Sunak's Choice
A pre-Autumn Budget Briefing

Introduction

The 2019 election saw a dramatic shift in the UK's electoral landscape. Towns and villages in the North and Midlands of England and across Wales that had voted Labour for generations instead backed the Conservatives. Together with Tory support in their southern heartlands, these new voters enabled the party to emerge from that election with an 80 seat parliamentary majority.

Many commentators suggested that the election marked permanent realignment in British politics and that working class voters who backed the Conservatives would continue to do so in future elections. The person who led the Conservatives to that electoral victory did not however share that view. Instead, on the day after his victory, Boris Johnson thanked voters in what has become known as the 'Red Wall' for lending him their vote, at the same time acknowledging that they may well consider turning back to Labour.

Fast-forward to today and Boris Johnson's words turned out to be prescient. Following party-gate, the cost of living crisis and the former Prime Minister's own defenestration, support for the Conservatives among the segment of the population that best represents 'Red-Wall' voters (Loyal Nationals) has collapsed. 56 per cent of this group supported the party in 2019, just 32 per cent say they would today, a lower proportion not just than voted for the party in the last election, but also in 2017.

On the other side of the Tory tent a different segment of the population has been slowly moving away from the Conservatives. Many of these voters who make up the so-called 'Blue Wall' put aside their concerns about Brexit, and dislike some of Johnson's rhetoric, to reluctantly vote Conservative in 2019 (albeit in lower numbers than in 2017). They did so in large part to stop Jeremy Corbyn.

However, since that election this group, who are more socially liberal in their outlook than any other part of the Tory Coalition, have continued to move away from the Conservatives. Among the group that best represents Blue Wall voters (Established Liberals) support under Johnson fell to 37 per cent - a stark low from a group who formed a keystone of the party's support under David Cameron.

Since the election of Rishi Sunak as Conservative Party leader, however, Conservatives' fortunes have diverged with these different groups of voters. Where fewer than a third of the group of Red Wall voters now say they will vote Conservative, the story is different in the Blue Wall. The new Prime Minister appears to have brought these voters home and remarkably, despite a swing against them in every other population segment, Conservative support among Blue Wall voters is now back to the same level as in 2019.

The temptation for the new Prime Minister, despite his expressed desire to deliver the 2019 manifesto, might be to assume that he can rely on these, more naturally Tory, voters alone and accept some loss of support among less traditional supporters in the Red Wall.

That would be a mistake. First because, although David Cameron was able to win a very narrow, Parliamentary majority without the Red Wall, he did so with a different Coalition. Cameron's appeal was not just to Established Liberals, but also to some of the segments of the population, particularly Civic Pragmatists, who now lean decisively left in their voting intention. These groups are unlikely to return in large numbers to the Conservatives.

Second, many Red Wall voters voted for the Conservatives on the promise of a new democratic settlement. That settlement was one which would see investment and attention directed at their communities which had felt neglected for decades. Failure to deliver on that promise will not only push this group away from the Conservatives, but potentially away from the political mainstream entirely. As our previous research has shown, there is a growing group of disillusioned voters who are willing to embrace a party of the populist right.

For the sake of the Conservative Party fortunes and the wider health of our democracy, Rishi Sunak cannot afford to ignore Red Wall voters.

But nor will rebuilding the 2019 Conservative tent be easy. Not only have the core drivers of the 2019 result (Corbyn, Brexit and Johnson) disappeared, but when it comes to the biggest challenges of today – repairing the economy and tackling the cost of living crisis – the two wings of the Conservative Coalition are looking in opposite directions.

Voters in the Blue Wall are increasingly concerned about the price tag that the Government's cost of living support entails, and think the economic circumstances now make cuts a necessity. Red Wall voters, on the other hand, continue to say that too little is being done to help them cope with the cost of living and think the letter and spirit of the 2019 manifesto means the Conservatives do not have a mandate for spending cuts.

And while both sides of the Coalition want to see measures to reduce the deficit, they are split on how to do it. Red Wall voters are more likely to favour tax increases on the rich and corporations, and Blue Wall voters more likely to favour spending restraint and fewer subsidies for energy bills. At the same time, while the cost of living crisis might make the need to raise benefits even more pressing, no part of the Tory Coalition wants to see them rise by as much as inflation.

But there are some obvious pointers for the Prime Minister and Chancellor as they undertake their budget balancing act next week. Across the Conservative voting segments of the population, there is clear support for a windfall tax on energy and oil companies, consistent support for protecting the NHS from spending cuts and for raising pensions in

line with inflation. There is also unified support for continuing to back Ukraine against Russia's invasion.

The public also understand the need for the Government to make tough choices, even if they think some of the circumstances necessitating those choices are of the Conservatives own making. If the Government is able to level with voters about the challenges we face and the actions to deal with them in the Budget they will at least receive a fair hearing.

The Government's ability to convince different parts of the population that the decisions made in next week's Budget are the right ones will not be easy, but if they manage to be successful, voters currently crying out for a fresh start, might eventually be prepared to give the Conservatives another look.

