39%) and ensuring that public services were provided equally to all parts of the nation (38%). In contrast a quarter (24%) said that they wanted to see the Government make more use of online or digital technologies in the provision of public services.

Yet when asked what would most improve their experience of dealing with public services, the UK public tended to raise issues that technology could help to mitigate against. Two in five (44%) said that they would appreciate not having to repeat their details when dealing with different agencies or people, while a third (33%) said that they would like to have available a single Government website through which they could access all Government services.

These are not new desires, and indeed align with the current strategy of the Government Digital Service (GDS). In a recent blog post GDS committed to the development of a single sign-on for all online Government services by 2024 and outlined plans to support the continued development of GOV.UK, with the aim being to make it the single trusted source for Government information online.[100] Both actions would go some way towards reducing public frustrations with public services.

However, in order to reduce the amount of time that the public spend repeating their details, Government will also need to improve data sharing practices between services. This is a key aim of the GDS, who are currently exploring the development of an events brokerage service that would enable departments to share information about users that would be useful for other parts of Government to know. For example, when someone becomes a British citizen or is made redundant. However, research shows that the public are unsure about the extent to which they are comfortable with their data being shared in this way. A third (35%) say that they would support data sharing between departments where it will lead to improvements or efficiencies, but a similar proportion (39%) oppose data sharing within government, no matter the benefit.

Those who oppose data sharing typically hold a negative opinion towards technology more broadly, and express concerns regarding their privacy. If GDS were to press ahead with the development of its events brokerage system it would need to ensure that it provides the public with clear and transparent information about what data they hold and how this will be used in order to mitigate concerns. Collecting informed consent to share the data internally will also be essential.

Naturally there are members of the public more open to the use of data and technology by government. They

> **Research shows the public are split in the extent to which they feel comfortable with their data being shared**

are typically younger, well-educated and living in the UK's major cities. They see technology as a tool that can be used to empower people and improve society. And they are not alone. For EY's Connected Citizen programme, we have identified seven personae within the UK population, ranging from those heavily in favour of the use of technology in public service delivery, to those vehemently against:

- **Aspirational technophiles** are young, well-educated city dwellers who incorporate data and technology into every facet of their life.
- **Capable achievers** are pragmatic technophiles who embrace digital innovation when it helps them.
- **Diligent strivers** are young, proactive, self-improvers who expect seamless services from Government to help them achieve their aims.
- **Privacy defenders** value technology and the benefits it provides to them, but are extremely cautious when it comes to sharing their personal data with government or private companies.
- **Tech-skeptics** are distrustful of government and skeptical about the benefits of technology.
- **Struggling providers** are ambivalent towards technology, with less access and confidence in it to make a difference in their lives.
- **Passive outsiders** are detached from technology and generally reluctant to embrace change.

While there are those that would welcome and support the digitisation of public services, others will likely be excluded, either because they lack the skills or trust in Government to feel confident accessing services in this way. It will be important for Government to manage policy development around the needs, values, attitudes and behaviours of each group in order to ensure that changes work for all, rather than a select few.

