



Global Counsel

Polling Digest

Overview of UK public opinion

June 2023



Overview

Key themes

- 1 The national mood remains depressed, with continued alarm about the cost of living and perceptions of collapsing public services.
- 2 6 months after Sunak launched his 'Plan for 2023', dissatisfaction with government is still widespread, with no cut through on his key pledges.
- 3 Though there is little enthusiasm for Labour among swing voters, the 'time for a change' sentiment is increasingly embedded and reflected in Labour's consistent poll lead.
- 4 Housing is an increasingly prominent issue for voters but, despite support for increasing housebuilding, building on greenfield sites is deeply unpopular.
- 5 While not currently a top-of-mind issue, there are several potential concerns about the use of generative AI in education - and widespread support for regulation.

This latest edition in our regular overview of UK public opinion draws on GC's focus groups, a nationally-representative survey, and analysis of published polling data. It provides a snapshot of the mood of the nation, including policy priorities, attitudes to businesses and other notable trends shaping the political landscape that corporates and investors should be attuned to.

The last month has seen both Conservatives and Labour elaborating on key parts of their emerging election narratives. Rishi Sunak has attempted to demonstrate grip on issues such as inflation and immigration. Keir Starmer has sketched out plans for how he would reform the NHS to ensure it is 'fit for the future'.

At the same time, both leaders have been distracted by squabbles in Westminster. Sunak has had to contend with controversy over the extent of government transparency towards the inquiry into the handling of the covid pandemic. Starmer has faced criticism over his pledge to ban new oil and gas developments in the north sea, and over his commitment to £28 billion extra borrowing for green investment.

But all this activity is going unnoticed by voters, resulting in stasis in headline polling numbers and in our qualitative research into voters' attitudes. Sunak is still deemed to be failing to live up to the challenges people are facing. Starmer is still viewed as something of an empty shell, but potentially the more palatable choice.

We also carried out research this month into two topics taking up a lot of time in Westminster and elsewhere. The first topic is housing, where voters were clear about the failures of the housing market, but unsure of the proposed remedies. The second topic is generative AI and taking its impact on education as a use case. Here voters were initially less familiar of the recent leap forward in AI products, but had clearer opinions of how, and how not, it should be used.

About

This analysis was produced by Global Counsel, drawing on three main qualitative and quantitative data sources:



FOCUS GROUPS WITH SWING VOTERS

Focus groups with undecided voters in two constituencies:

- 2019 Con voters, Filton & Bradley Stoke
- 2019 Con voters, Milton Keynes South

Both online focus groups were 90 minutes long and conducted by GC on 5th June 2023.



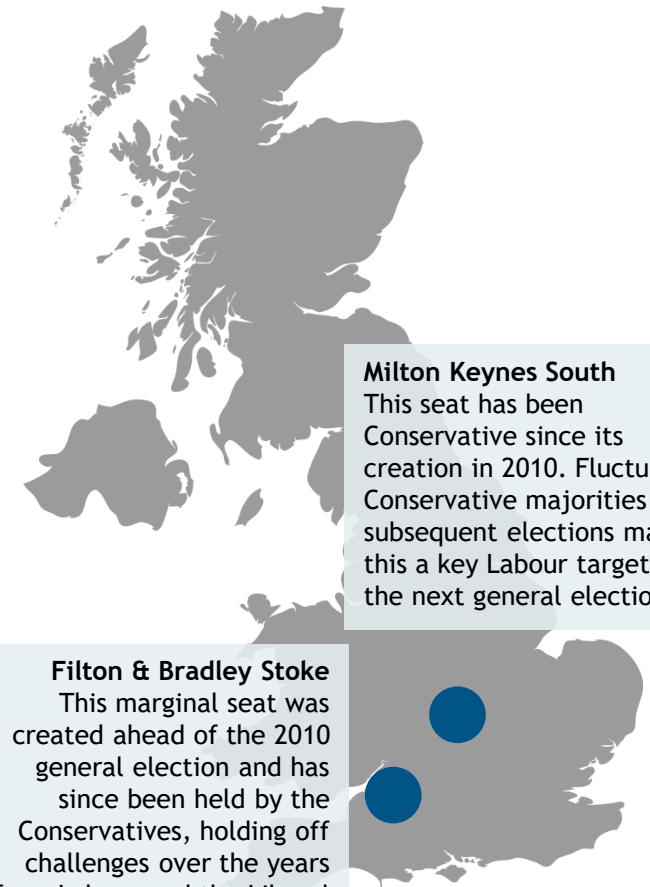
NATIONALLY-REPRESENTATIVE SURVEY OF THE PUBLIC

Online survey of 2,000 UK adults. Sample designed to be nationally-representative using quotas and weighting by age, gender, ethnicity, region, social grade, tenure and working status. Fieldwork was conducted between 2nd - 4th June 2023. Note that some totals may not add up to 100% due to rounding.