Section 1: The Shifting Tory Tribes

1.1. The Tory Tribes at the 2019 General Election

The Tory Coalition that propelled Boris Johnson to victory was a broad one, spanning four of the [British Seven](#) segments of the UK population[1]: Established Liberals, Loyal Nationals, Disengaged Traditionalists and Backbone Conservatives.

- **Established Liberals** are a socially liberal but economically right-wing group, who are most akin to Cameron Conservatives. They also serve as a good proxy for a 'Blue Wall' voter. The only segment of the Conservative coalition to have voted Remain, their support for the Conservatives actually fell by 4 points from 2017 to 2019, despite the overall swing to the party at that election. 45 per cent of Established Liberals voted for the Conservatives in 2019.

- **Loyal Nationals** were the group that swung most heavily (by 9.5 points) to the Conservatives between 2017-2019. Socially conservative, but economically statist, this group best proxy the average 'Red Wall' voter. They voted overwhelmingly for Brexit (over 70 per cent) and identify primarily as working class. Although they started drifting away from the Labour prior to 2019, that election turbocharged their realignment. 56 per cent of Loyal Nationals voted for the Conservatives in 2019[2].

- **Disengaged Traditionalists** often do not vote but were motivated to turnout in 2019 and during the Brexit referendum. They value order, self-reliance and are generally suspicious of others. Two thirds of Disengaged Traditionalists (65 per cent) voted for the Conservatives in 2019.

- **Backbone Conservatives** are the most solidly Conservative of all the segments, and most likely to be members of the Conservative Party. 79 per cent voted Conservative in 2019.
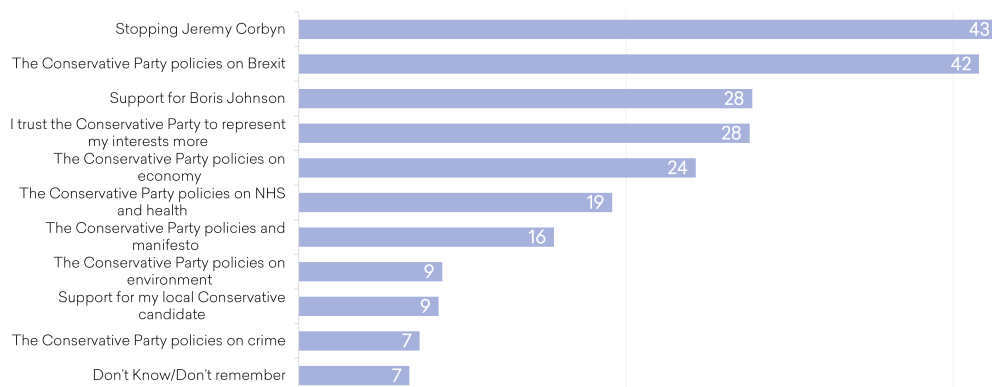
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[1] For further details see Appendix A

[2] Given how well the groups map onto one another this report will use the term 'Loyal Nationals' interchangeably with 'typical Red Wall voters' and Established Liberals interchangeably with 'typical Blue Wall voters'.

The breadth of that Coalition was not, however, matched in its depth. For many voters their relationship with the Tory Party was distinctly transactional. Across the four Conservative segments, people voted the way they did to stop Jeremy Corbyn and to get Brexit done.

Figure 1.1

Reasons for voting Conservative in 2019
Stopping Corbyn and getting Brexit done were the main reasons why people say they voted Conservative in 2019

Reason	Value
Stopping Jeremy Corbyn	43
The Conservative Party policies on Brexit	42
Support for Boris Johnson	28
I trust the Conservative Party to represent my interests more	28
The Conservative Party policies on economy	24
The Conservative Party policies on NHS and health	19
The Conservative Party policies and manifesto	16
The Conservative Party policies on environment	9
Support for my local Conservative candidate	9
The Conservative Party policies on crime	7
Don't Know/Don't remember	7

"Obviously, Boris won quite a landslide against Jeremy Corbyn, and everything that went with that, because he was going to deliver Brexit. And all the other parties were either going to have a referendum again, or completely stop it. So that brought a lot of Labour people over"

Jonathan, Backbone Conservative, Hitchin

"I voted Conservative, purely on the back, not so much of Brexit for me, but it was just because Boris... I would rather Boris Johnson be in charge than Jeremy Corbyn, to be honest. I have been a Labour voter in my youth...but it's not the working man's party it once was...Champagne socialists that's what I call them now"

Mike, Loyal National, Blyth

Beyond those two overarching motivations, there were specific factors that explain why individual segments voted Conservative. For Red Wall voters there is no doubt part of their motivation was support for Boris Johnson. Conversely, Blue Wall voters also backed the Conservatives, despite their concerns about Brexit and Boris Johnson's rhetoric, because of continued attachment to their economic policies.