The necessity of a green recovery

Sam Ridout
Associate Director

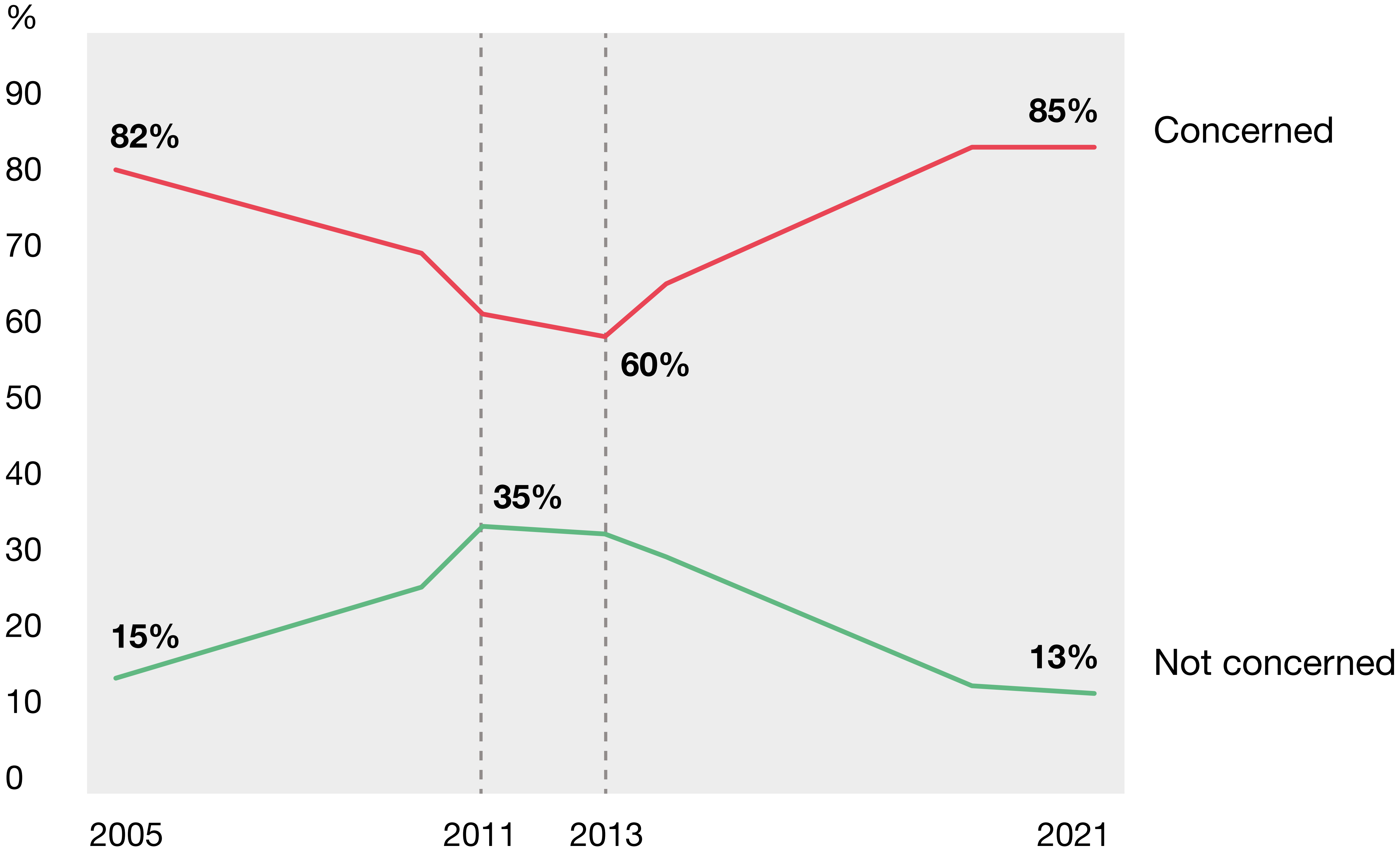
Climate action vs economic growth?

The climate and the economy have a history of competition. Climate action has often been presented and interpreted as coming at the expense of economic growth, and when it comes to priorities, the economy has typically come first. In the aftermath of the 2008 economic crisis, public concern for climate change reached a low point as economic concerns were prioritised – several years of apathy and inaction followed. However, despite the pandemic and the economic issues associated with it, our recent polling indicates that climate change will not slip off the radar this time. Concern about climate change remains at record levels, with 85% of the British public concerned.[101] In our November Ipsos MORI Issues Index,[102] pollution and climate change were the biggest concern for the country, ahead of the pandemic and the economy.

One reason climate change has not been pushed aside by other issues is

Public concern about climate change

Figure 22 – How concerned, if at all, are you about climate change, sometimes referred to as 'global warming'?



Source: Ipsos MORI Political Monitor **Base:** c.1,000 British adults 18+ each month

that we are now noticing the effects.[103] It has become increasingly difficult to ignore, affecting us now. Another is that climate action is no longer seen as a 'fair weather' goal, which can be set aside when more pressing issues emerge, but a priority that is linked to other issues – particularly the economy. There was little talk of a 'green' economic recovery from the 2008 recession, but it has become a cornerstone of post COVID-19 planning, framed by policymakers, businesses and NGOs as a catalyst for economic growth rather than a hindrance. There is an increasing focus on the economic opportunities of a greener economy, with 'climate plans' being presented as 'jobs plans', and warnings of the huge economic cost from not dealing with climate change.

