



More in  
Common

27 June 2023

# British Seven segments and the next general election

Luke Tryl

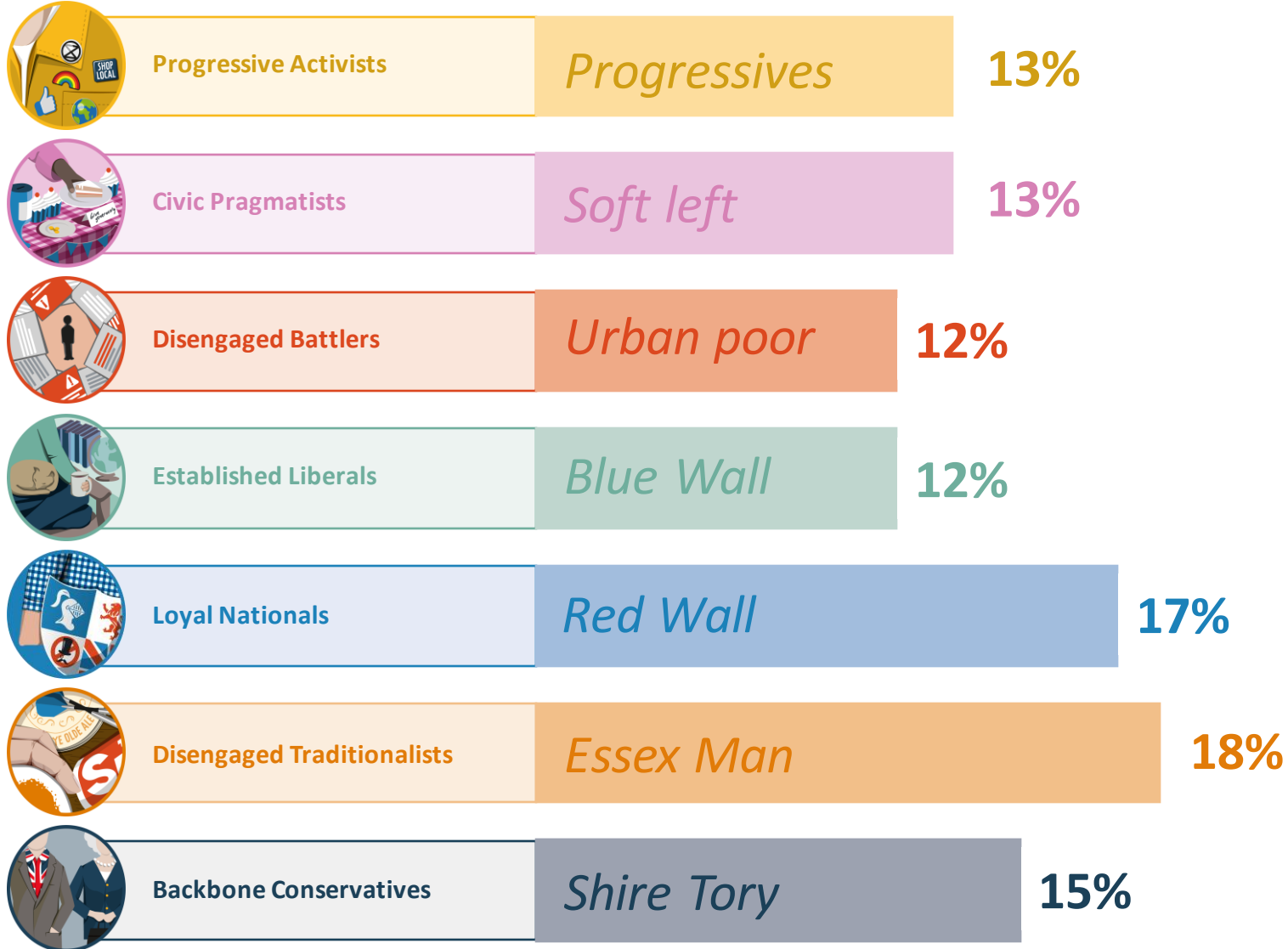




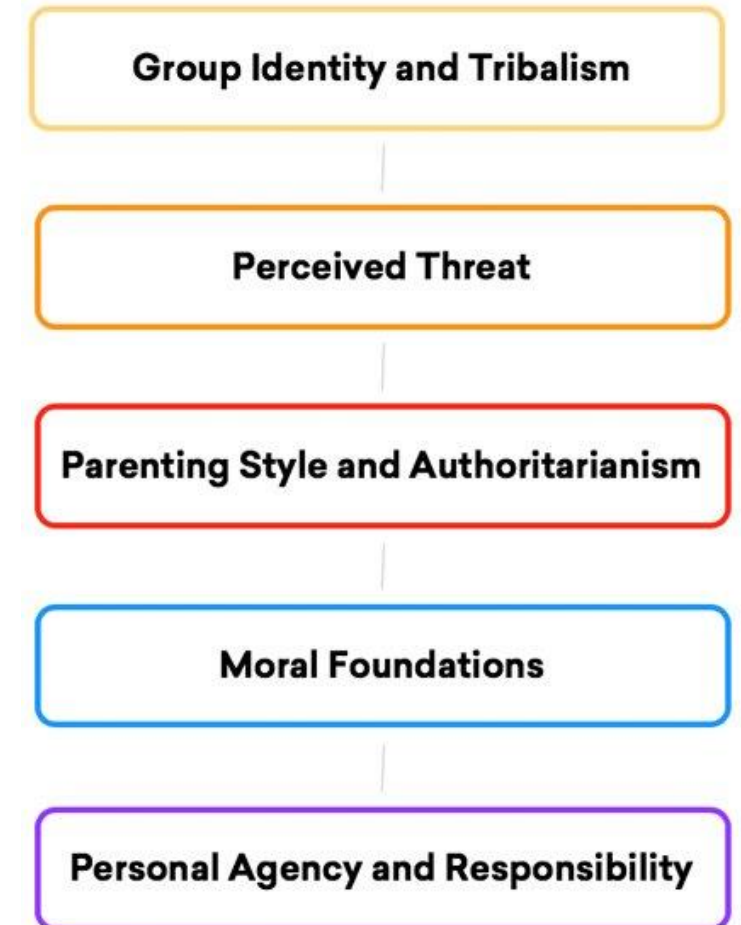
## **Section 1**

The British Seven segments and  
potential electoral coalitions

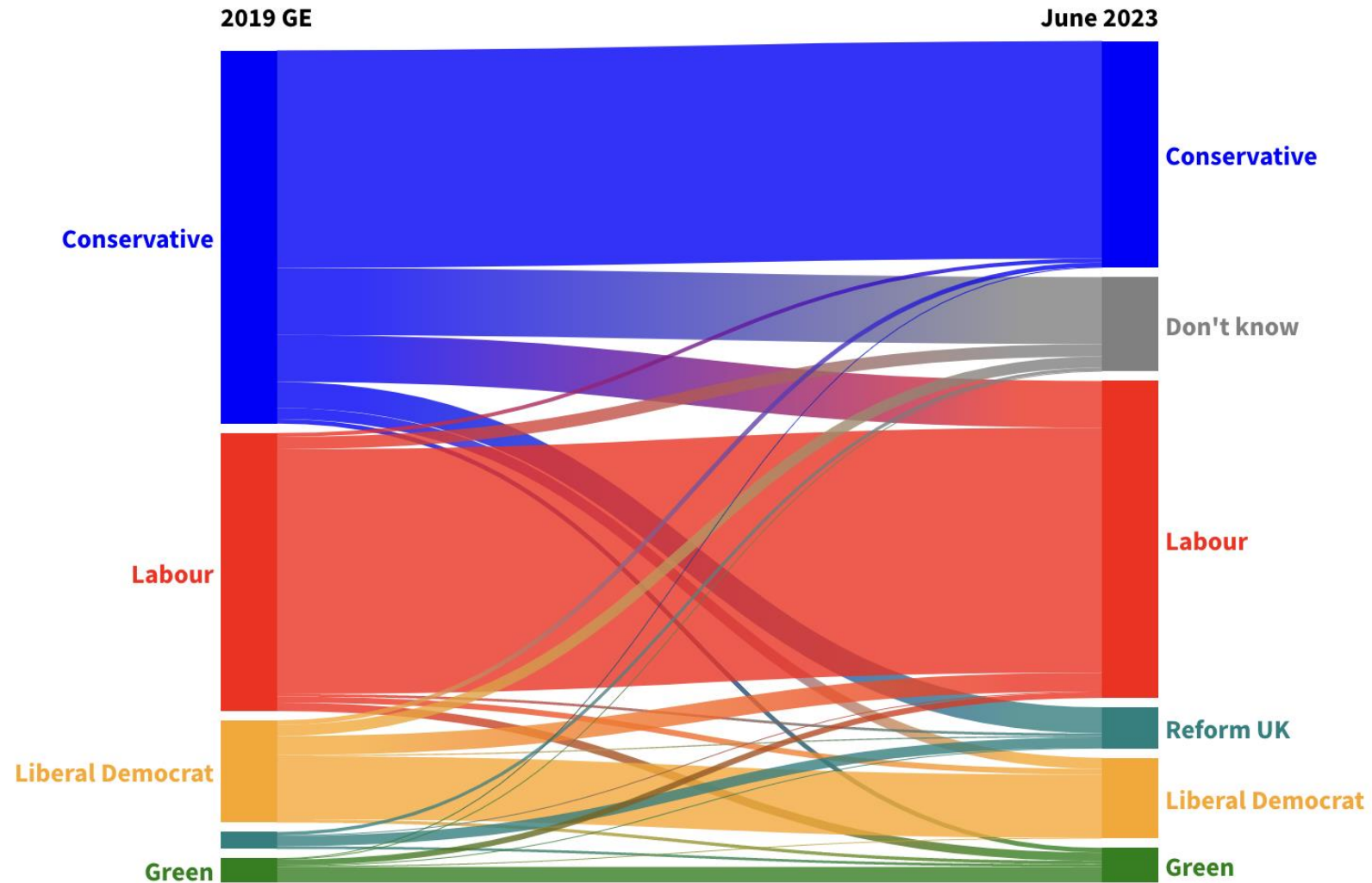
# The British Seven



## The segmentation inputs



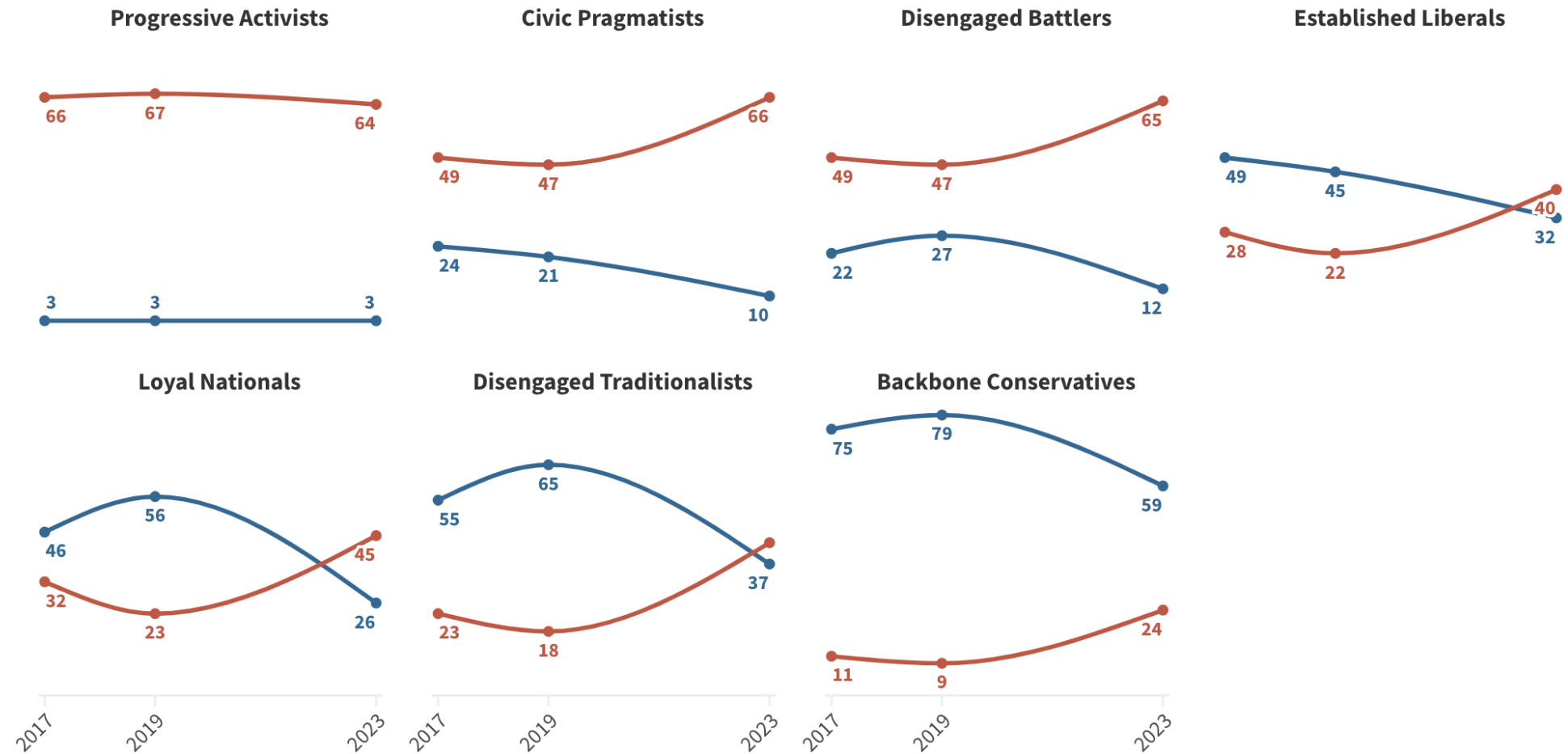
# How have voters changed since 2019?