Figure 1.2

Reasons for voting Conservative in 2019 – by segment
While the coalition was united over stopping Jeremy Corbyn getting into No. 10 – on Brexit and the economy there was less consensus where the Established Liberals were outliers
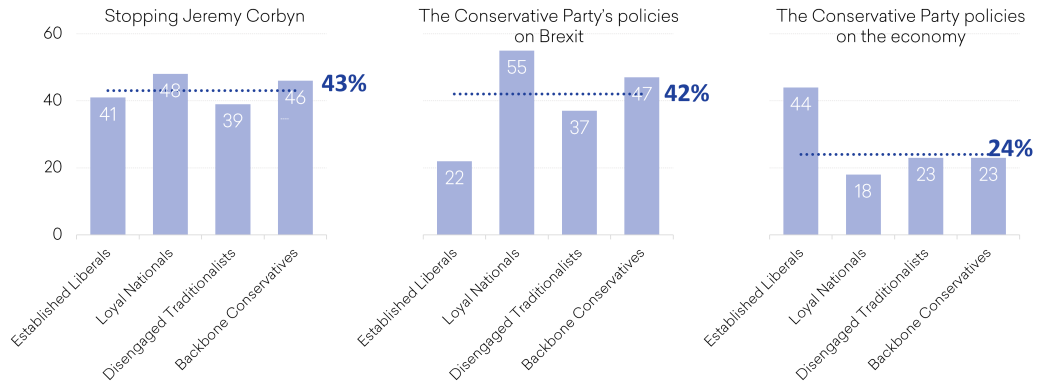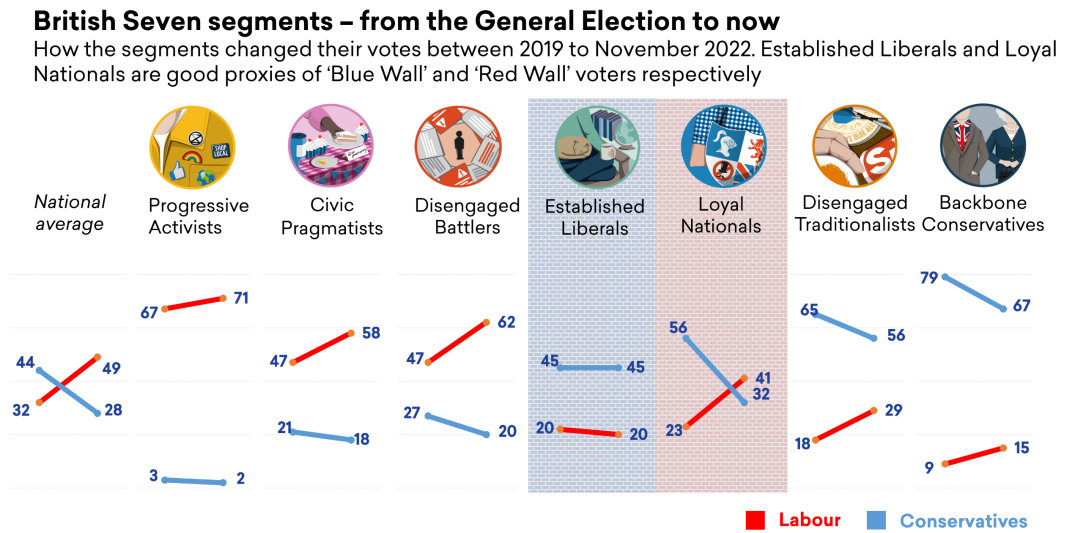

At least three of those drivers, Corbyn, Johnson and Brexit have entirely, or mostly, disappeared as electoral influences – and recent events suggest that the Conservatives' record on economic competence is not the electoral strength it once was.

The upshot of voters' broad, but shallow, attachment to the Conservative Party in 2019 is high potential for volatility. Unlike in the United States, where strong partisan identities lead to relatively limited shifts regardless of events, the Conservative Party's fortunes are more directly tied to public opinion. As a consequence a combination of anger at party-gate, bewilderment at the economic chaos of recent months, and the perception that not enough has been done to tackle the cost of living saw support for the party, before Rishi Sunak's election, fall to record lows.

1.2. Where are the 2019 Tory voters going?

The Figure 1.3 shows that erosion of the Conservative share of the vote across the British Seven segments since the last General Election.

Figure 1.3

British Seven segments – from the General Election to now
How the segments changed their votes between 2019 to November 2022. Established Liberals and Loyal Nationals are good proxies of 'Blue Wall' and 'Red Wall' voters respectively


Alongside the collapse in headline support for the Conservatives is the arguably more electorally ominous finding that 43 per cent of the electorate say they will almost certainly never vote Conservative at the next election (the highest of any of the political parties tested).