EXTERNAL PUBLIC OPINION POLLING

Analysis of published public opinion data from a variety of sources, including: Ipsos; Pollbase; Redfield and Wilton; YouGov.



Milton Keynes South

This seat has been Conservative since its creation in 2010. Fluctuating Conservative majorities in subsequent elections makes this a key Labour target for the next general election.

Filton & Bradley Stoke

This marginal seat was created ahead of the 2010 general election and has since been held by the Conservatives, holding off challenges over the years from Labour and the Liberal Democrats.

National mood and priorities

No change as the mood of the nation remains bleak. At 6 in 10, the proportion of the public that thinks the UK is heading in the wrong direction has been constant since the start of the year. Only a quarter (24%) believe the general economic condition of the UK will improve over the next 12 months. Undecided voters in focus groups struggle to identify any grounds for optimism.

While the cost of living continues to be the most prominent concern, a wide range of issues contribute to a sense of a country in crisis. Undecided voters in focus groups also regularly cite NHS waiting lists, public sector strikes, illegal immigration, food banks, deteriorating public spaces and increases in violent crime as evidence of decline. Overall, 76% agree that ‘things are worse now than they were in the past’, while 58% agree that ‘nothing in Britain works anymore’.

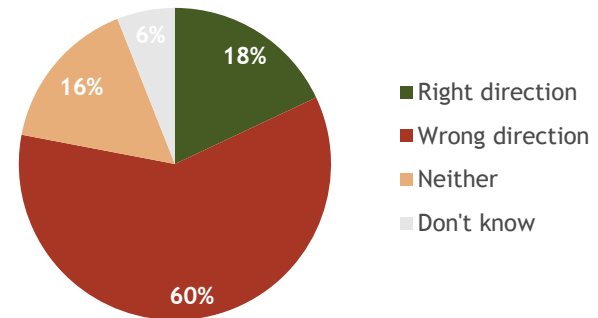
As well as resentment toward the political class, there is also criticism of businesses and those deemed to be cheating the system. Questions of profiteering remain - focus group voters ask why food, bills and other costs have not reduced in line with wholesale energy prices, why some costs are increasing above the official rate of inflation, and why businesses are able to announce record profits during a cost-of-living crisis.



There are so many issues - poverty, the lack of housing, immigration. People want wage increases because everything has gone up. The whole economy is absolutely awful at the moment and I can't see it getting better.

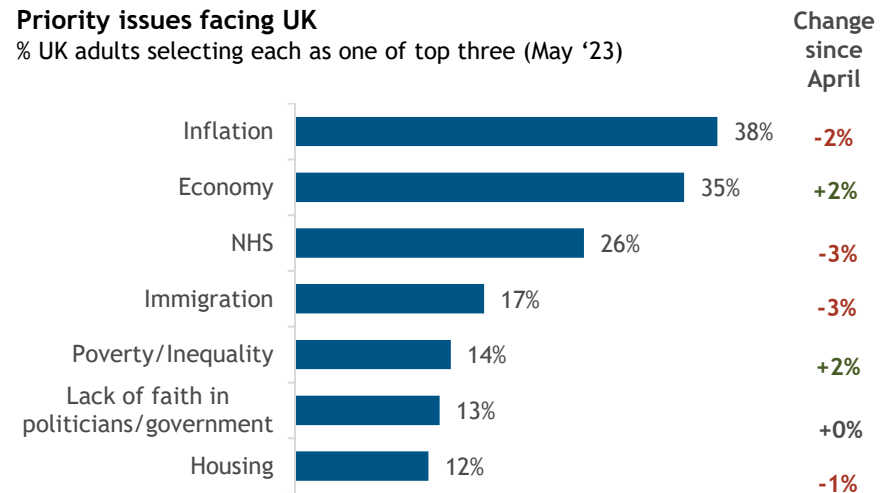
UNDECIDED VOTER, MILTON KEYNES SOUTH

Perceived direction of travel for the UK
% of UK adults selecting each option (May '23)



Priority issues facing UK

% UK adults selecting each as one of top three (May '23)



Sources: GC focus groups, [Ipsos](#), [Ipsos](#)

Government approval

There continues to be widespread dissatisfaction with government. Consistent with recent months, overall net government approval ratings ranged between -42% and -50% during May. While this represents an improvement on the low of -76% during the Truss premiership in October 2022, current ratings are very low by historical standards.