# Changing voting intention (2017-2023) – by segment

Labour now holds the voting intention lead in six out of seven segments

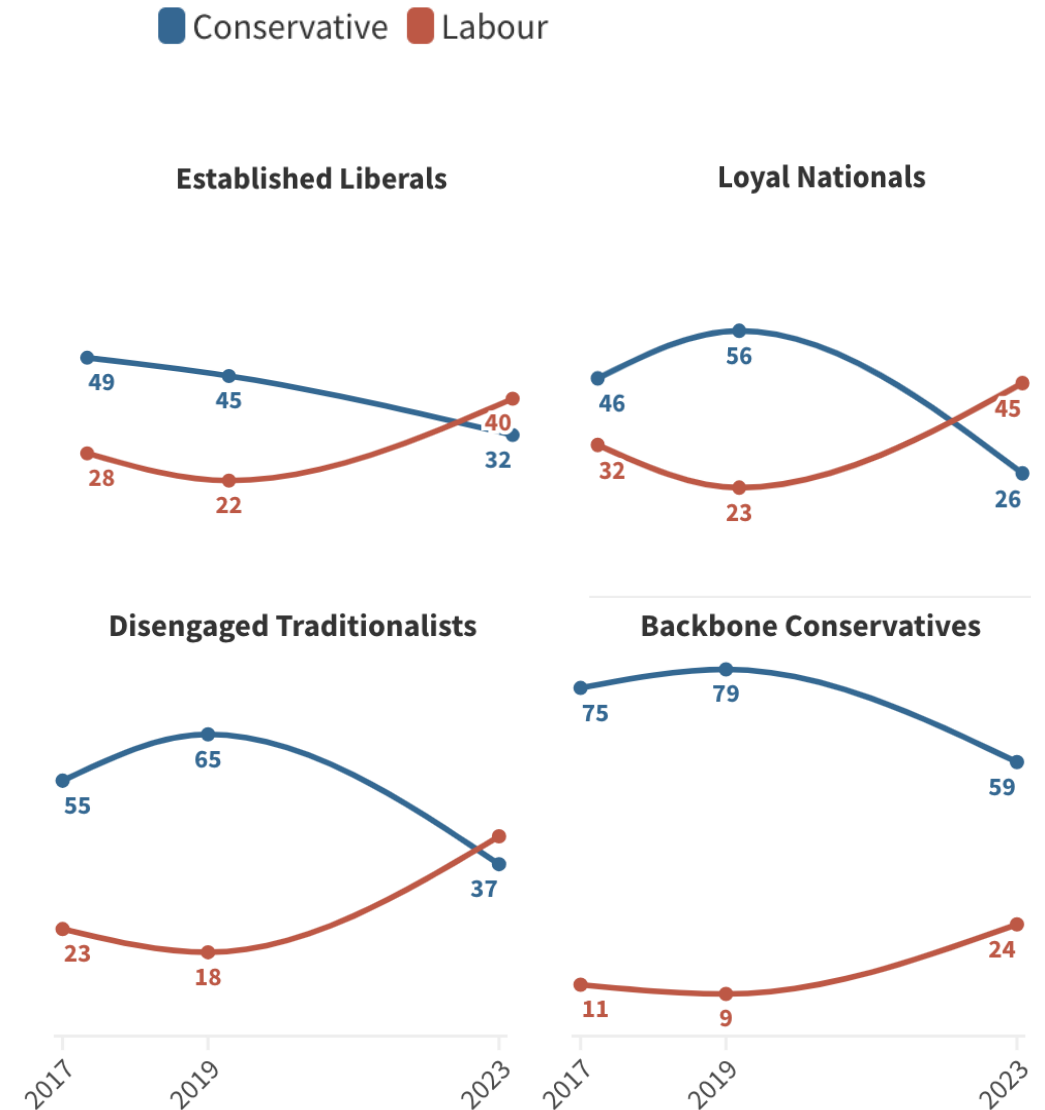
■ Conservative ■ Labour



# The potential Conservative coalition

## Resuscitating the 2019 coalition

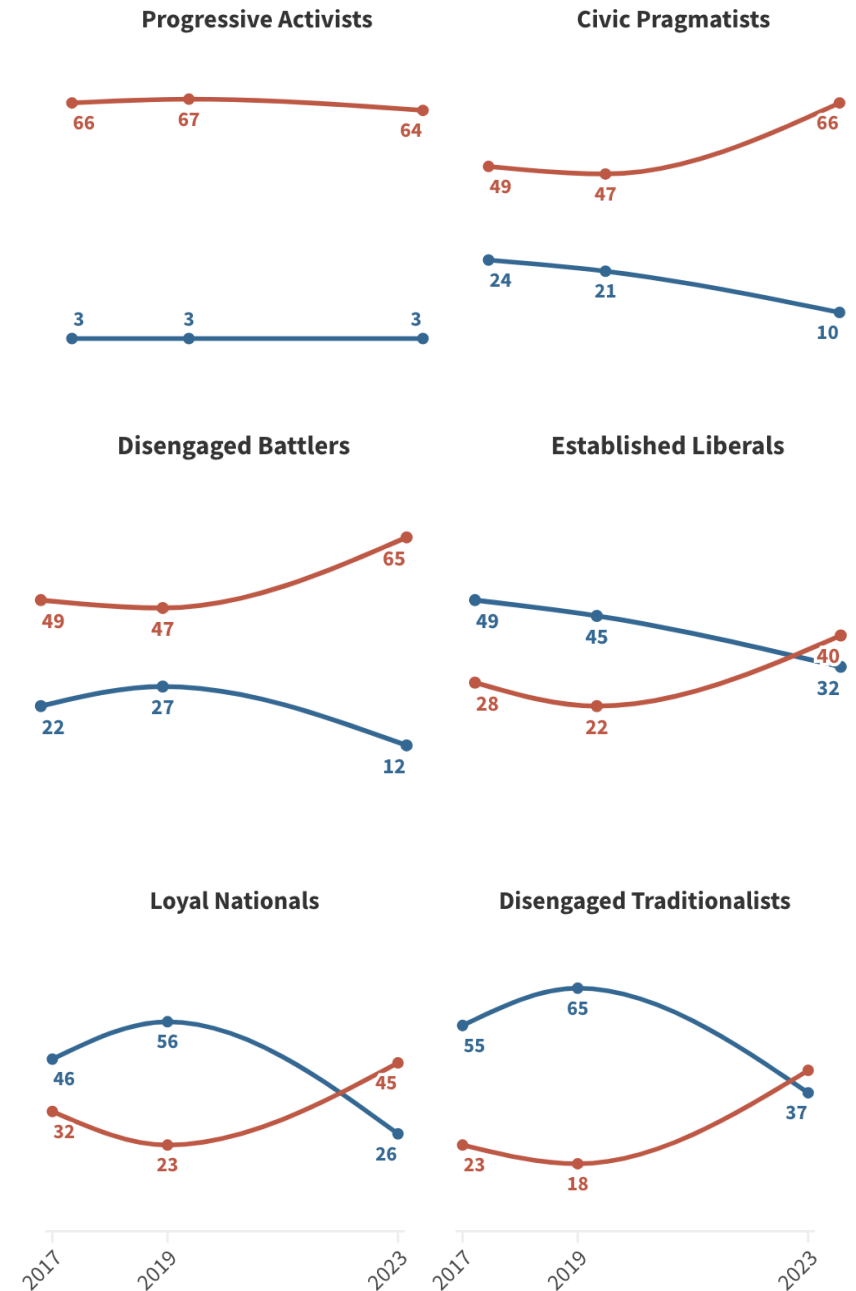
- Our polling shows that it is increasingly difficult to hold the 2019 Conservative coalition together.
- The main forces that brought together the 2019 coalition – Brexit, Boris and Corbyn – are now gone from British politics
- As Brexit identities wane and cost of living started to bite, economics has reasserted itself as the key political frame.
- This is particularly a problem because the two wings of the Coalition - Loyal National (typical Red Wall voters) and Established Liberals (typical Blue Wall voters) have often quite opposed views on economics
- Sunak maintains more support among the Established Liberals than Loyal Nationals.
- The loss of trust during Partygate continues to hurt the Tory brand for why they won't vote Tory again
- There is a growing 'time for change' 'what can we lose' narrative emerging in focus groups



# The potential Labour coalition

## *A broader based coalition*

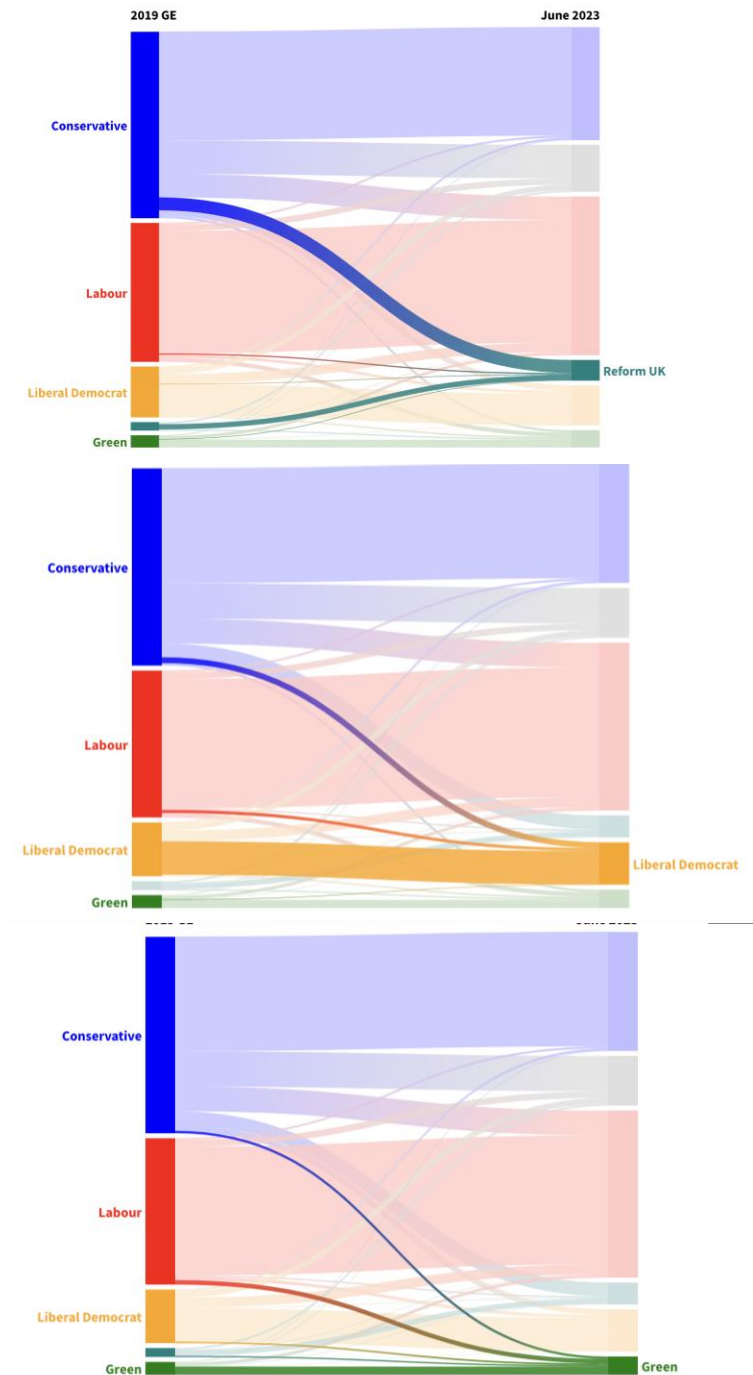
- Unlike the narrower potential Conservative coalition, Labour lead in voting intention with 6/7 segments – though only marginally with ELs and DTs.
- More Civic Pragmatists and Disengaged Battlers now intending to vote Labour than Progressive Activists – Labour making gains outside their highly engaged base
- Labour has made a real recovery with the typical Red Wall voter (Loyal Nationals) who have largely swung back to Labour after swinging massively to the Tories in 2019.
- The current polling means Labour look set to benefit from a uniform vote swing, rather than a proportional swing.
- The larger challenge facing Labour is the 'will they be any different/better' than the current government – while this mightn't influence the final result, it is likely to influence how a future labour government governs.





# Where are the smaller parties?

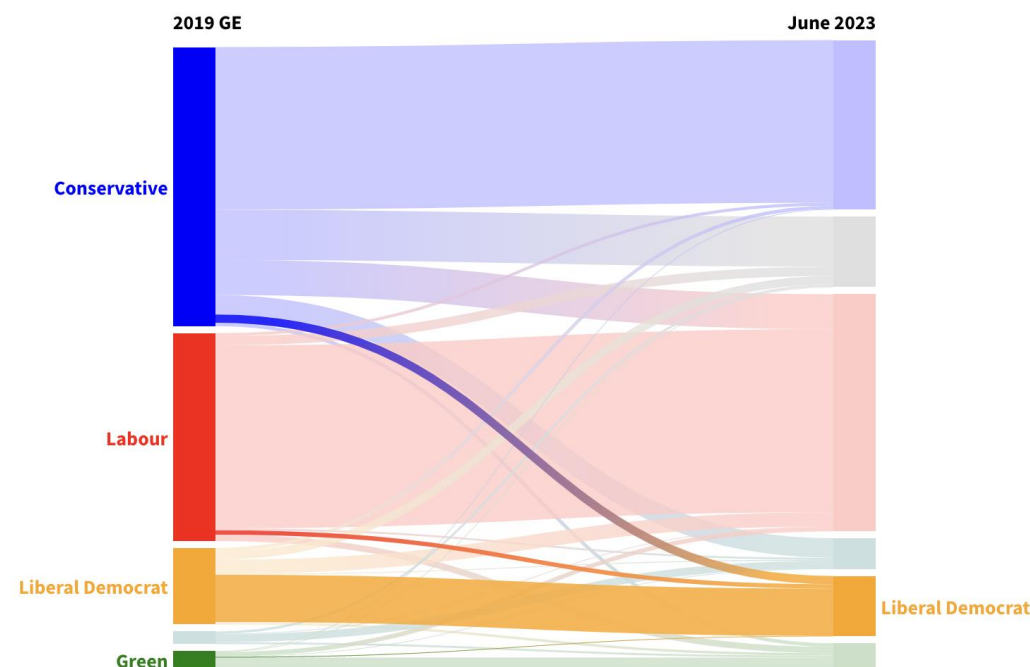
- **Our most recent voting intention polling puts the smaller parties on:**
  - Liberal Democrats: 10% (-3 from May 2023)
  - Greens: 4% (-1 from May 2023)
  - Reform UK: 6% (+1 from May 2023)
- When looked at through the lens of the segments – we see interesting dynamics emerging over who is voting for the smaller parties.
- **11% of Progressive Activists would vote Green** – they make up around 27% of would-be Green voters – but two in five Green voters are either an Established Liberal or a Loyal National.
- **12% of Loyal Nationals would vote for Reform UK** - Loyal Nationals make up 43% of would-be Reform UK voters. However potential upside for Reform with these voters is much higher if they had the right package.
- **2019 SNP voters increasingly split** – Desire for independence has taken a backburner with some to sorting out 'broken Scotland'. Greater pull to vote labour to stop the Tories.