Figure 1.4

How likely would you be to vote for the following parties at the next election?
A substantial portion of the public said they would never vote for the Conservatives – almost twice as high as the number who say they would never vote Labour
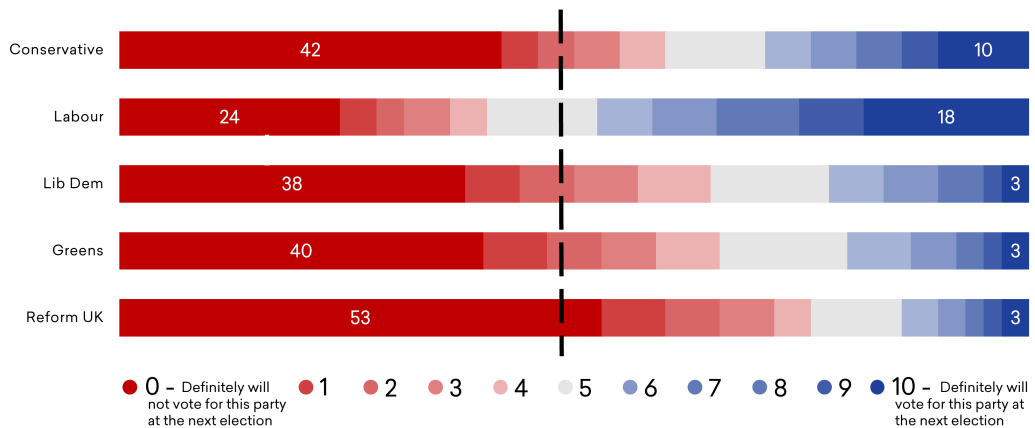
While support for the Conservatives has fallen significantly since 2019, that decline is not consistent across the Conservative-voting segments; the party is faring better at maintaining its support with some groups but doing worse with others.

Backbone Conservatives

How likely would you be to vote for the following parties at the next election?
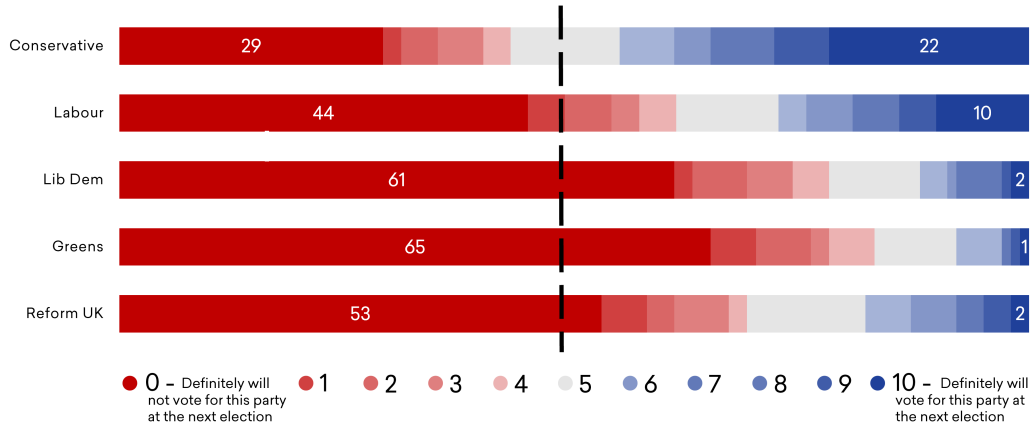Backbone Conservatives
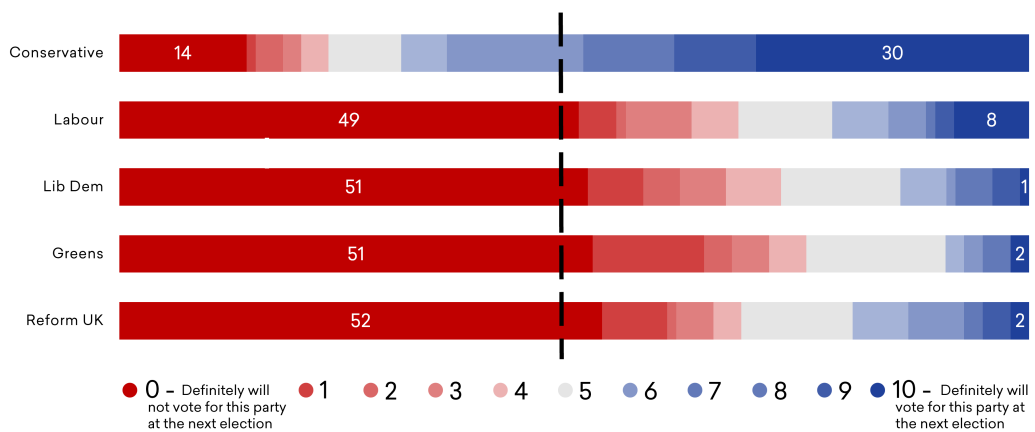
Among Backbone Conservatives, the core of the Conservative vote, there has been a small fall in Conservative support, but no real evidence of the segment embracing Labour. Instead, the risk is that disillusionment with the Conservatives means that they either stay at home, or vote for another party of the right such as Reform UK. 12 per cent of Backbone Conservatives say they are likely to vote the for right wing populist party.