Dissatisfaction with government is largely driven by perceived failure to tackle the policy challenges facing the country. Polling shows that, while Rishi Sunak's five pledges are deemed to address the most important issues, very few believe his government is doing a good job in addressing them. Perceived underperformance is greatest in relation to easing the cost of living crisis (-42%), ensuring people get NHS care more quickly (-47%), reducing NHS waiting lists (-48%) and dealing with illegal migrants (-41%). A Labour government led by Keir Starmer is more widely deemed to be likely to do a good job in relation to each challenge, specifically on the NHS and public services. Labour is comparatively weaker on the economy and immigration.

Not all disapproval of government is policy-related. Undecided voters in focus groups also voice wider criticism of the Conservative Party, including in relation to perceived infighting, individuals deemed untrustworthy (notably Truss and Johnson), as well as Covid-related scandals (notably Partygate and PPE procurement).

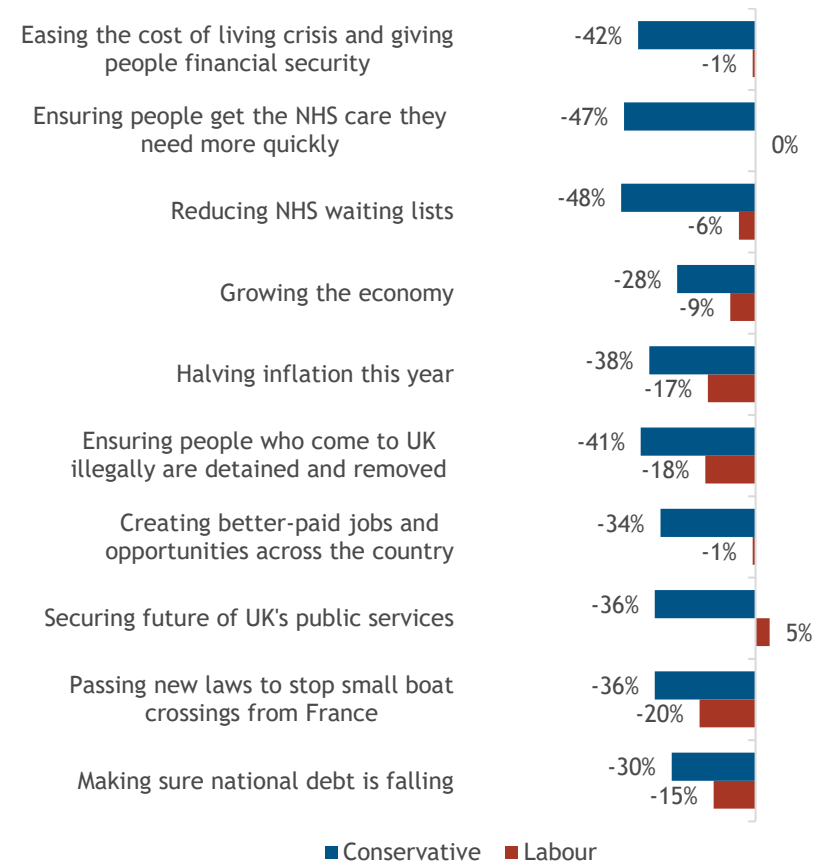


The Conservatives are untrustworthy. Rishi is the best of a bad lot. Truss turned the country upside down and single-handedly destroyed the economy and pushed mortgage rates through the roof. A lot of work needs to be done to build up public trust again.

UNDECIDED VOTER, MILTON KEYNES SOUTH

Perceived party competence against five pledges

Net % of UK adults believing each party is doing/would do a good job (May '23)



Sources: GC focus groups, [Ipsos](#), [YouGov](#), [YouGov](#)

Political preferences

Considering the dissatisfaction with the country and the government, it should be no surprise that Labour continues to enjoy a strong, consistent lead in voting intention polling. Labour's average poll lead across May was 17ppts, up slightly since April when its average lead was 15ppts. This is consistent with stable underlying data related to government satisfaction, preferred Prime Minister and economic optimism.