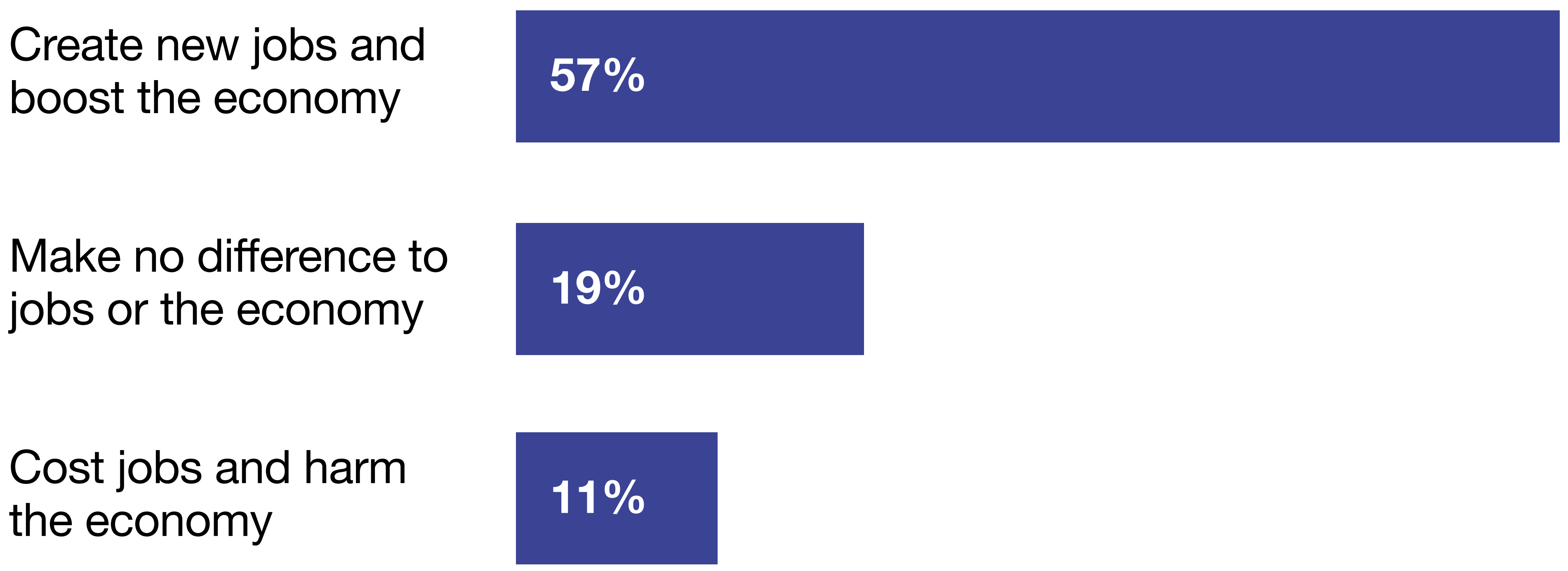
The general public also recognise the link between climate action and a healthy economy; 57% think that tackling climate change in the economic recovery will create new jobs and boost the economy, and 67% think that if Government plans for the economic recovery do not tackle pollution and climate change it will be bad for the economy in the long run.[104] People want the climate to be at the heart of the economic recovery this time.

> **“People want the climate to be at the heart of the economic recovery”**

The public believe tackling climate change will create new jobs and boost the economy

Figure 23 – If the Government chooses to tackle pollution and climate change in plans for economic recovery by, for example, investing in renewable energy and electric vehicles, which of the following is closest to your view?