# The Lib Dem Opportunity

- While the Lib Dems are on 10% overall – they are overperforming with two segments in particular: Established Liberals and Civic Pragmatists
- That lower vote share appears to be more efficiently distributed. In the seats where the Liberal Democrats are the main challenger people have a view, where they are not they don't feature at all in focus groups. There is far less need for a formal 'progressive alliance' than some assume.
- In focus groups those who voted Liberal Democrat in Tory heartlands tell us they haven't made up their mind about how they will vote in the General Election. The local election vote was a wakeup call, and they want to see if the Tories listen.
- 2010-2015 Coalition rarely comes up, where it does impact of the Liberal Democrats more negative "When we had the coalition, oh what's his face? I can't remember his name now. Mr. Facebook, he was walking around puffed out chest and like, oh let's do this with these little tiny wins and was just, I found it just irritating"

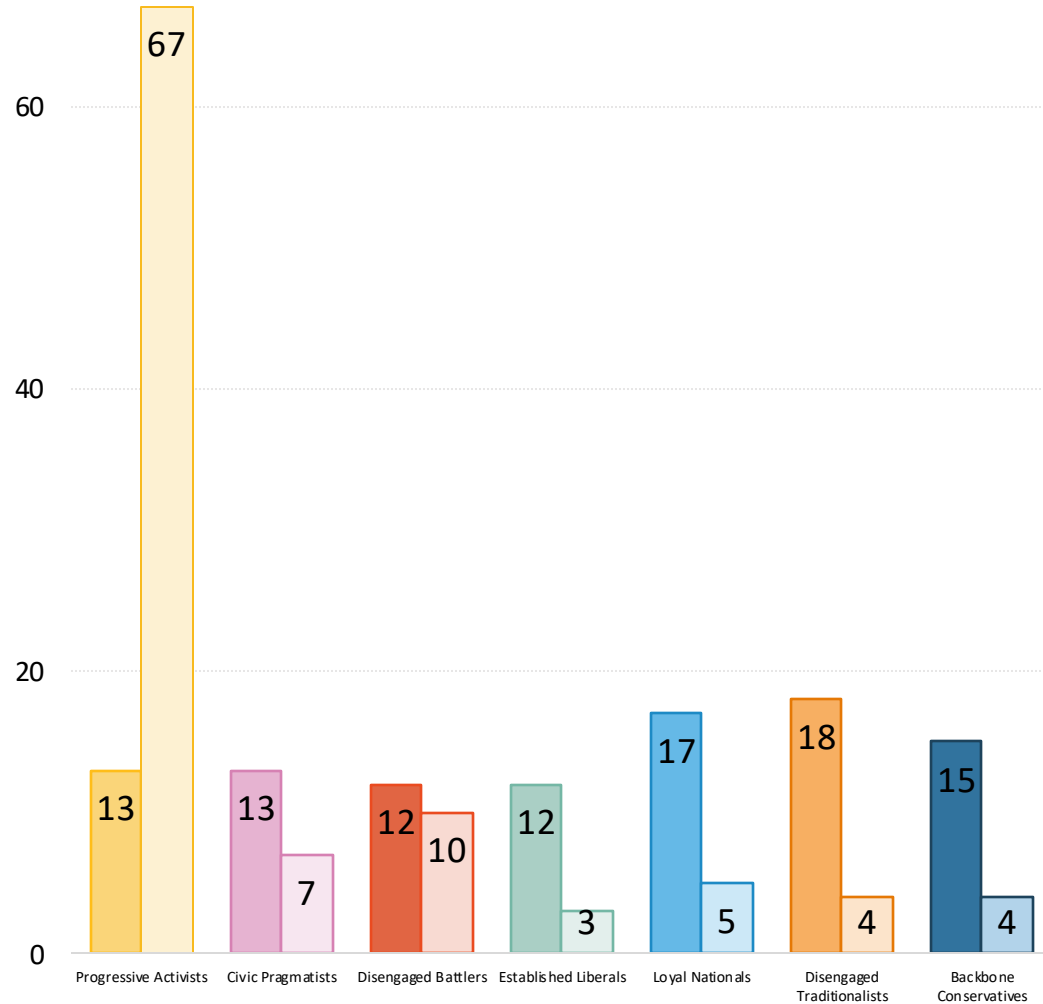


# Who are the door-knockers and canvassers?

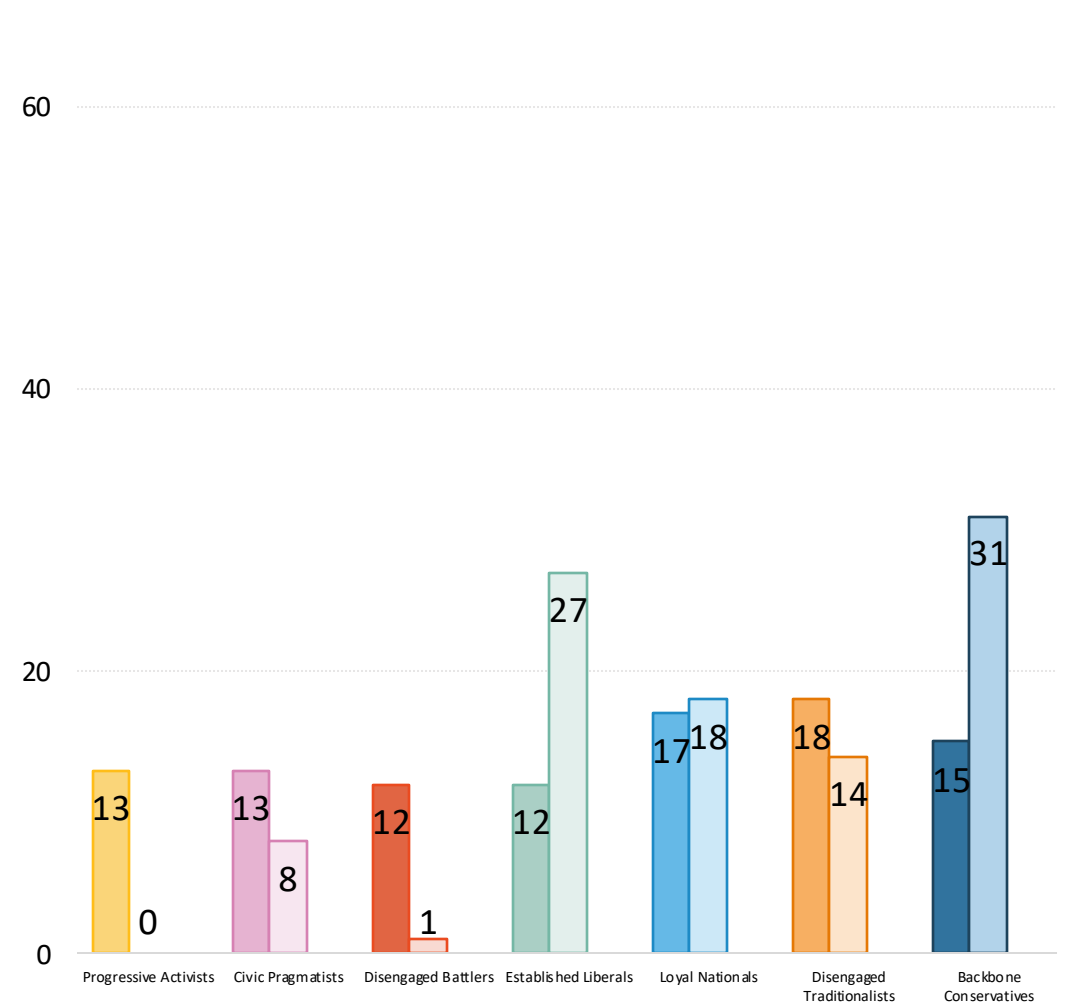


While the vast majority (67 per cent) of Labour members come from the Progressive Activists segment, Conservative Party membership is more evenly spread coming mainly from the Backbone Conservative and Established Liberal segments.

### Labour Party Membership – by segment



### Conservative Party Membership – by segment



February 2020



= National Average

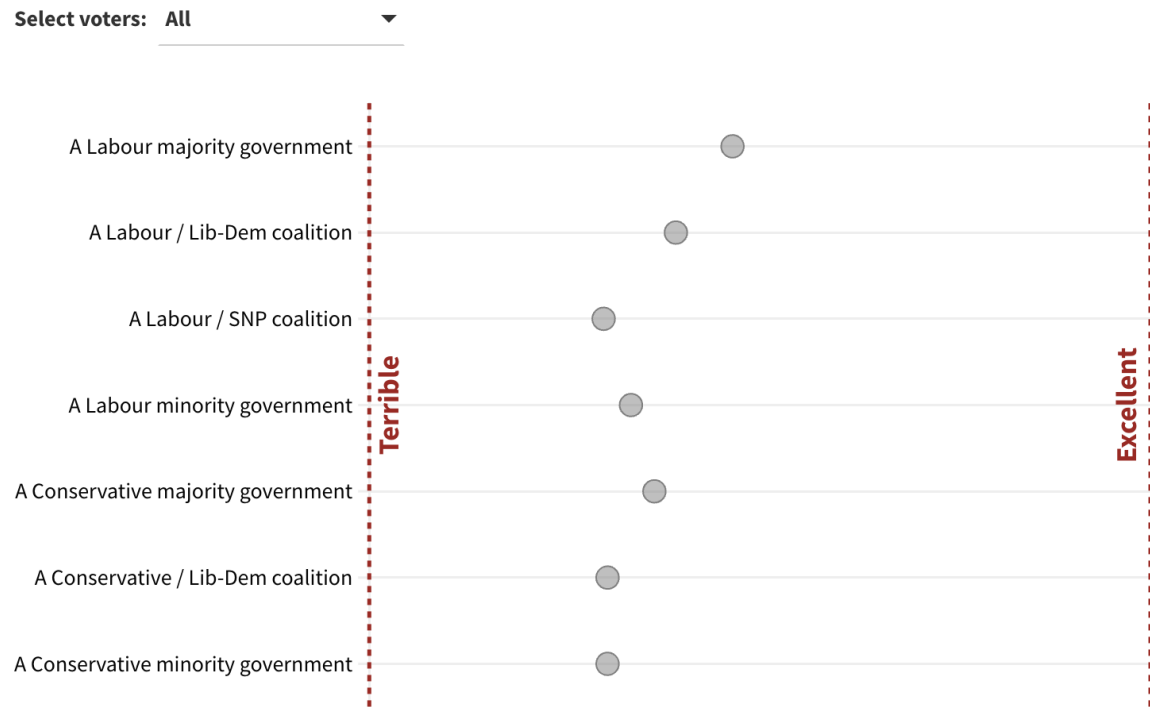


= Party Membership Average

# Public are fairly relaxed about various coalitions

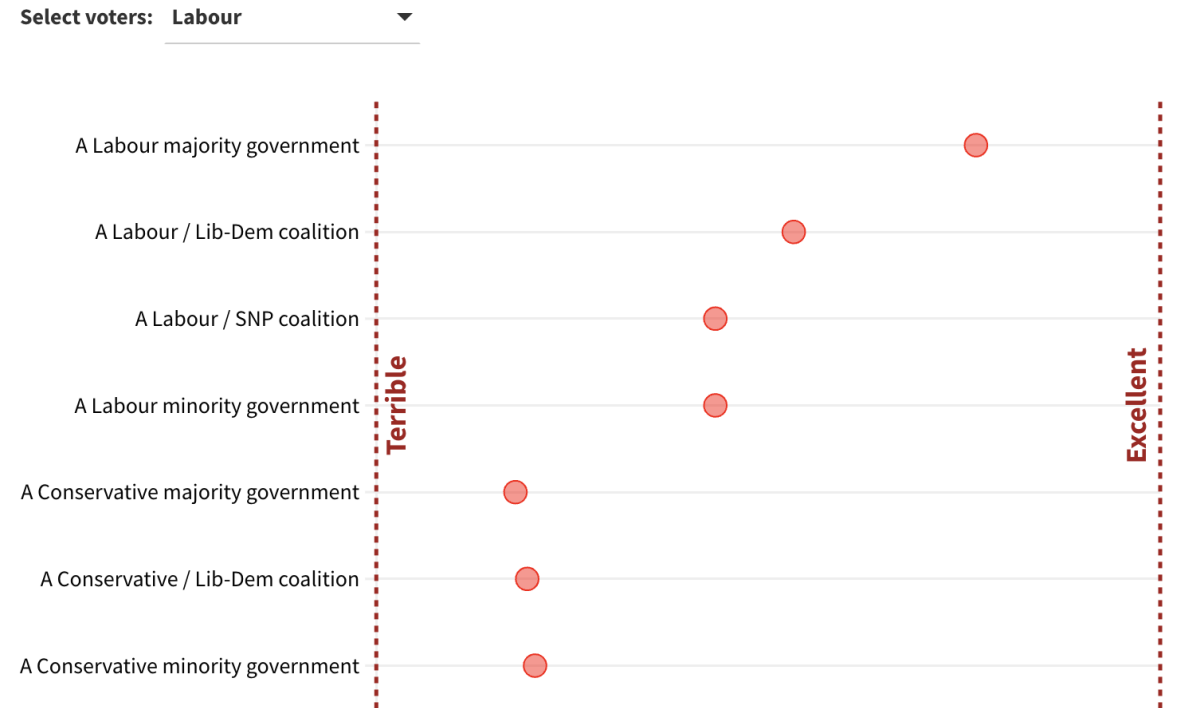
Both the public generally and Labour voters specifically are relaxed about the various potential coalition options after the next general election

The following are a set of possible outcomes for the next general election. On a scale of 1-5, where 1 is terrible and 5 is excellent, please rate how good or bad you think the outcome would be for the country.



A Flourish scatter chart

The following are a set of possible outcomes for the next general election. On a scale of 1-5, where 1 is terrible and 5 is excellent, please rate how good or bad you think the outcome would be for the country.



A Flourish scatter chart



## **Section 2**

What is shaping the coalitions?

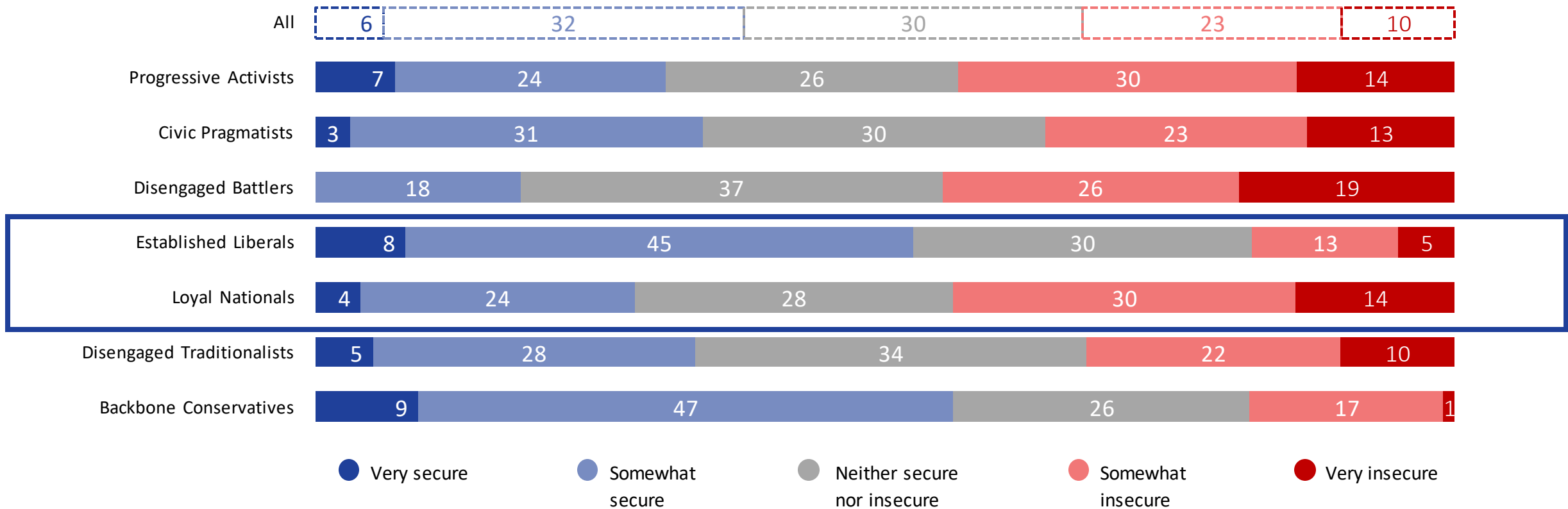


# The driving force of insecurity



Major gap between Loyal Nationals (Red Wall) and Established Liberals (Blue Wall) on feelings of security about the future. This helps to explain why having a 'more competent' PM has brought some Established Liberals back, while Loyal Nationals want to see material change.

To what extent do you feel secure about your future?