Though Sunak's personal ratings outperform his party's, they nonetheless lag behind Starmer's. Starmer had an 8ppt lead over Sunak in preferred Prime Minister polling in May, up slightly from 4ppt in April. While there are reservations about whether he is a 'strong' leader, Starmer is more widely believed to understand the problems facing the UK and to represent change. Undecided voters in focus groups criticise Sunak for not being 'visible' in recent months.

The 'time for a change' sentiment is widespread, despite limited enthusiasm for Labour. Focus groups with 2019 Conservative voters who are now undecided suggest that dissatisfaction with the government is so entrenched that voting Labour is considered by many to be the low-risk option. While there continues to be some criticism of a perceived lack of vision (in addition to lukewarm views of Starmer personally), the Labour Party is considered to be more credible since the change in leadership and there are few factors that actively repel voters.

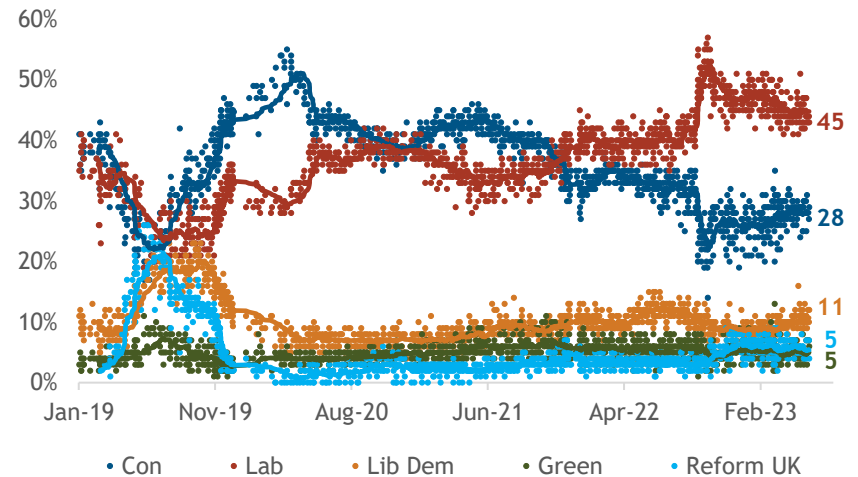


I have got to the point of feeling we need to give someone else a go. The Conservatives can't take us out this hole they have dug us into. It is far too deep. I'd have never dreamed of voting Labour at one point but I can see that is the only option at the moment.

UNDECIDED VOTER, MILTON KEYNES SOUTH

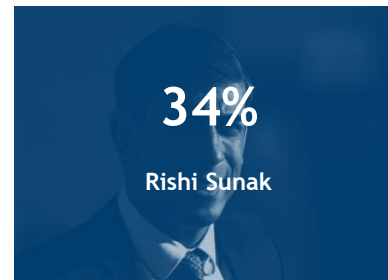
Voting intention

'Poll of Polls' aggregator (inc. monthly average for May)



Preferred Prime Minister

% of UK adults believing each to be the better PM (May '23)



Sources: GC focus groups, [Pollbase](#), [Redfield & Wilton](#)

Spotlight on: housing

Housing has increasingly become a prominent issue for voters, particularly the Labour base. While only 5% considered housing one of the top three issues facing the country in 2020, this has since risen to 12% in May 2023. For younger voters aged 18-24, it is the fourth most important issue (with 17% identifying it as a top concern), while it is the third most important issue for private renters (20%). Even among 2019 Conservative voters in focus groups, there are concerns about a lack of affordable housing, high rent and mortgage rates, and ugly, poor quality new-build developments.

While there is broad support for increasing the supply of homes in general, there is a strong aversion to building on greenfield sites. Around 6 in 10 support a large increase in housing in Britain, while a narrow majority even support a large increase in housebuilding in their local area. There is, though, significant opposition to building on green field sites - with focus groups suggesting this is strongly associated with the countryside and areas of natural beauty.