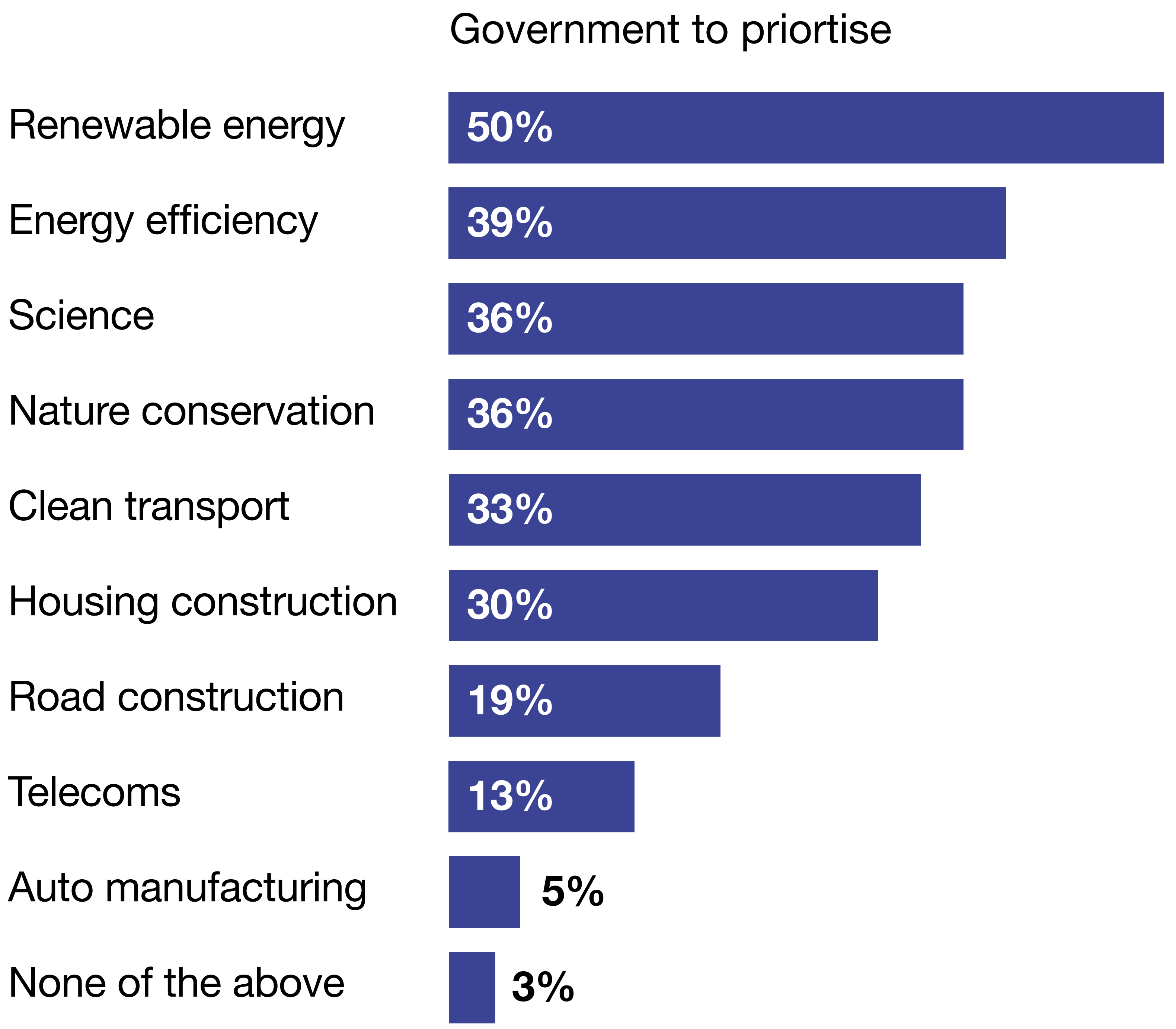
Tackling climate change in the economic recovery from COVID-19 will:



Source: Ipsos MORI for Conservative Environment Network **Base:** 2,178 adults aged 16-75 in Great Britain. Fieldwork dates: 24-26 June 2020. Data weighted by age, gender, region and working status. Proportions do not add to 100% because 'don't know' answers are not shown.

Support for green industries in the economic recovery

Figure 24 – If the Government chooses to support the creation of new jobs in the economic recovery, which of the following sectors, if any, would you like it to prioritise?