However, when asked on a scale of 0-10 how likely they are to vote Conservative, 64 per cent of Backbone Conservatives give a score of seven out of ten or higher, and only 14 per cent give a score of zero. In contrast, 49 per cent of this group say that they would never consider voting Labour at the next election. The likelihood then is that as the election approaches Backbone Conservatives will, however reluctantly, return to the Conservative fold.

Disengaged Traditionalists

Figure 1.6

How likely would you be to vote for the following parties at the next election?
Disengaged Traditionalists

Party	0	22
Conservative	29	22
Labour	44	10
Lib Dem	61	2
Greens	65	1
Reform UK	53	2

● 0 – Definitely will not vote for this party at the next election ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10 – Definitely will vote for this party at the next election

More Disengaged Traditionalists have shifted directly to the Labour Party than Backbone Conservatives. However, they are also one of the segments that is least likely to vote. In 2019, an inflated number of Disengaged Traditionalists voted because of their desire to see Britain leave the European Union and it is likely fewer will turn out at the next election.

As with Backbone Conservatives, a large proportion (44 per cent) of Disengaged Traditionalists give a score of zero when asked how likely it is they will vote Labour, whereas fewer (29 per cent) say there is no chance of them voting Conservative. In both social outlook and economic preferences they lean right. The challenge for the Government then will be to ensure that this group is sufficiently enthused to go out and vote at the next election.

However, it is the two flanks of the 2019 Conservative Coalition in the Red and Blue Walls that provide the greatest insight into the party's changing electoral fortunes.

Established Liberals

Established Liberals, who best represent the average Blue Wall voter, have started to 'come home' to the Conservatives under Rishi Sunak. The number of Established Liberals saying they will vote Conservative is back at 45% – its 2019 level, albeit still lower than in 2017. This marks a recovery from the low of 37% of Established Liberals saying they would vote Conservative at the end of Boris Johnson's time in office. A fact that is even more striking considering across all the population the swing against the Conservatives stands at 16 per cent. Established Liberals are the only one of the British Seven Segments where Conservative support is not now lower than it was in 2019.
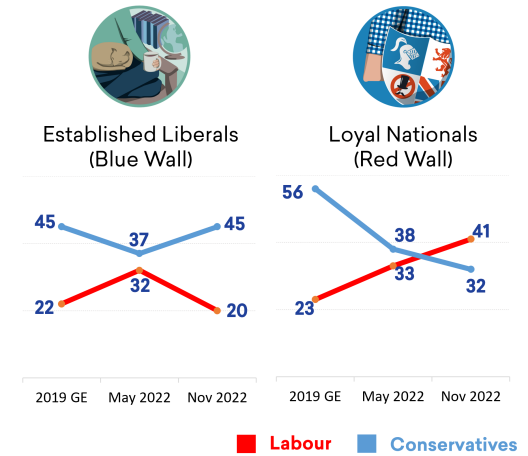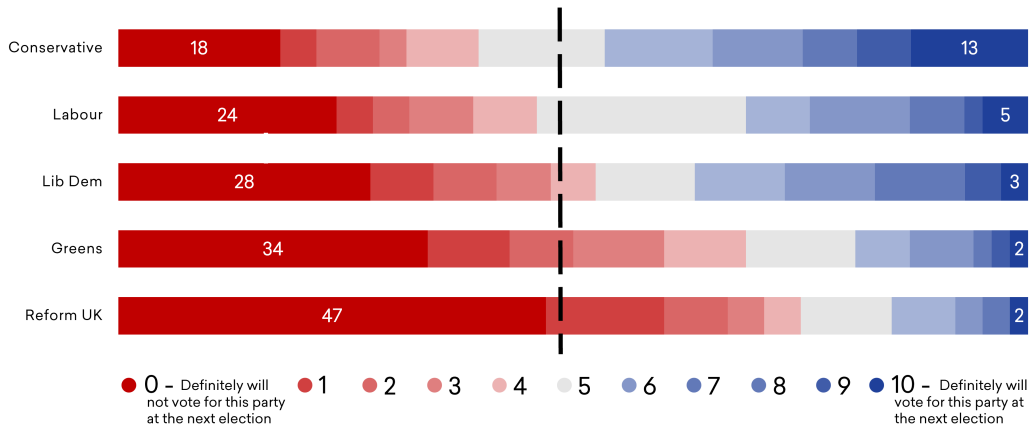
Figure 1.7

Established Liberals
(Blue Wall)

Loyal Nationals
(Red Wall)

2019 GE	May 2022	Nov 2022

Labour · **Conservatives**

Figure 1.8

How likely would you be to vote for the following parties at the next election?
Established Liberals

Conservative	18		13
Labour	24		5
Lib Dem	28		3
Greens	34		2
Reform UK	47		2

0 – Definitely will not vote for this party at the next election **1** **2** **3** **4** **5** **6** **7** **8** **9** **10 –** Definitely will vote for this party at the next election