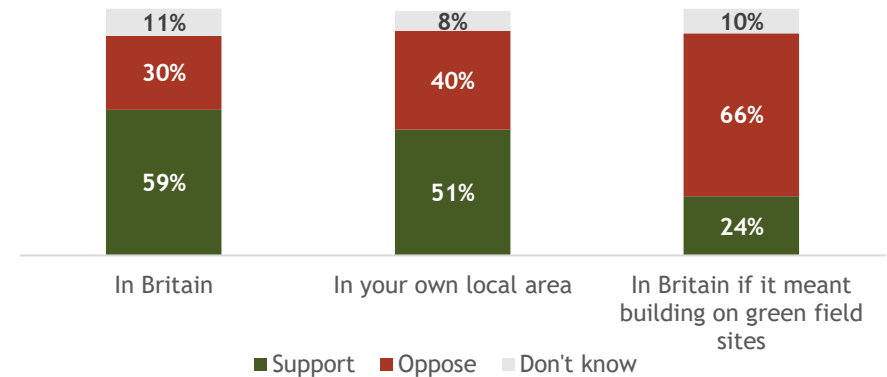
As with most other policy challenges, Labour is more widely considered to be able to tackle housing. Only 16% believe a Conservative government led by Rishi Sunak to be better at helping people on the housing ladder, compared to 33% who choose Labour under Starmer. Nevertheless, there is widespread scepticism of the ability of either main party to deliver: only 24% believe Labour would meet a target of 300,000 new homes a year and a mere 13% think the Conservatives would.



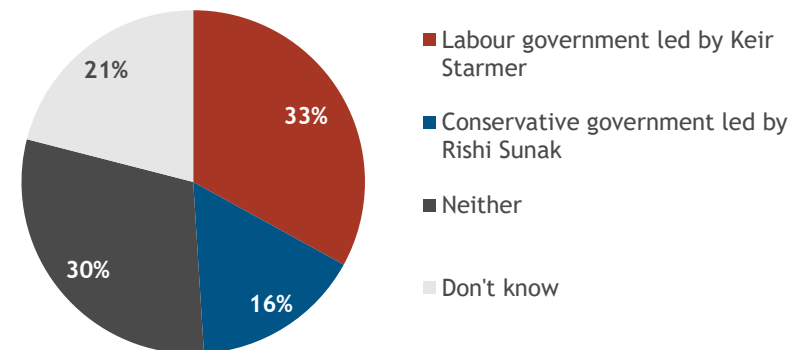
They need to build more housing - it needs to be built for purpose and not slung up overnight. Not everyone can afford to buy. Rental rates are so high, and we have generations who need somewhere to live and can't rely on living with their parents forever.

UNDECIDED VOTER, FILTON & BRADLEY STOKE

Support for large increase in amount of housing being built...
% of UK adults supporting or opposing in each circumstance (May '23)



Party deemed better at helping people on housing ladder
% of UK adults selecting each party (May '23)



Sources: GC focus groups, Ipsos, YouGov, YouGov

Spotlight on: use of generative AI in education

There is potential demand for regulation of generative AI technology (e.g. ChatGPT) in educational settings. Though only a minority are in favour of banning the technology altogether, there is a large majority in favour of some form of restriction on different use cases - ranging from generating exam questions to help students practice to providing students with feedback on assignments. A third (32%) of the public want to ban students using AI to draft homework.

The most prominent worries relate to the technology undermining students' cognitive development. Voters in focus groups expressed concern about 'dumbing down' of children's education - and the possibility of AI hindering students' learning and development is the most widespread concern (45% selecting as one of top three). Other prominent worries include it making it harder to assess students' real ability (40%) and being used to cheat or gain unfair advantage (39%). Only 12% of the public do not consider there to be any significant concerns in relation to the use of AI in education.