Source: Ipsos MORI KnowledgePanel
Base: 3,913 interviews online with UK adults aged 16+. Fieldwork 10-16 December 2020

People don't just want a green economy, they want to be part of it too

The public recognise the opportunity presented by a green economic transition, and it is an appealing one. There is a strong desire for 'green' sectors, such as renewable energy and nature conservation, to be prioritised by the Government when choosing which sectors to support for job creation.[105] 45% of the working population say they would get more satisfaction from a green job than their current one, with high levels of interest in working in green industries such as nature conservation (31%), renewable energy (23%) and clean transport (14%).[106] A strong public appetite for growing green industries in the UK, coupled with a desire to be involved in them, provides a good platform for the Government's net zero strategy, which aims to support up to 440,000 green jobs by 2030 in industries including clean transport, renewable energy, low carbon heating, energy efficiency and afforestation.[107]

A clear path for a green economy

While the public may be on board with the concept, there is much to be done to set the UK on a path for an effective green transition. To put the plans for a green economy into practice and make sure everyone is involved, people need more clarity on how we are going to

45%
of the working population say they would get more satisfaction from a green job than their current one

get there. While much has been said about a green recovery and a green revolution, people still see these as abstract concepts. In the UK only 3 in 10 (28%) think that the Government has a clear plan for how it can work with business and the people to tackle climate change.[108] The public need some clarity beyond the rhetoric so that they can understand what a green economy will look like in practice and what it might mean for them and their communities.

In 2021, Ipsos MORI conducted a Climate Assembly with citizens of Glasgow to understand how the city can work together to tackle the climate emergency. Top of the list of priorities was to have a roadmap for how Glasgow will adapt to the green economy with clear links between training, education, and concrete job opportunities.[109] The Government's net zero strategy sets out several broad commitments to boost employment in green industries and develop green skills in the workforce.[110] This is likely to be challenging without effective public engagement at a local level. Shifting to a green economy will be a monumental change, and a core principle in achieving it is that there is a 'just' transition, in which no-one is left behind. The opportunities offered by a green economy can facilitate the levelling-up of the country, but these opportunities will need to be available to all, and one of the first steps is making people aware of how it will be achieved, how it will affect them and how they can be involved.

The Glasgow Climate Assembly also found that people want to see an education system that teaches children and young people about the skills they'll need for a low-carbon future.[111] The implications of climate change and a green transition for the next generation is a key concern; in a survey conducted a few months after the first lockdown in 2020, 73% of the general public agreed that if Government plans for the economic recovery do not tackle pollution and climate change, it will harm future generations.[112] However, a green transition will not just be about educating and training the younger generation. Older age groups are also keen on green jobs, and so re-training programmes are likely to be effective. Citizens in the Glasgow Climate Assembly wanted to see subsidies

Green skills and interest in green jobs

Figure 25 – Which, if any, of the following sectors do you currently have skills and qualifications? Which of the following sectors, if any, would you personally be interested to work?

Source: Ipsos MORI KnowledgePanel **Base:** All participants who have a work status as 'not retired' -2,700 interviews online with UK adults aged 16+. Fieldwork 10-16 December 2020

and incentives for training to enter the green economy for workers at every stage of their careers. Initiatives like this will be key to addressing the current skills gap in green industries. Only a small proportion of the working population say they have skills or qualifications in green sectors such as nature conservation, renewable energy or clean transport, despite high levels of interest in working in these sectors.[113]

An economy that tackles climate change is no longer an ideal, but a necessity, and one which the UK public want to see realised. To create a green economy, the UK needs a green workforce. The potential is there, but to make a green economic transition at the speed required, people need clarity on how they can be part of it. Easy access to the training and education needed to take advantage of the opportunities of a green economy.

“To create a green economy, the UK needs a green workforce”

Building back greener everywhere

Sophie Thompson
Senior Research Executive

Jessica Bruce
Research Director

In March 2021, the UK Government published the Integrated Review of Foreign Policy which sets out the Government's vision for foreign policy until 2030. This presents tackling climate change and biodiversity loss as the Government's number one international priority. Their intention is to lead international action to accelerate progress towards net zero emissions by 2050, starting with the COP26 presidency in Glasgow. They would:

- **Start from home in reaching net zero by 2050**, to lead by example and build the UK's leadership in green technologies that will fuel the growth of the green economy, through policies such as the Ten Point Plan for a Green Industrial Revolution and funds like the Green Recovery Challenge and Nature for Climate Funds.
- **Act as a key facilitator of international consensus and action on climate**, starting with the

67%

of Britons felt that if the UK Government does not act now to combat climate change, then it is failing UK citizens

UK's role as President of COP26 in November 2021. The UK hopes to broker international agreements on long-term decarbonisation strategies, divest from fossil fuels, commit finance for climate adaptation and resilience, and strengthen international institutions to help with transnational challenges like climate change.