Only 18 per cent of Established Liberals now say that there is no chance of them voting Conservative at the next election and 24 per cent say that they would never vote Labour. In contrast, 35 per cent of Established Liberals give a score of 7 or higher out of 10 when asked how likely it is they will vote Conservative at the next election, just 25 per cent say the same against Labour. This is obviously a testament to Rishi Sunak's particular appeal to these Blue Wall voters, who have been drifting away from the party because of its stance on Brexit, culture wars and questions about Johnson's rhetoric and integrity.
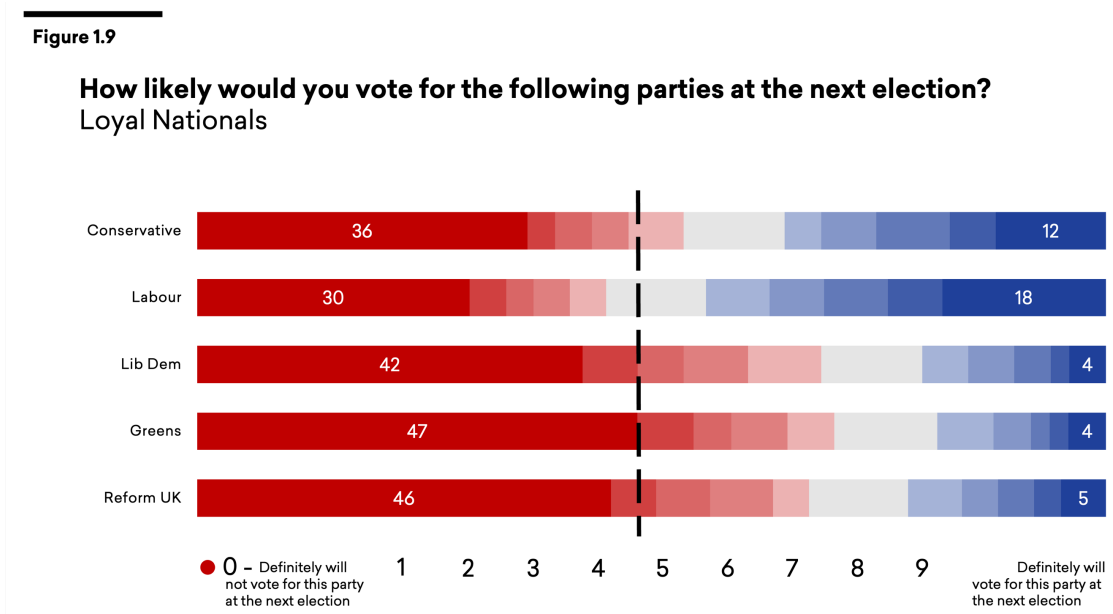
However, bleeding votes to Labour is not the only challenge the Conservatives have to contend with among Established Liberals, 37 per cent (the highest of any group) say that there is a reasonable chance of them voting Liberal Democrat at the next election, and the Conservatives cannot therefore assume their votes are now safely in the Conservative column. Our previous research has found, for instance, any perception that the Conservatives are reneging on their pledge to reach net-zero could cost the party a number of votes with this group.

This strong support among the Blue Wall might suggest that Rishi Sunak is building an electoral coalition more similar to the 2015 coalition, than the subsequent voter coalitions in 2017 and 2019. The challenge facing the Prime Minister in adopting such a strategy is that compared to Cameron he lacks the support the former Prime Minister enjoyed among more Labour voting segments. This is particularly true of Civic Pragmatists who while voting Labour as a whole, still voted for the Conservatives in the past in much higher numbers than they do today.

In short, relying on staunching the bleeding with Blue Wall voters, is unlikely to be enough to deliver a Conservative Government. At the same time it seems winning back the trust of Red Wall voters will be a harder task.

Loyal Nationals

Loyal Nationals are the segment who best represent the average Red Wall voter. They have shifted away from the Conservatives since 2019, having swung dramatically in their favour at that election. In 2019 56 per cent of Loyal Nationals supported the Conservative Party. Today just 32 per cent of these Red Wall voters say they would support the party. Instead 41 per cent of Loyal Nationals would opt for the Labour Party, the first time Labour has led among this group since before the 2017 General Election.

Figure 1.9

How likely would you vote for the following parties at the next election?
Loyal Nationals

Conservative	36 ... 12
Labour	30 ... 18
Lib Dem	42 ... 4
Greens	47 ... 4
Reform UK	46 ... 5

● **0 –** Definitely will not vote for this party at the next election   1 2 3 4 5 6 7 8 9   Definitely will vote for this party at the next election

Compounding this switch, over a third (36 per cent) of this group now say they would never vote Conservative, and only 30 per cent give a score of seven or higher when asked how likely it is they would vote Conservative. In contrast 37 per cent say the same of Labour.

This data seems to affirm Boris Johnson's view that the 2019 General Election saw Red Wall voters lending their vote to the Conservatives rather than a definitive realignment. This, of course, does not preclude the fact that realignment is taking place, rather that new partisan identities are somewhat softer than those who believe demography is destiny might assume.