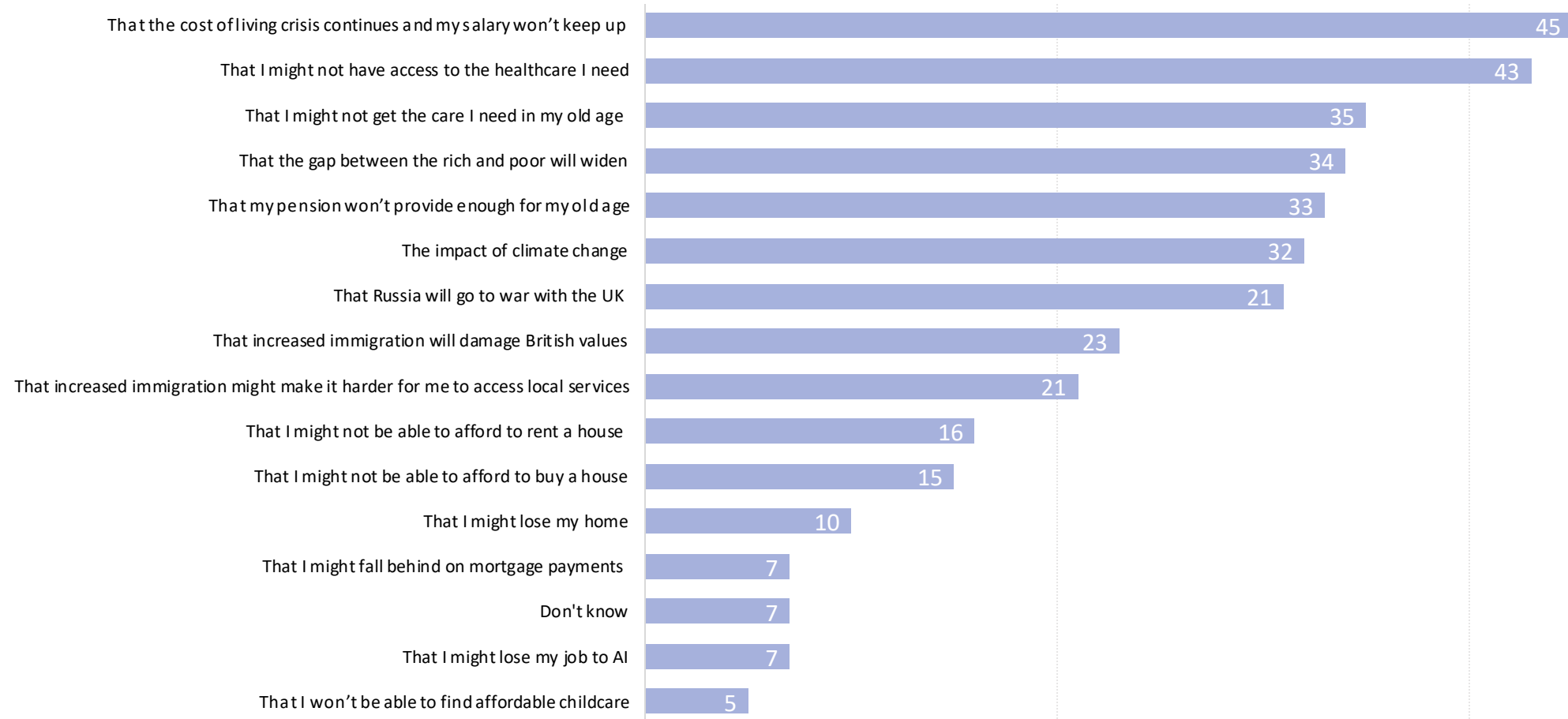


# Why does Britain feel so insecure about the future?



The public's insecurity mirrors the top issues being driven by the cost of living crisis, pressures on the NHS and elderly care

## Which of the following, if any, make you feel less secure about your future?



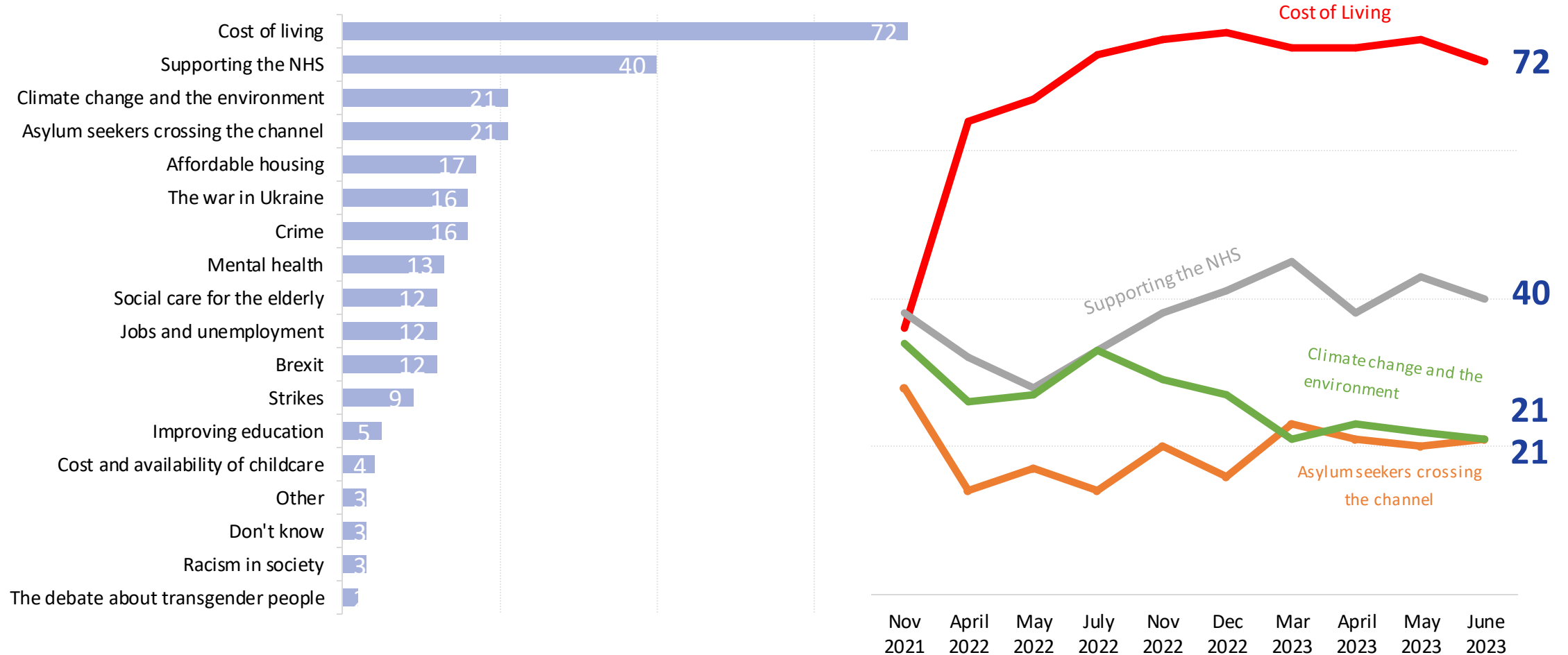


# Britons' top issues



Cost of living is the overwhelming top issue. The NHS has been a growing concern for the past year. Asylum seekers and climate change compete for third place. Crime is rising up the agenda.

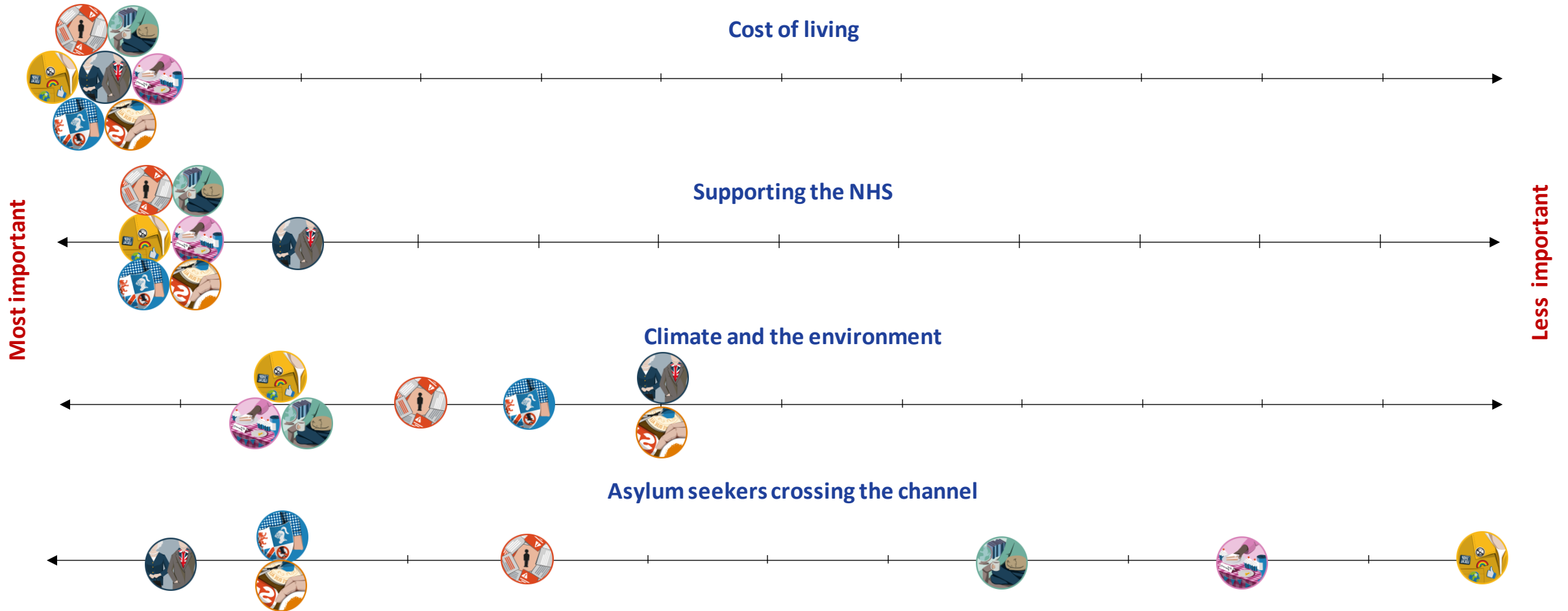
In your opinion, which are the most IMPORTANT issues facing the country today? Select the top 3



# Top issues by segment – June 2023



While every segment agrees that cost of living and supporting the NHS are top issues for the country, there is also strong agreement that the environment is important, compared to asylum which is more divisive.





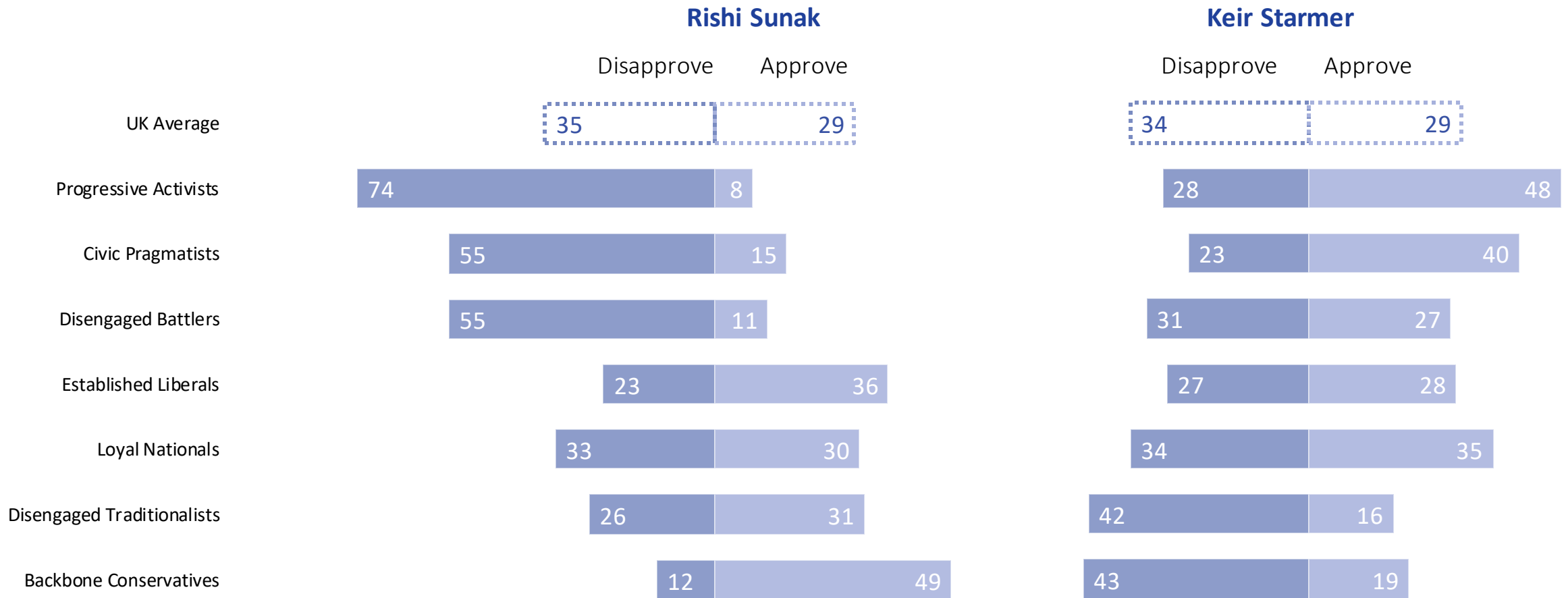
## **Section 3**

Views on party leaders and their  
pledges/missions

# Leader approval ratings – similar but different patterns



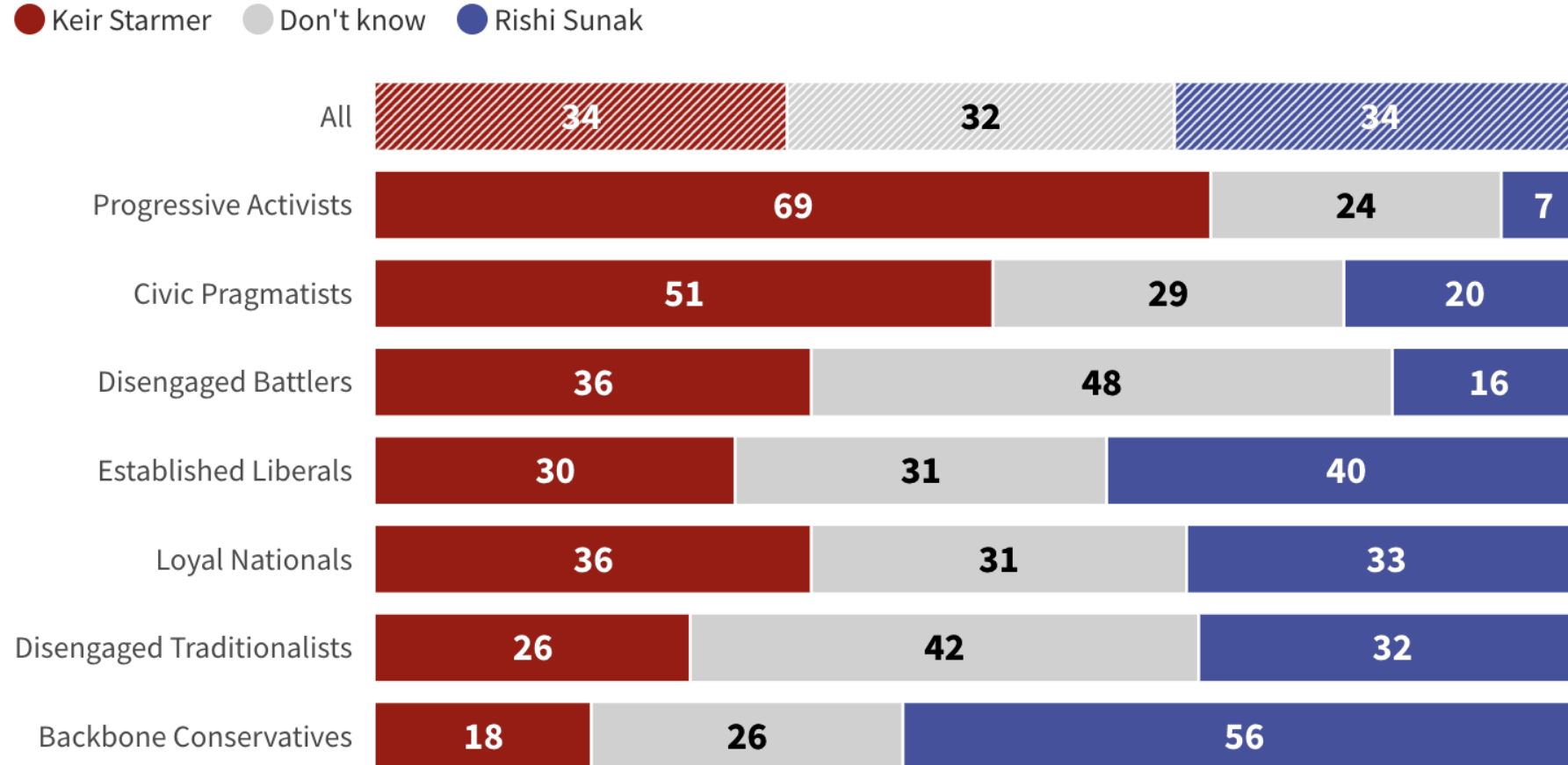
The overall approval ratings of Keir Starmer and Rishi Sunak are nearly identical, but the patterns are different. Rishi Sunak is more polarising than Keir Starmer.