- **Provide support for emerging economies to help them with climate adaptation** and protecting and restoring nature. For example, the UK Government has pledged £11.6bn to International Climate Finance until 2025.

What do people in the UK think about this vision as a global climate leader?

It seems the UK Government has a clear mandate to take climate action. Our polling for Earth Day 2021 showed that 67% of Britons felt that if the UK Government does not act now to combat climate change, then it is failing UK citizens.[114] In 2020, research for EDF showed how the Government is seen as the key player in taking action on climate change. Despite this, only half of Britons (49%) believe the Government is acting now. Climate change is also a significant cause for concern, with 44% of those in the UK saying they were worried about climate change (ranking it 4th among all issues presented).

Support for the UK Government's international leadership on global challenges like climate change is high both within the UK and abroad. In our research for the British Council, 53% of those polled across 36 countries see the UK as a force for good in the world, while 54% believe it works constructively with other governments. These figures rose to 60% and 58% respectively among those surveyed in the UK. Moreover, around half (51%) felt they trust the UK Government, placing it second only to Canada. When looking specifically at responses within the UK, as many people surveyed felt that the UK should prioritise advancing international cooperation and addressing global challenges (22%) as pursuing its national interest above all else (19%), and 35% wanted an equal balance of both. This is backed up by recent research for the Global Commons Alliance, where 3 in 5 (60%) of those surveyed in Great Britain support nations across the world working together to solve global challenges. The positive perception of the UK as an international actor coupled with domestic support for the UK to take a significant role in advancing international cooperation around global challenges – such as climate change – bodes well for the Government's vision for being a global climate leader.

Bold action is needed across the planet as a whole, and the British public support a broad range of specific international actions to tackle climate change. First, the UK must play its part domestically; our most recent polling found that over half (56%) of Britons surveyed support the UK Government leading by example, by reducing emissions at a faster rate than other countries. Related actions that would show the UK leading by example were also supported by the majority of participants, such as banning the import of goods linked to deforestation (60%) and divesting from fossil fuel projects overseas (51%). Similar actions have been included and pledged in the Integrated Review.