Regardless of the extent of realignment to date, Sunak's appeal among Blue Wall voters is not currently matched among Red Wall voters. This reason for this is best explained by conversations in qualitative research in the Red Wall. In focus groups with Loyal Nationals, they tend to express a more favourable view of Boris Johnson, and to place slightly more emphasis on social than economic considerations in their electoral calculations than other groups. This combination has so far has made them a less ready audience for the new Prime Minister.

1.3. Starmer and Sunak's appeal

Differences in the Conservatives fortunes between the two flanks of the Tory coalition emerge even more starkly when voters are asked about the attributes of the Prime Minister and Leader of the Opposition.

Among the public as a whole, Rishi Sunak is more trusted than Keir Starmer to deal with the economic problems the country faces (44 per cent vs 36 per cent), more likely to be seen as good in a crisis (39 per cent vs 36 per cent) and to have the right approach to Brexit (28 per cent vs 27 per cent).

Figure 1.10

Rishi Sunak
Established Liberals (a good proxy of 'Blue Wall' voters) are much more favourable to Rishi Sunak than Loyal Nationals (a good proxy of 'Red Wall' voters)
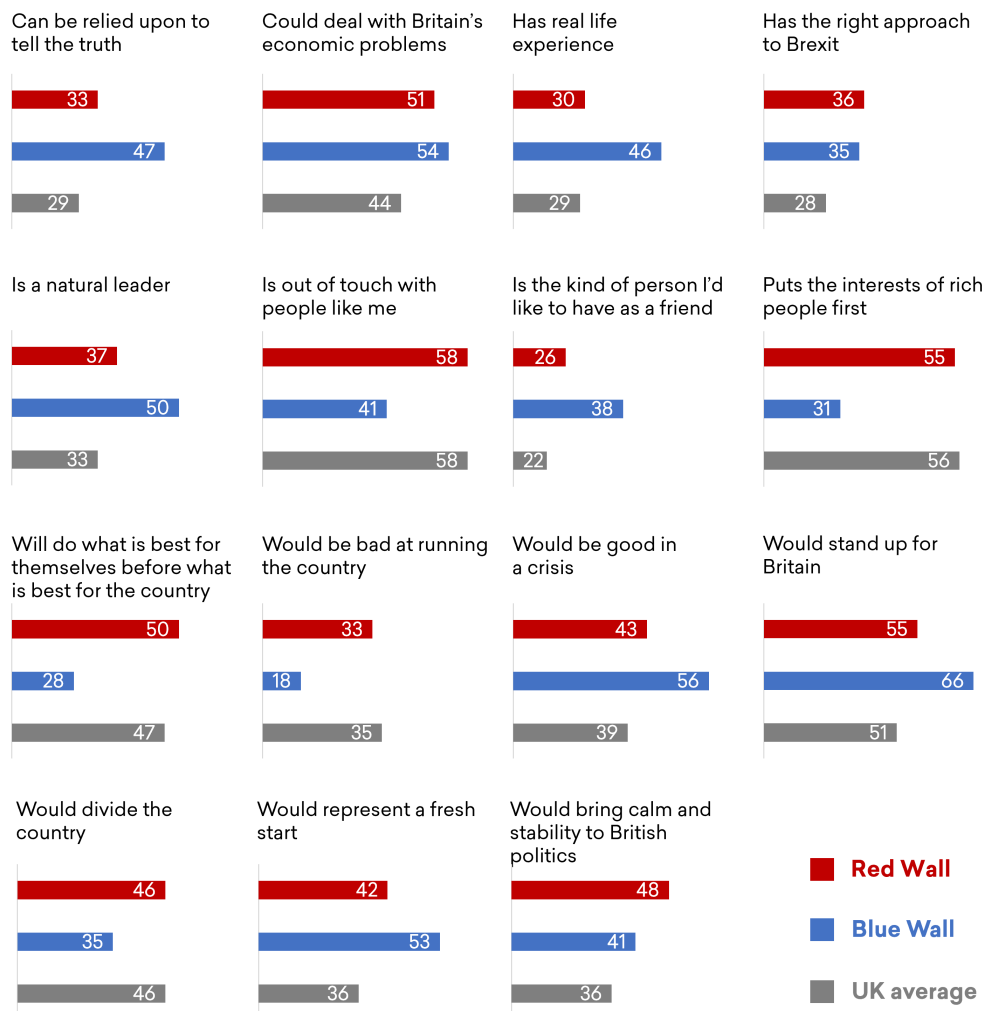