# Who would you rather as PM?



The overall preference on the leaders is quite similar – with Keir Starmer leading with typical Red Wall voters and Rishi Sunak leading with typical blue wall voters



# Focus Groups on...Rishi Sunak



## Several threads run through our recent focus group testing on Rishi Sunak:

- Gets credit for his competent delivery so far and being better than his predecessors. The public want to give him a chance.
- Biggest plus from the public is for his job as Chancellor on furlough.
- 5 pledges resonate better in groups than missions. But the focus on AI does not.
- Main negative is being seen as out of touch and wealth gaffes (and heated swimming pool) cutting through.
- Growing perception that he is not strong enough to stand up to Boris Johnson, and questions about strength generally
- Culture war lines don't come across as authentic to the public
- Generally warmer reception in Blue Wall groups than Red Wall groups. Risk of falling between two stools

# Focus Groups on...Keir Starmer



## Several threads run through our recent focus group testing on Keir Starmer:

- There has been an improvement on his focus group testing over the last two years and an increase in name-recognition and cut through – with hostility disappearing.
- ‘Not Corbyn’ is usually the main positive – the attack that he campaigned for Corbyn in two elections hasn’t come up unprompted in any focus group.
- But questions about what he stands for – not because of leadership election U- turns – but because of the narrative Johnson set out that they he is good at opposing/criticizing the government but doesn't have anything positive to say.
- They want to hear how Keir will make things better. They want a pledge card style series of tangible improvements not a soaring vision.
- Bold stances even where not universally popular (i.e. house building) will burnish his credentials.



# The Prime Minister's Five Priorities



5

## Public's overall view on the five pledges

The five pledges have cut through and are fairly retail. The pledges are landing more successfully than Starmer's missions, but risk that the regular repetition of the five pledges repetition begins to look evasive. Any U-turn or failure will be met with real anger and frustration.



### Halving Inflation

Inflation is the top public priority but only a minority understand the PM's pledge to halve inflation, and are worried that it might only mean things get 'less worse' than 'actually better'



### Grow the economy

The 2019 Tory coalition supports growth over redistribution – but red wall voters are more divided. Public want and expect green tech, high tech, food and pharma to grow in the coming years



### Cut the waiting lists

Waiting lists are a major driver of broader feelings of insecurity. Everyone has an NHS failure story – openness to reform increasing, though continuing sympathy for doctors and nurses.



### Debt Failing

The public think we should be reducing our national debt but prefer spending cuts over tax rises to reduce debt



### Stop the boats

Public support the intention of stopping the boats (think current situation is chaotic), but don't think the Rwanda policy will work to reduce numbers. Support exemptions for many groups including women and children, people fleeing conflict and 'genuine refugees'

# Keir Starmer's Five Missions



5

## Public's overall view on the five missions

While the aims of the missions broadly resonate with the public, the missions themselves remain too abstract and lack a retail offer that the public can get behind. There is broad disillusionment with politics and little faith that Labour would do better. The retail offerings will also help dispel the perception that Labour is good at opposing, but not much else.



## Highest sustained growth in the G7

The public are evenly split over prioritising growth or redistribution. The G7 framing doesn't resonate with the public - what does that mean for me.



## Britain – clean energy superpower

'Why not Britain?' is a strong framing and Putin's war in Ukraine has made people more supportive of clean energy – but focus needed on how different areas benefit and not just funding envelopes



## NHS – fit for the future

Everyone has an NHS failure story and there is increasing openness to radical NHS reform among the public. Sympathy for doctors and nurses remains.



## Britain's streets safe

This mission resonates strongly with voters – particularly in Red Wall. For it to be successful, it needs to tackle anti-social behaviour and focus on the 'clean up' post anti-social behaviour.



## Break down barriers to opportunity

This mission needs to be much more tangible to resonate with the public – opportunity for Labour to set out its stall on childcare, education and levelling up





## **Section 4**

The issues on the ballot

# Britons' top issues...in one sentence



## Cost of living

Consistently top of mind and public expect crisis to last until after next election



## NHS and waiting lists

Everyone has an 'NHS story', despite strong support for NHS, growing openness to reform



## Crime and anti-social behaviour

Key indicator for how people think about their community – clean up and in person response important



## Climate/environment

Strong consensus but need to make the climate agenda more practical – how will it benefit me?



## Small boats

Control and compassion – more think Rwanda worth trying (though not majority), but most think it won't work



## Housing

Rising concern – public support more nuanced than NIMBY-YIMBY divide, most people are in quiet majority



## Levelling Up

Major risk for faith in politics for rowing back on the promises of levelling up – people want tangible hyper-local change



## Trans and gender identity

Low salience. Public's starting point is kindness – but concerns about sports and kids.



## Ukraine

Consistent support for doing all that it takes to support Ukraine and help them win. Pride in Homes for Ukraine.



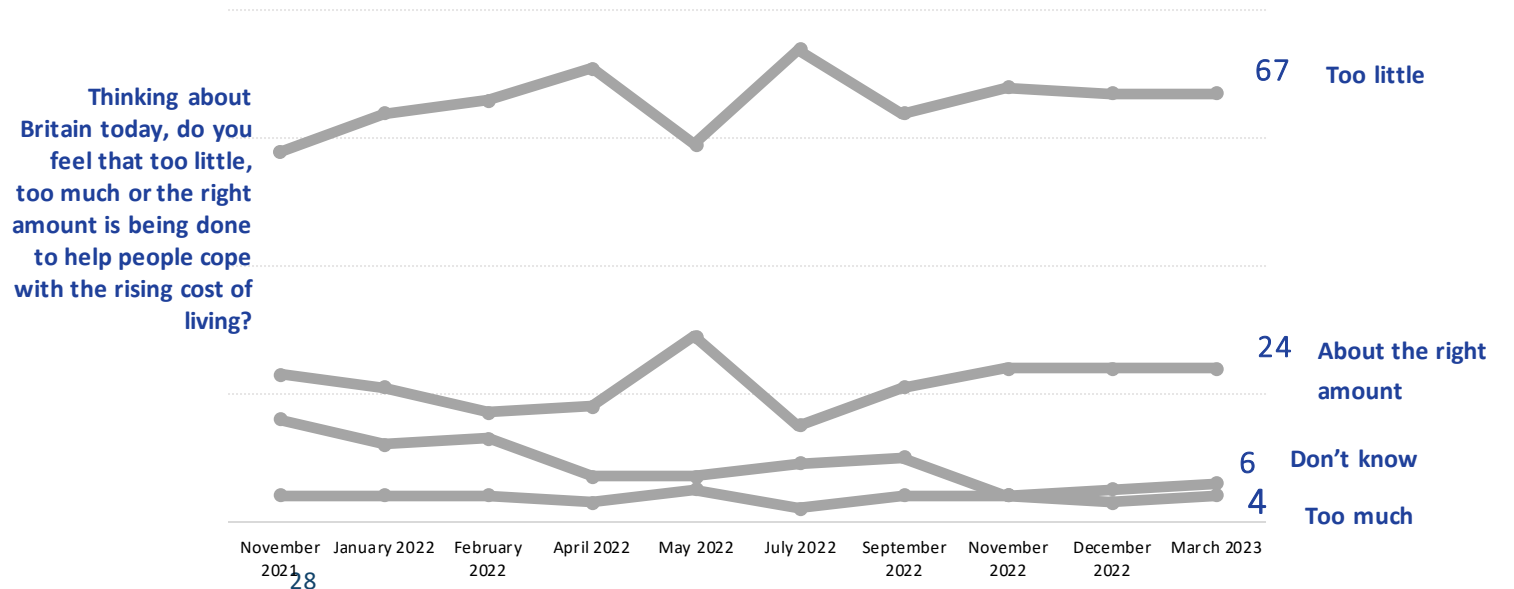
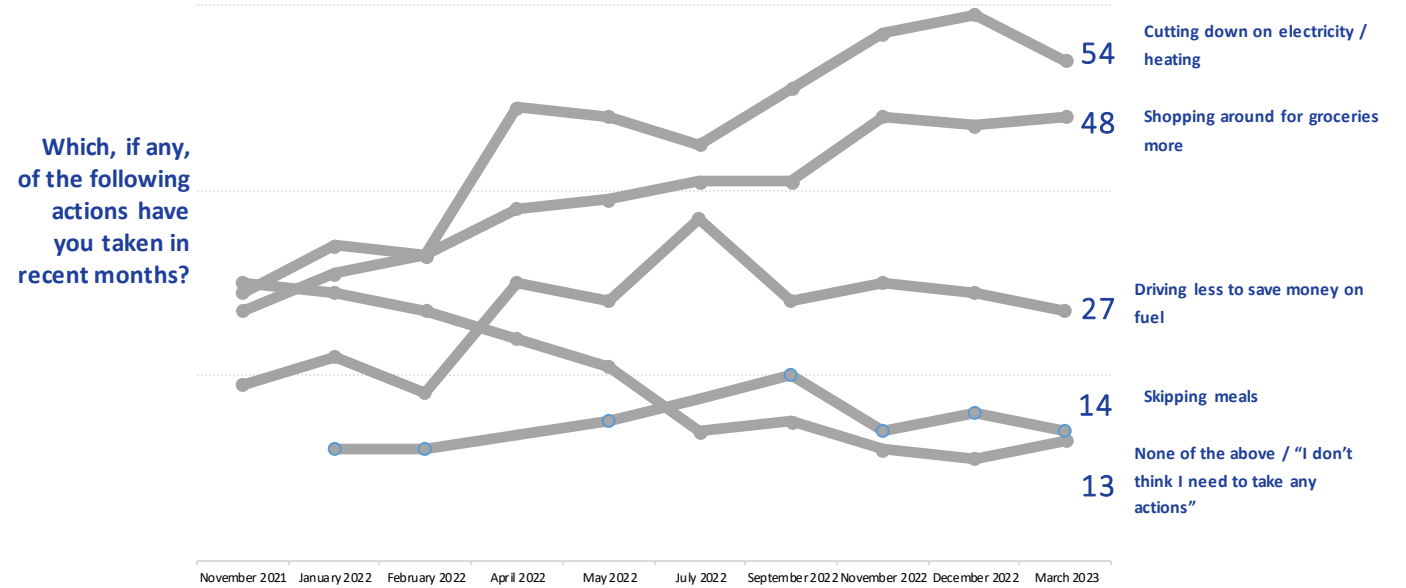
## Brexit

Brexit less important identity now. Rejoin would win if referendum today, but country split on another vote.

# Issue: Cost of living



- **Cost of living continues to be the biggest issue facing the country** and top of mind for all voters – concern has stayed at more than 70% for more than a year.
- **March 2023 was the first month when fewer individuals were having to make cost of living cuts**
- **Two thirds of the public have consistently said that the government was doing ‘too little’ on the cost of living** – large government spending commitment only momentarily shifted the bar.
- Even among those who aren't choosing 'heating or eating' there is a sense they've had to give up on things that make life good life.
- Most expect crisis to last years, not months

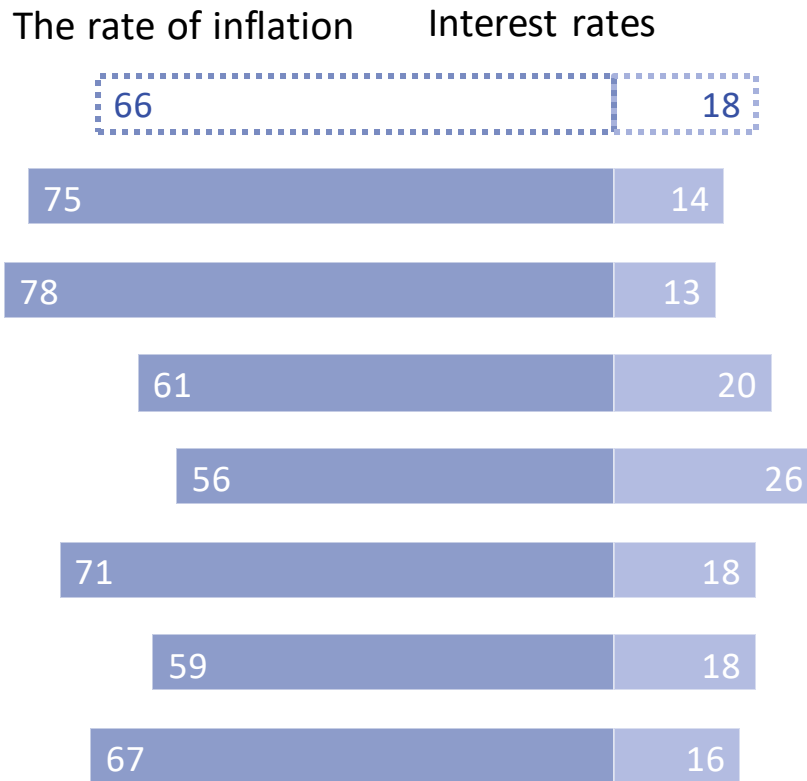


# Cost of living: inflation versus interest rates

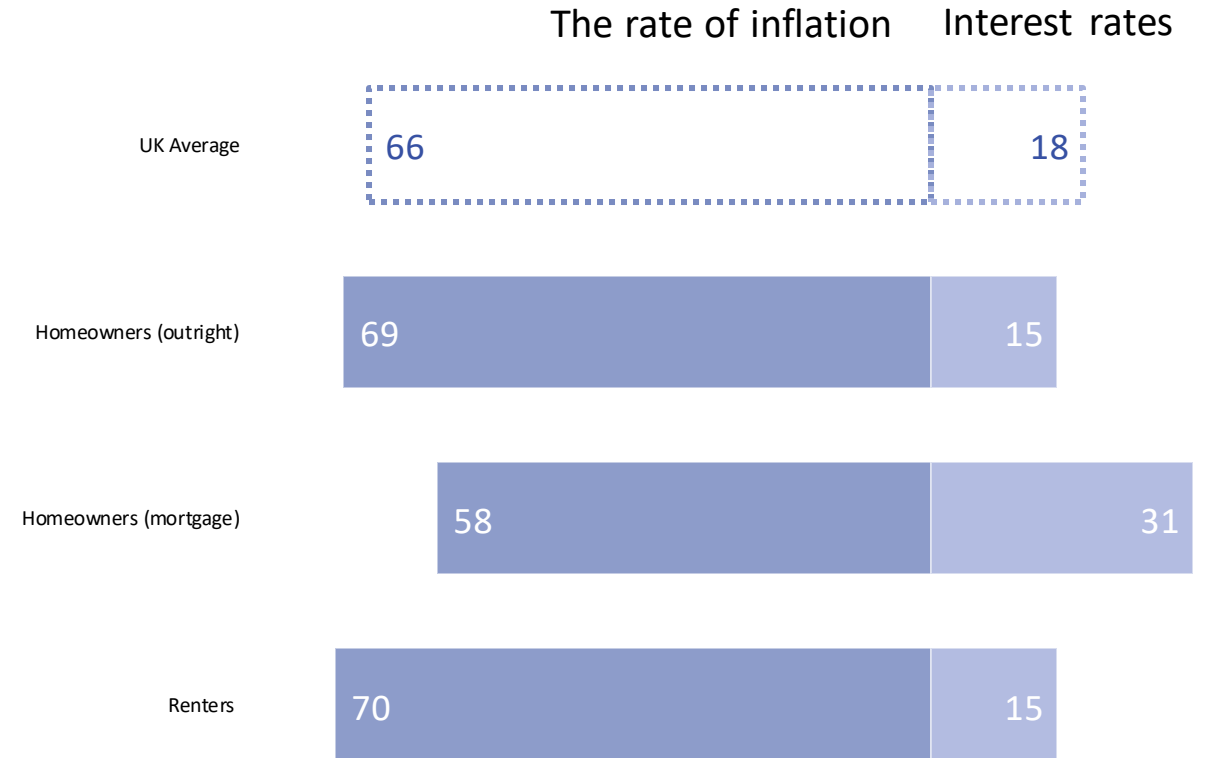


Public more likely to be concerned about inflation over interest rates - concern about interest rates is highest among Established Liberals and mortgage holders

Which, if any, of the following are you concerned about most?