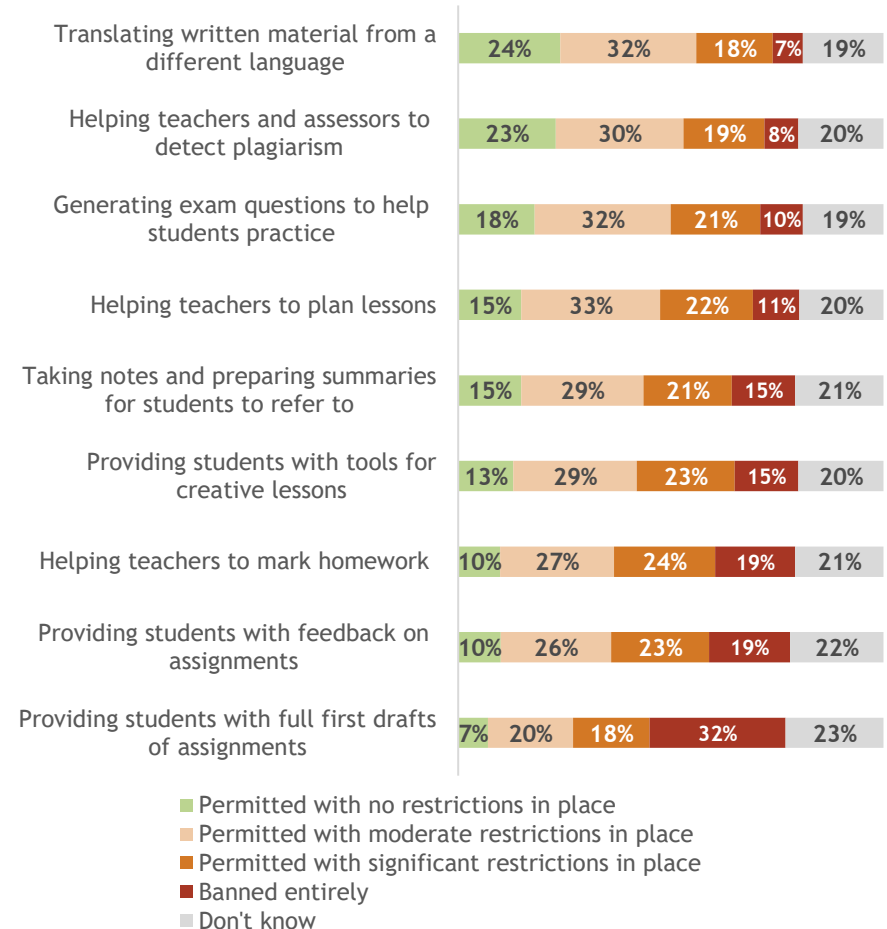
Potential benefits of the use of AI in education are less front-of-mind - and voters need persuading of the case for the technology. Voters in focus groups struggled to think of potential benefits spontaneously, though most did recognise certain advantages on prompting. Those that resonate most with the public include freeing up teachers to do more frontline work by reducing admin burdens (38% selecting as top benefit) and making extra tuition more accessible (30%).



I am worried this will homogenise everything. AI will surely always give the same answer. There will be no individuality and research won't be elevated. We need to make it work for us and not make us absolutely lazy.

UNDECIDED VOTER, MILTON KEYNES SOUTH

Attitudes to regulating different uses of AI in education
% of UK adults selecting each level of intervention (May '23)



Sources: GC focus groups, GC poll

Contacts



RAPHAEL MALEK

Head of Research and Insight
r.malek@global-counsel.com



ALEX DAWSON

Country Lead, UK
a.dawson@global-counsel.com



MEGAN STAGMAN

Associate Director, TMT
m.stagman@global-counsel.com



JOHNNY LUK

Senior Associate, UK P&P
j.luk@global-counsel.com



CONAN D'ARCY

Senior Practice Director, TMT
c.darcy@global-counsel.com

© Global Counsel 2023

Although Global Counsel makes every attempt to obtain information from sources that we believe to be reliable, we do not guarantee its accuracy, completeness or fairness. Unless we have good reason not to do so, Global Counsel has assumed without independent verification, the accuracy of all information available from official public sources. No representation, warranty or undertaking, express or implied, is or will be given by Global Counsel or its members, employees and/or agents as to or in relation to the accuracy, completeness or reliability of the information contained herein (or otherwise provided by Global Counsel) or as to the reasonableness of any assumption contained herein. Forecasts contained herein (or otherwise provided by Global Counsel) are provisional and subject to change. Nothing contained herein (or otherwise provided by Global Counsel) is, or shall be relied upon as, a promise or representation as to the past or future. Any case studies and examples herein (or otherwise provided by Global Counsel) are intended for illustrative purposes only. This information discusses general industry or sector trends, general market activity and other broad economic, market or political conditions. It is not research or investment advice. This document has been prepared solely for informational purposes and is not to be construed as a solicitation, invitation or an offer by Global Counsel or any of its members, employees or agents to buy or sell any securities or related financial instruments. No investment, divestment or other financial decisions or actions should be based on the information contained herein (or otherwise provided by Global Counsel). Global Counsel is not liable for any action undertaken or not undertaken on the basis of the information contained herein. No part of this material may be reproduced without Global Counsel's consent.