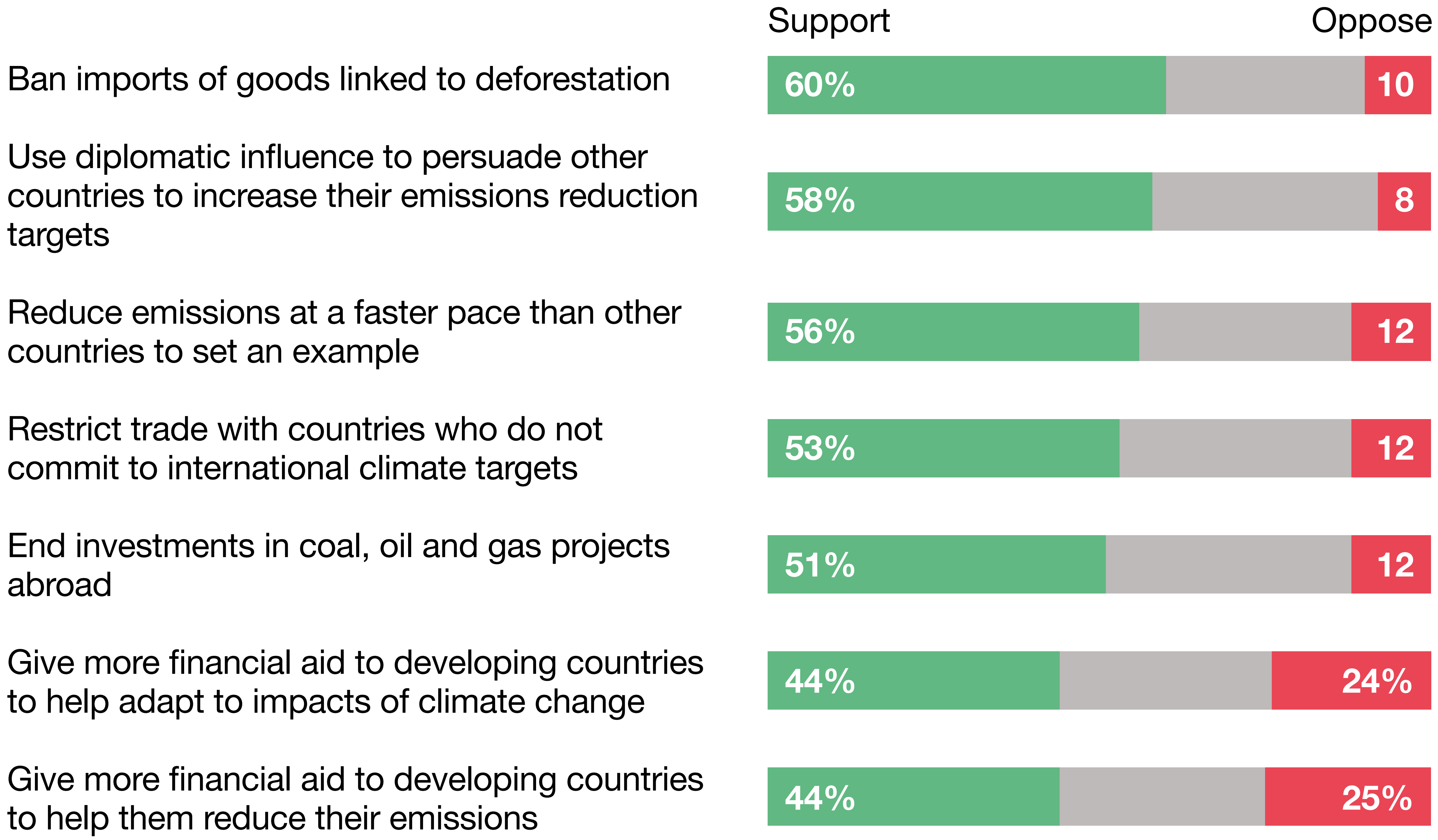
There is also support in the UK for international action. There are high levels of support for the UK facilitating consensus on climate action and encouraging countries to meet their climate objectives through economic

means. Fifty-eight percent support the UK Government using diplomatic influence to persuade other countries to increase their emissions reduction targets, while around half (53%) support restricting trade with countries that do not commit to international climate targets. Support for the latter may come as a surprise, given the use of economic levers to influence global supply chains (and ultimately, to reduce the emissions of goods consumed in the UK) was raised as a concern in the Climate Assembly UK due to potential impacts on the UK economy. Continued conversation with the public will be needed to keep them on board with the UK's vision.

On the other hand, while providing funding to other countries to reach their climate objectives may be a more straightforward approach, support for this is lower. Support was lower for giving financial support to developing countries for climate change adaptation (44%) and emissions reduction (44%), with funds like the ICF being a key part of the UK's plan to help other countries meet their climate objectives. This may link to greater scepticism toward international aid in general, especially within the context of a constrained public budget. Developed nations have not yet met their target to provide $100bn a year of financial support for this, and given the fact that developed nations' past emissions have contributed to extreme climate effects, it can be argued there is a clear moral imperative to meet this commitment.

Support for international actions by the UK Government to address climate change

Figure 26 – To what extent, if at all, do you support or oppose the UK Government taking the following actions to address climate change?



Source: Ipsos MORI Environment and climate change survey **Base:** 2,046 Online British adults 16-75, 29 July 2021

Given recent cuts to the UK foreign aid budget, this is a conversation that needs to be revisited, with messaging required to boost public support.

Given high levels of concern for the environment and strong support for Britain's leadership on climate change and other global issues, the timing is right for international action. However, a challenge for the Government will be maintaining this support, particularly if climate action globally comes with economic costs at home. Communicating the benefits of climate action, particularly the economic benefits, will be necessary to maintain the public's support; tapping into the public's sense of pride in Britain's global leadership, as highlighted in Global Britain in a post-Brexit world by communicating positive impacts around the world. This will also help support the Government's international ambitions.

"Communicating the benefits of climate action, particularly the economic benefits, will be necessary to maintain the public's support"

End notes

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