Which, if any, of the following are you concerned about most?



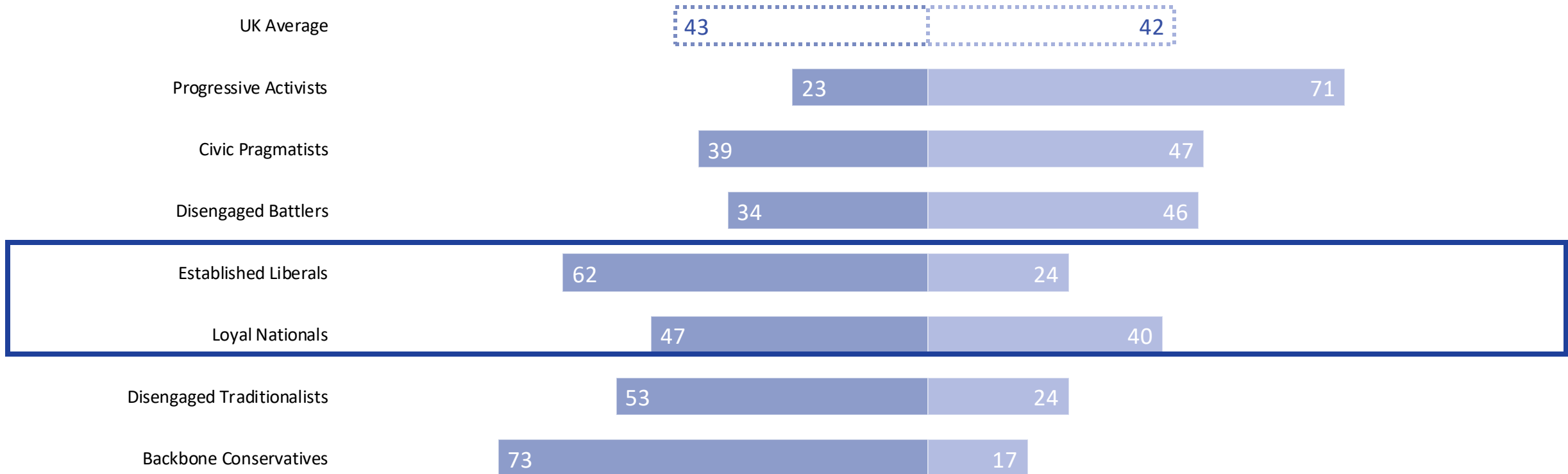


# Prioritising growing the economy or tackling inequality



There are clear differences between typical Blue Wall and Red Wall voters over whether to prioritise growing the economy or tackling inequality

Economic growth that makes everyone richer, even if there are big gaps between the rich and the poor      Closing the gap between the rich and the poor, even if it means we are worse off as a result

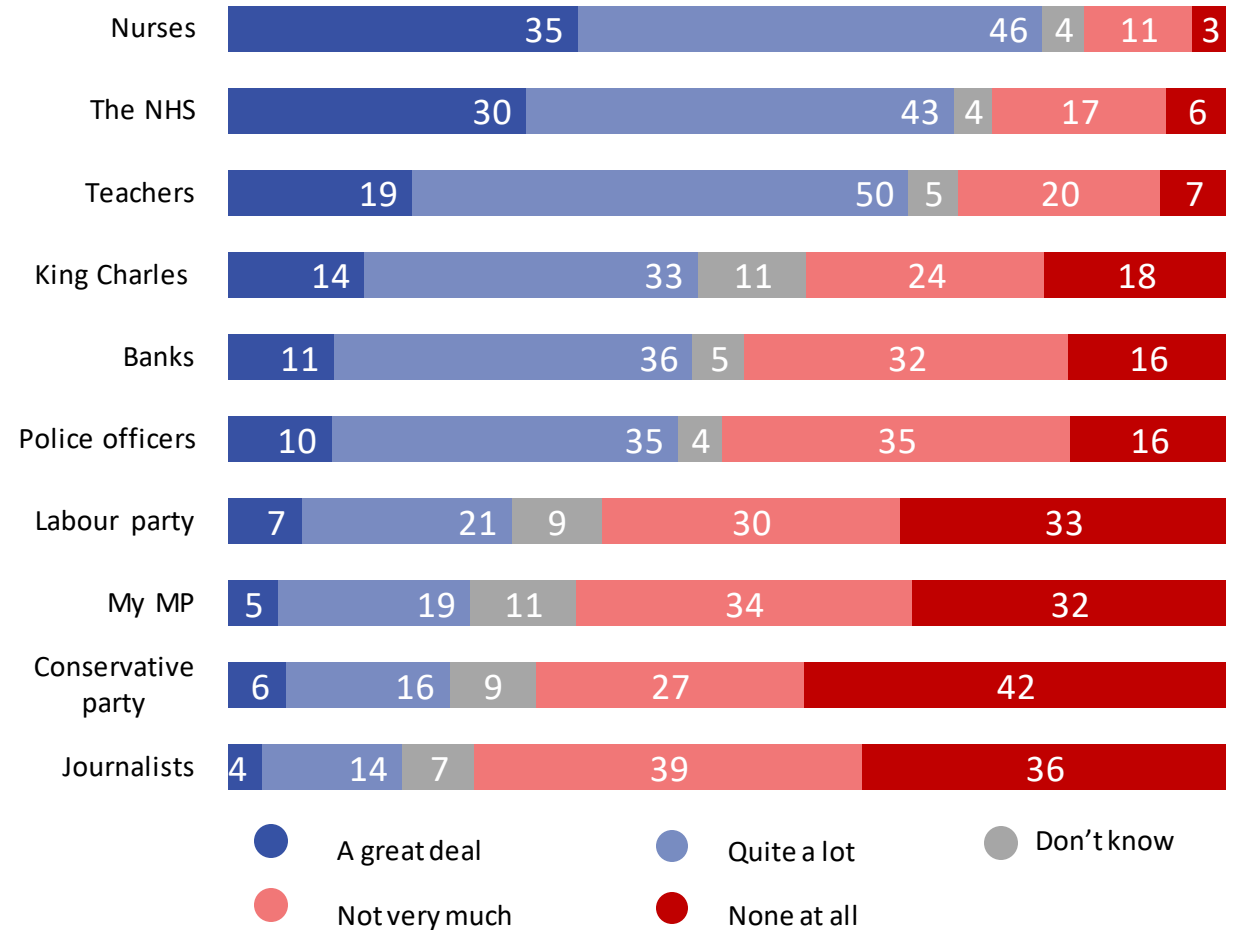




# Issue: NHS and Waiting Lists

- The NHS has significantly risen in concern on issue tracker over the last year.
- In focus groups, we find that **everyone has an ‘NHS failure story’** – where they or a relative has had to endure long waits or given up entirely trying to seek help.
- **Public sympathy sits squarely with doctors and nurses**, unlike e.g. train drivers the public's admiration for the NHS drives support for strikes even if they are worried about the consequences
- **There is less sympathy for GPs**, with the public frustrated with a system that seems outdated and impossible to use
- **Openness to major reform to the NHS is rising – and reform should tap into the public’s practical frustrations** – e.g. stuck on a telephone wait line, long waits in A&E.

How much trust do you have in the following?

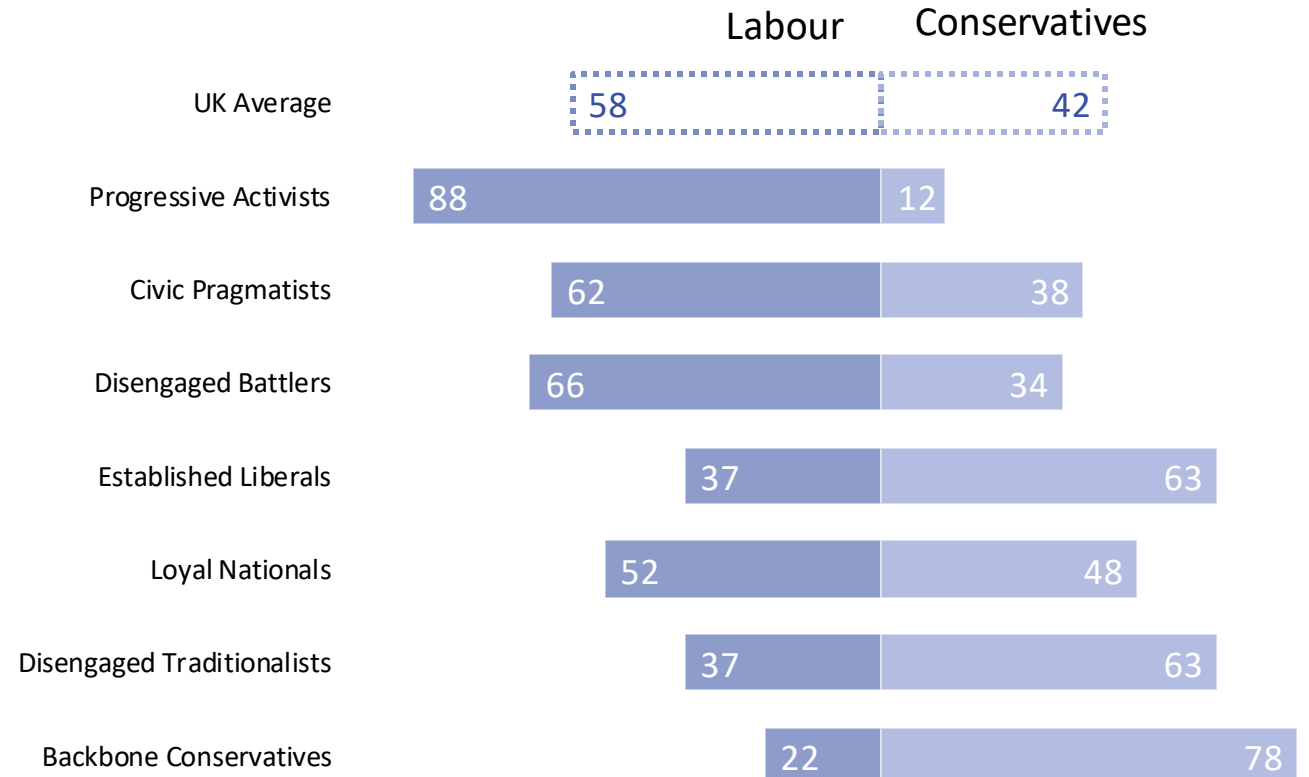




# Issue: Crime and anti-social behaviour

- Labour lead the Conservative (58:42) on most trusted to tackle crime in the UK
- To tackle anti-social behaviour, some of the **most popular policies involves making perpetrators clean up their actions.**
- **More visible policing is the top proposal for better dealing with crime** - seeing police leads to a direct increase in feeling safe
- **Red wall voters are significantly more likely to say anti-social behaviour is a serious crime** and consider it a problem in their local area.
- The public think **levelling up is impossible without tackling crime**
- But concern the police are dealing with ills that should be dealt with elsewhere - mental health.

## Which of the following would you trust most to tackle crime in the UK?

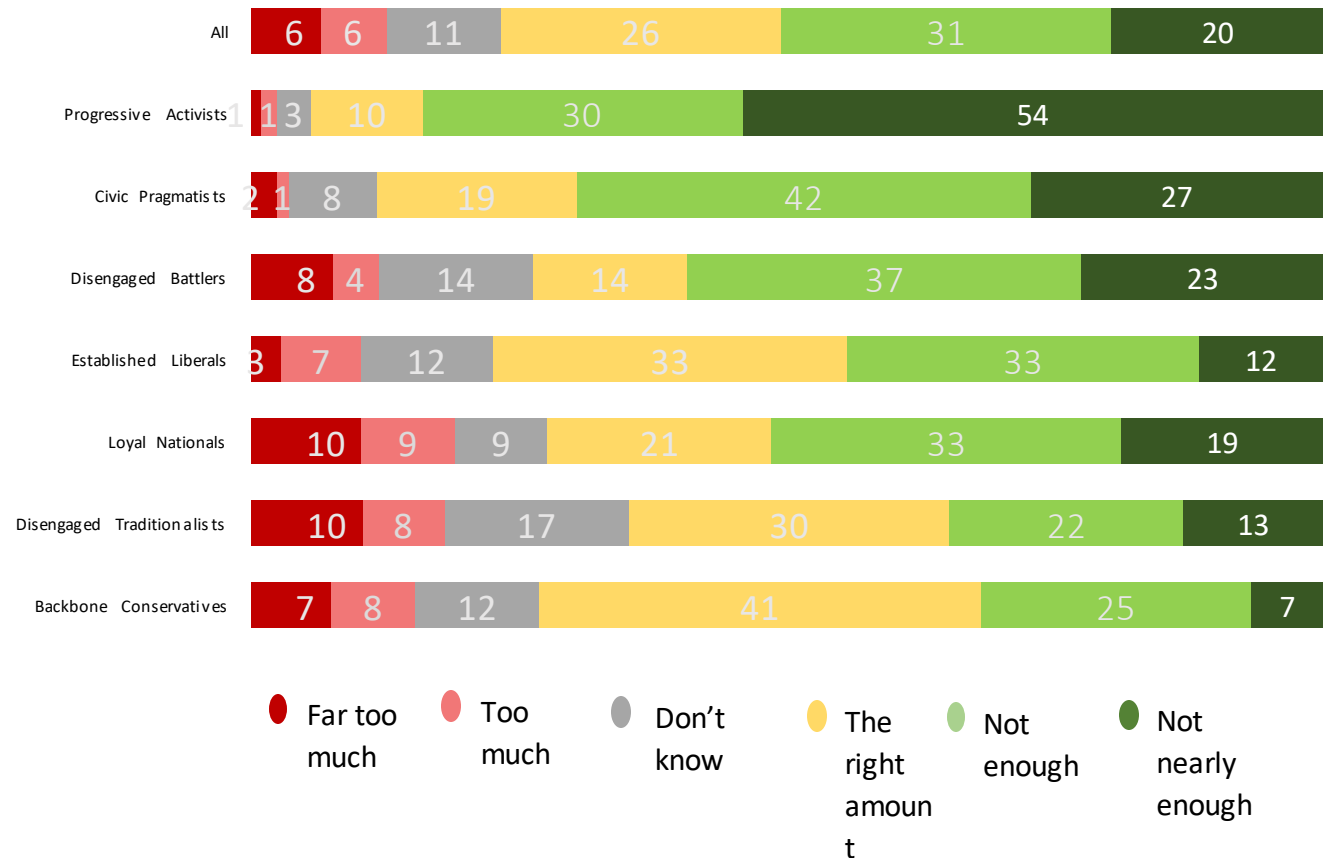


# Issue: Climate and the environment



- **The public want to see the tangible benefits that they will get from net zero transition** (lower bills, better jobs, more secure future) – abstract or angry framings land badly across the board outside of activist groups. Big numbers land badly, compared to specific initiatives.
- **Threat perception also plays well with Red Wall voters.** The risk of severe climate impacts such as fires seen elsewhere, or being dependent on 'mad men' like Putin motivates action
- **Britons as a whole think the government is not doing enough on climate and the environment.** But there is a link between trust in politics and willingness to take action on climate – will it be 'one rule for them'
- **Talk about net zero in plain terms** – as a balancing message rather than a zeroing message – increases support for net zero by 10 points.

## On the issue of climate change would you say the Government is doing...

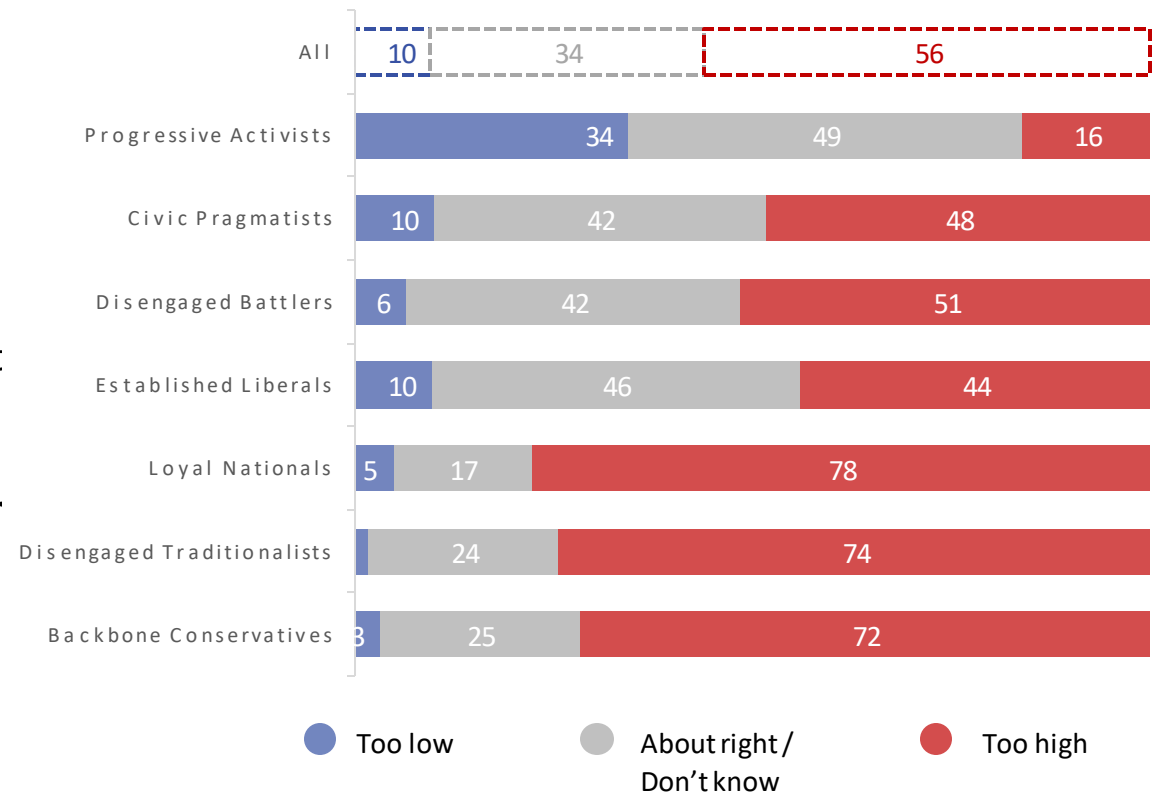




# Issue: Immigration

- **Most think immigration has increased since the Brexit referendum, and that immigration is too high.** The three socially conservative segments feel this most strongly. Progressive Activists are outliers
- **An overwhelming majority say control over immigration is more important.** This helps explain why there is such a focus on asylum seekers crossing the channel, it is the epitome of lack of control/agency
- **A plurality (49 per cent) think immigration should be reduced,** with 29 per cent wanting it 'reduced a lot', to 19 per cent who say it should be increased. The Progressive Activists are the only segment where more think it should be increased than reduced
- **People most identify pressure on public services and housing as the biggest negative effects of immigration.** Few say multiculturalism. Filling important jobs in the NHS is seen as the main positive effect of immigration

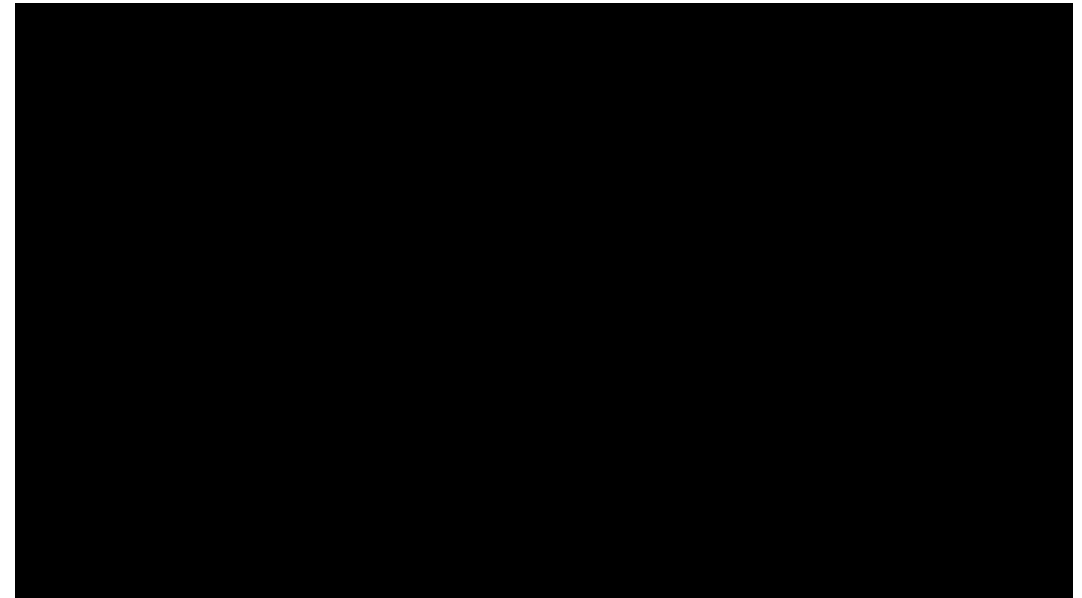
**And since the Brexit Referendum do you think the level of immigration into Britain has been too high, too low or about right?**



# Issue: Small Boats

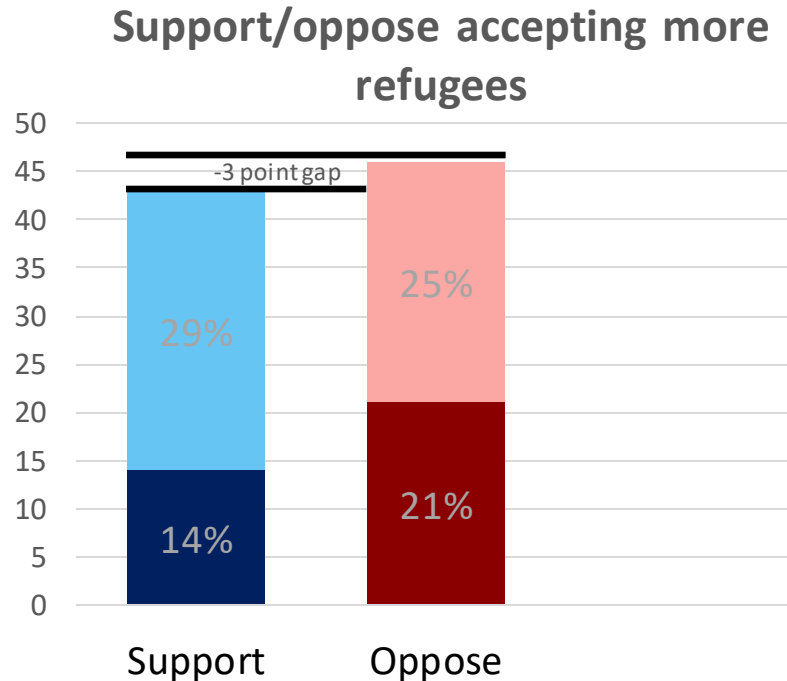


- **Stopping small boats crossing is an important issue for the public** – currently 4<sup>th</sup> top issue. It is even more important with Loyal Nationals/Red Wall voters.
- **More support than oppose the Rwanda policy** (currently 46% support, 28% oppose)
- However, **more than half (51%) think the Rwanda policy will make no difference** or increase crossings. Only 36% think it will reduce crossings
- Public approach to refugees is **compassion** (e.g. welcoming Ukrainians, Afghans, Hong Kongers) and **control** (stopping disorder and chaos of crossings).
- On the ban for anyone claiming asylum after crossing the channel – **around half the public want to see exemptions** in place for children, genuine refugees, victims of modern slavery, those fleeing conflict, women fleeing persecution.



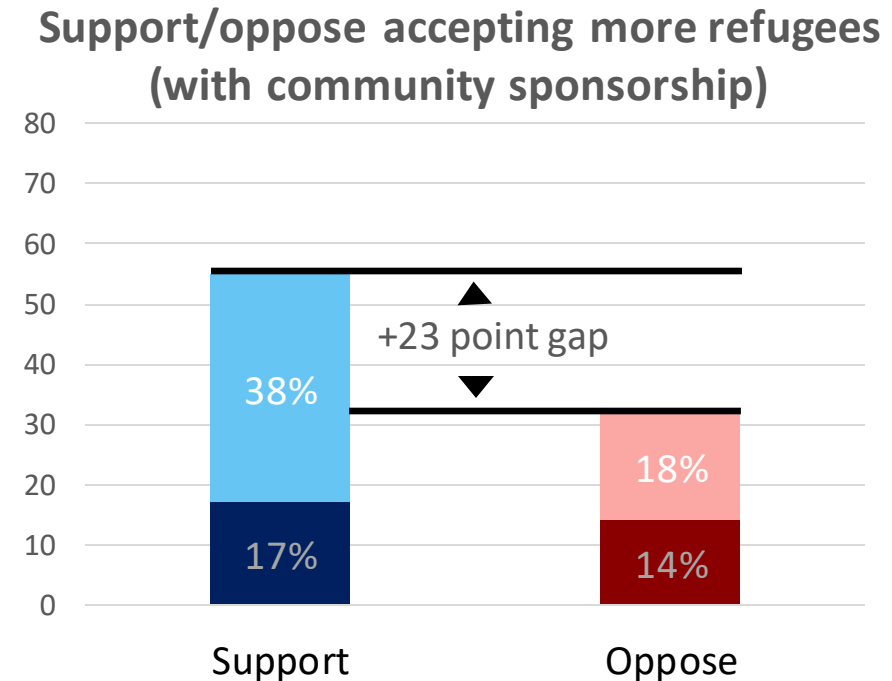
# The importance of control in the refugee and immigration debate

Practical policy innovations like community sponsorship increase support and reduce opposition significantly



There are different opinions on the UK's policy on refugees. In general, do you support or oppose the UK accepting more refugees? (Responses: Strongly support, tend to support, tend to oppose, strongly oppose)

(N=2030, More in Common/ Public First November 1-3, 2022)



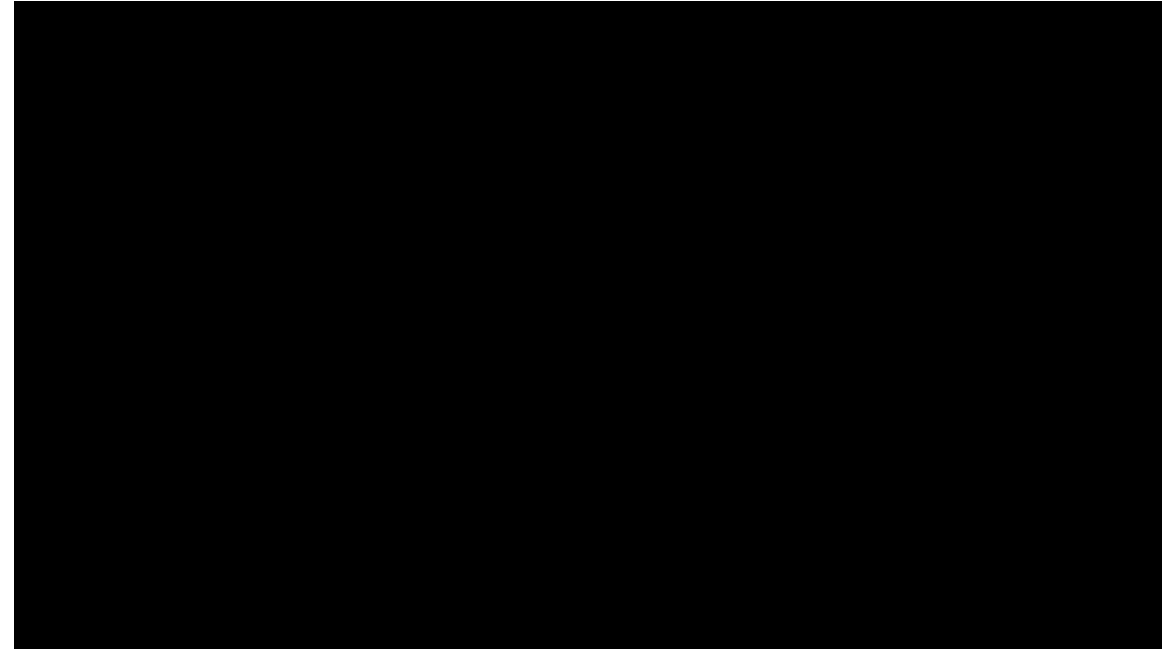
There are different opinions on the UK's policy on refugees. One approach is allowing refugees to settle in the UK through 'community sponsorship'. This policy allows ordinary Britons together with their churches, community groups and schools to volunteer to sponsor refugees by doing things like helping them find a job, learn English and generally settle into their community. Under these conditions, would you support or oppose accepting more refugees?





# Issue: trans and gender identity debate

- **The debate about transgender people consistently ranks at the bottom of our 'top issues' tracker**
- **Stark contrast with online and elite debate and the public on this issue** – public strive for balance and nuance.
- **When asked about trans people in their community, the public start with compassion and kindness** in general – with concerns about children and women-only sports.
- **Most think it's important for politicians to have a clear policy on the issues at play**, but it's not an electoral priority and most want politicians and professionals to get on with it.
- **Instead perplexed by politicians and the media spending so much time talking about gotcha questions** and not focusing on other more pressing priorities.
- Many trust professionals to make choices depending on the context

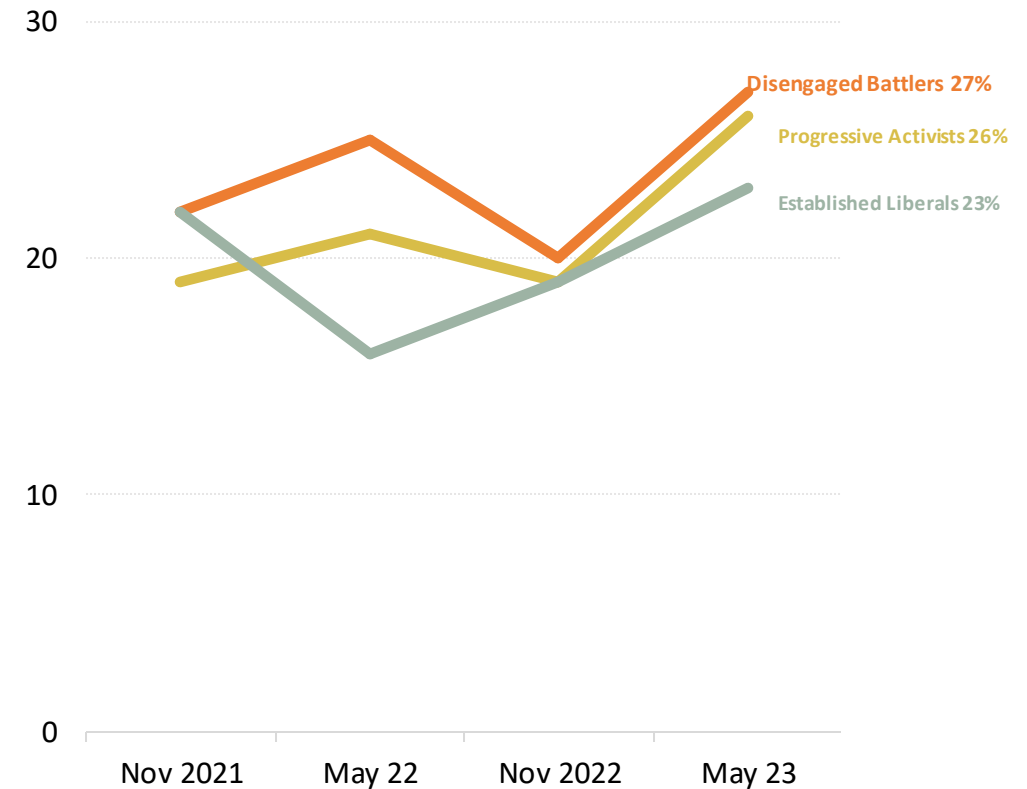




# Issue: Housing

- **Public is not divided into NIMBYs or YIMBYs**
- **Rising concern about cost and availability of housing** – particularly among the most deprived voters and typical blue wall voters
- **Older generations increasingly concerned about their children**, not just ability to buy a house, but having come into contact with 'dodgy landlords'
- **But worries about sustainability of new developments.** Pro-building needs to answer the 'and what about everything else' question.
- **Opposition to housebuilding on the green belt (50 per cent) currently trumps support (30 per cent)**

Percent listing **AFFORDABLE HOUSING** as a top-three issue facing the country:

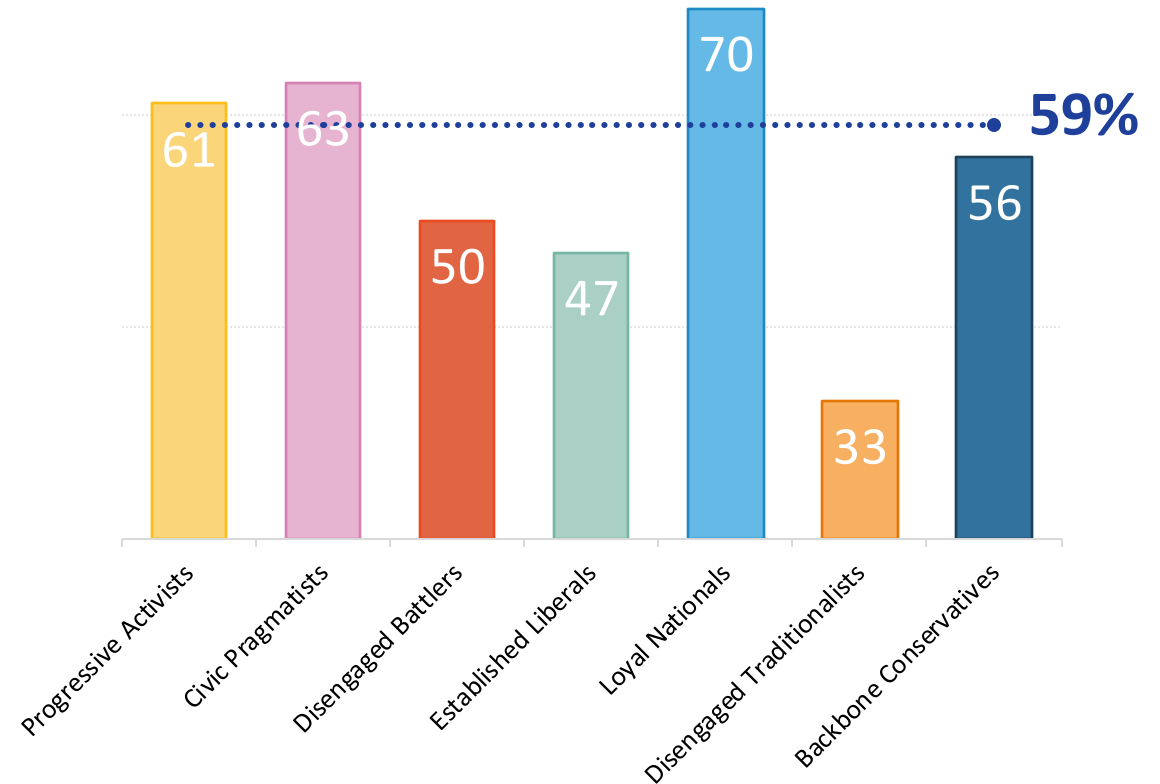


# Issue: Levelling Up



- **Levelling up has cut through as a phrase and a policy** – only 10% have no idea - People were excited about the idea of investment in their area.
- **People are fairly happy to see 'London levelled down'**
- **Suggestions that levelling up was Tory pork barrel politics had the opposite effect** to what opponents intended – focus groups in North and Midlands told us they were happy if electing a Tory MP meant more money for their area
- **People want levelling up that is hyper local** – parks, high streets, roads – less interest in flagship projects.
- **A real sense that delivery hasn't matched the promise.** Some think Boris cared more about it than Rishi, while others think the Government never really meant it
- **For red wall voters in particular it will determine how they vote** in the next general election. If undelivered risks furthering detachment/cynicism in politics.

**How important or unimportant will the Government's ability to deliver on its promise to "level up" the country be to your decision on what party you vote for at the next General election?**



# The seven segments on levelling up...



What does the term “Levelling Up” mean to you? Please describe in a few words.

“A political soundbite with no tangible meaning or outcomes.”

Progressive Activist



“Fair investment all over the country”

Civic Pragmatist



“Not sure, sounds like a Government scam”

Disengaged Battler



“Spreading the wealth throughout the country, not just the south and south-east.”

Established Liberal



“Stop ploughing money into London & remember there is life north of the Watford Gap!”

Loyal National



“It’s a meaningless term”

Disengaged Traditionalist



“Making Britain better. Getting the people working and creating more jobs.”

Disengaged Traditionalist

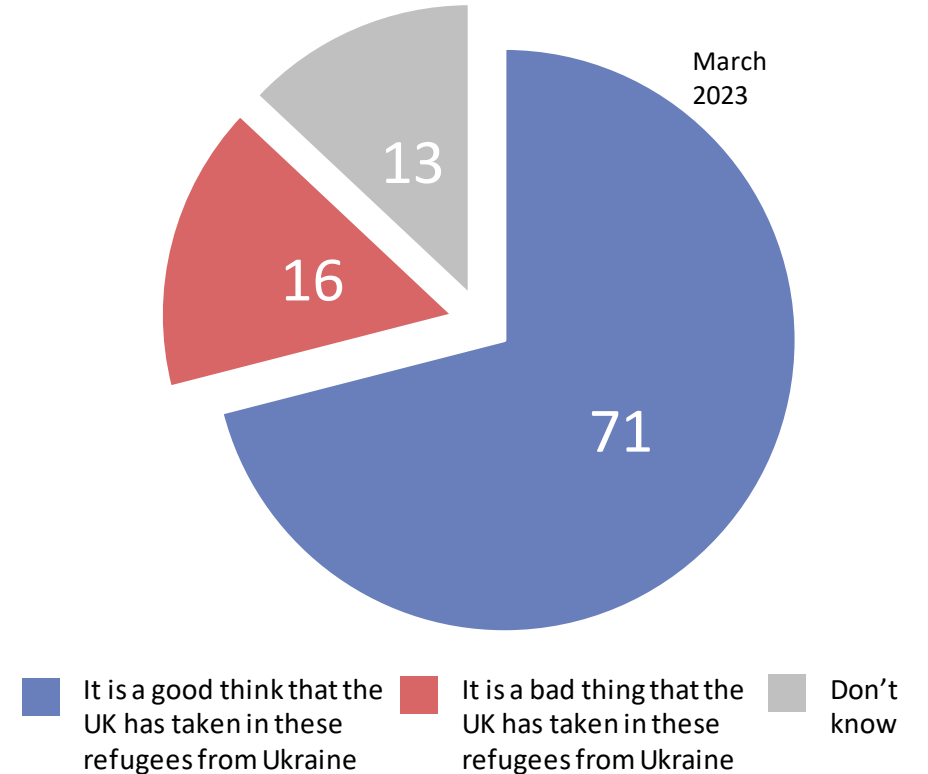




# Issue: Ukraine

- **Three quarters of the public think it is important that Ukraine defeats Russia** – a recurring theme in focus groups is about Putin as the new Hitler
- **Public want Britain to stay the course in Ukraine**, even if it leads to more pain here in the UK. For many Britons the conflict does represent a more 'existential' battle and there is no doubt who the right and wrong sides are.
- **The public are proud of what Britain has done in welcoming Ukrainian refugees** – seven in ten say it is a good thing that the UK has taken in over 150,000 refugees.
- **There is strong support to extend the Homes for Ukraine model** to other groups of refugees including Afghans and other refugees.

Pride in taking in refugees in the UK

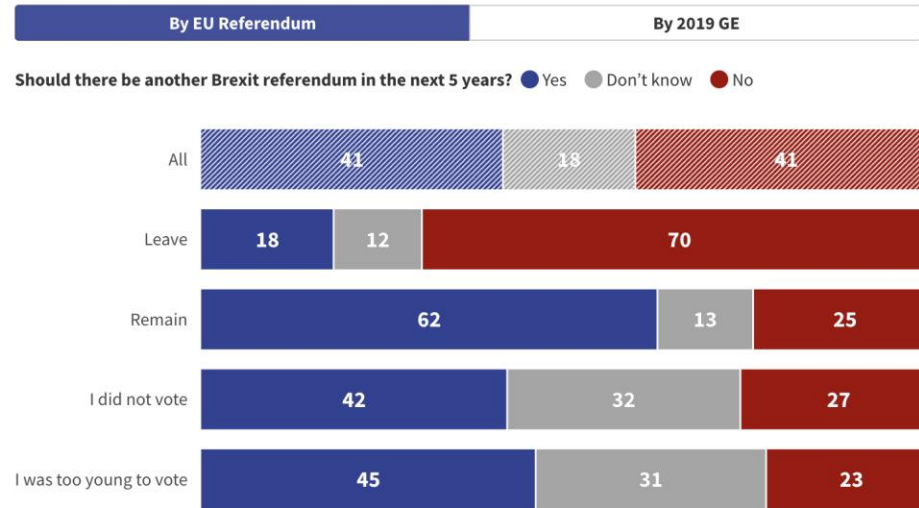


# Issue: Brexit

- The proportion of people saying their Brexit vote was an important part of their identity has fallen from 50 per cent to 39 per cent – this has fallen more dramatically for Leavers (19 point drop) than Remainers (4 point drop)
- Eight in ten Remain voters say Brexit hasn't been a success, while half of leave voters say the same
- If a referendum were held on rejoining the European Union today, Rejoin would win by a 16 point margin
- But the public is split equally over whether there should be another referendum
- Most people don't know what Starmer's EU policy is, but rejoining would make around half of swing voters **less likely** to vote for the Labour party.

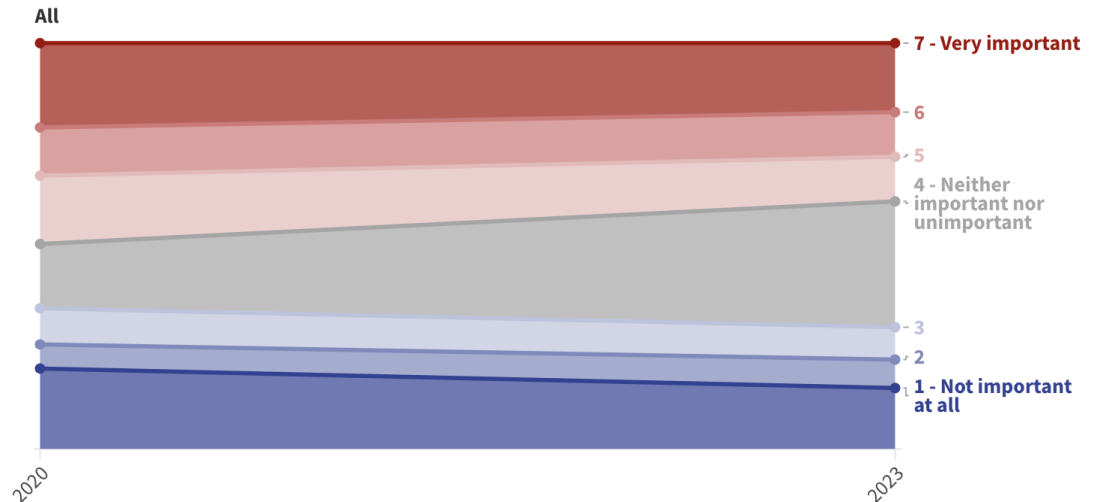


## The public is split on whether there should be another Brexit referendum in the next 5 years



## Brexit identities have become less important for both Leave and Remain supporters

How important to your identity is the way that you voted in the EU referendum?



# Questions & Answers

# Our public opinion research services



## Nationally-representative polling

More in Common regularly conducts nationally representative opinion polls in the UK. Our polling has been featured in a range of media outlets – such as The Times, The Guardian and The Telegraph – in addition to powering our own research work.

To prospective clients and partners we offer:

- 10-day turnaround from inception to final results
- Wraparound service, from question wording, to initial data analysis provided by our team
- Use of our British Seven segment lens
- Full data tables on publication, in accordance with British Polling Council rules
- Competitive rates



## Focus Groups

More in Common has conducted hundreds of focus groups over the last few years, for a range of clients from the media, politics, civil society, national institutions and business.

There are many advantages to focus groups:

- Rapid-response qualitative research, quicker than polling
- Adds deeper layer to, and can inform, survey design for quantitative research
- Powerful to hear views on an issue in people's own words

We typically draw participants from a single area (e.g. specific constituency), from desired demographic groups. We find online groups work best, for ease of organisation and the most organic conversation. We also run in-person groups, particularly for media (such as BBC Newsnight or TalkTV).



# Our consultancy services



## Strategic Communications Advice

We shape clients' strategic communications strategies blending our ongoing public opinion insights and message testing with our team's broad strategic communications experience, helping clients engage beyond the usual suspects, and find the best ways to have good conversations with more sceptical audiences.



## Campaign Development

We work with a range of businesses charities, civil society campaigners and national institutions to build communications and broader campaigns from the ground up – offering audience insights, creative support and strategic advice on how to set up and run successful campaigns.



## Trainings and workshops

We deliver bespoke training programmes to senior leaders in government departments, business and across civil society to help them think more about diversity of thought within their organisations and the gaps between the senior leadership of organisations and the public.



**Luke Tryl**

**UK Director**

*luke@moreincommon.com*