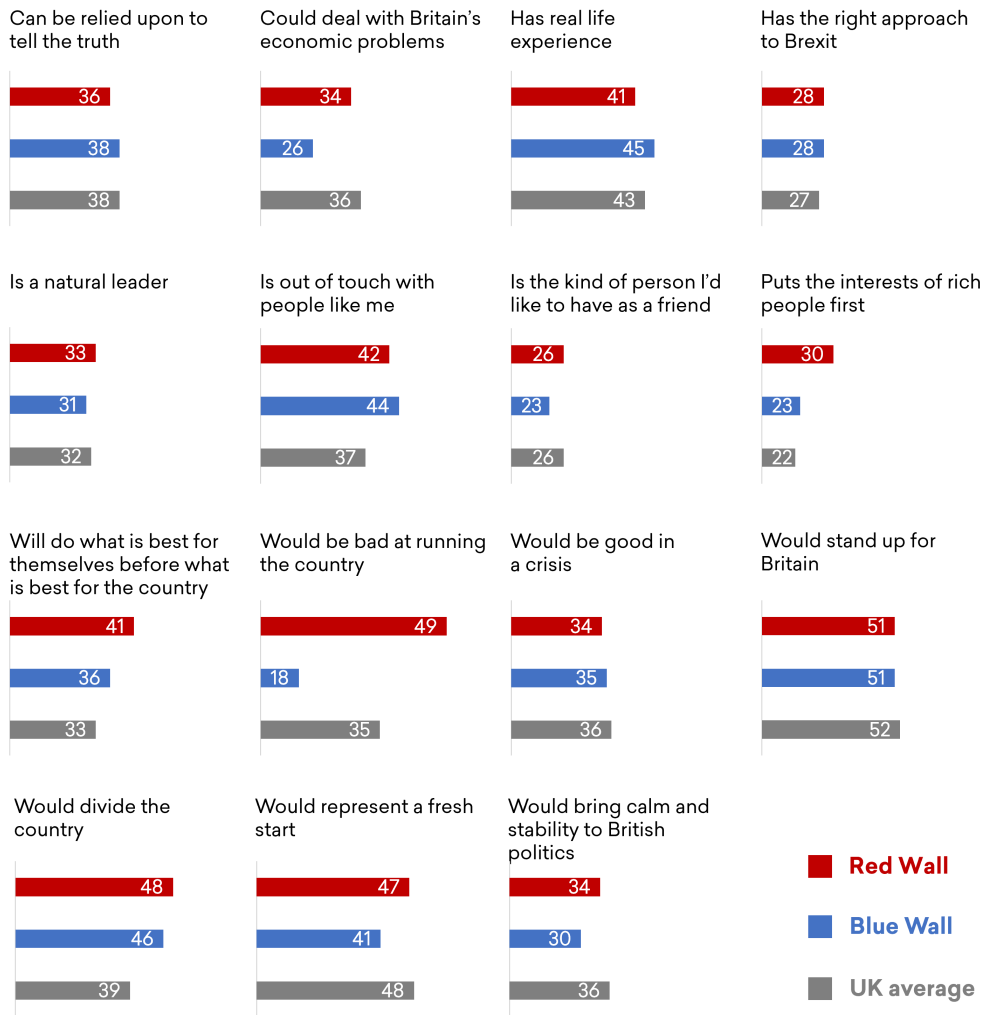|	Red Wall	Blue Wall	UK average
Can be relied upon to tell the truth	33	47	29
Could deal with Britain's economic problems	51	54	44
Has real life experience	30	46	29
Has the right approach to Brexit	36	35	28
Is a natural leader	37	50	33
Is out of touch with people like me	58	41	58
Is the kind of person I'd like to have as a friend	26	38	22
Puts the interests of rich people first	55	31	56
Will do what is best for themselves before what is best for the country	50	28	47
Would be bad at running the country	33	18	35
Would be good in a crisis	43	56	39
Would stand up for Britain	55	66	51
Would divide the country	46	35	46
Would represent a fresh start	42	53	36
Would bring calm and stability to British politics	48	41	36

Figure 1.11

Keir Starmer

Keir Starmer leads Rishi Sunak on many of the leadership characteristics with the general public and there are smaller differences between Red Wall and Blue Wall voters

Can be relied upon to tell the truth

- Red Wall: 36
- Blue Wall: 38
- UK average: 38

Could deal with Britain's economic problems

- Red Wall: 34
- Blue Wall: 26
- UK average: 36

Has real life experience

- Red Wall: 41
- Blue Wall: 45
- UK average: 43

Has the right approach to Brexit

- Red Wall: 28
- Blue Wall: 28
- UK average: 27

Is a natural leader

- Red Wall: 33
- Blue Wall: 31
- UK average: 32

Is out of touch with people like me

- Red Wall: 42
- Blue Wall: 44
- UK average: 37

Is the kind of person I'd like to have as a friend

- Red Wall: 26
- Blue Wall: 23
- UK average: 26

Puts the interests of rich people first

- Red Wall: 30
- Blue Wall: 23
- UK average: 22

Will do what is best for themselves before what is best for the country

- Red Wall: 41
- Blue Wall: 36
- UK average: 33

Would be bad at running the country

- Red Wall: 49
- Blue Wall: 18
- UK average: 35

Would be good in a crisis

- Red Wall: 34
- Blue Wall: 35
- UK average: 36

Would stand up for Britain

- Red Wall: 51
- Blue Wall: 51
- UK average: 52

Would divide the country

- Red Wall: 48
- Blue Wall: 46
- UK average: 39

Would represent a fresh start

- Red Wall: 47
- Blue Wall: 41
- UK average: 48

Would bring calm and stability to British politics

- Red Wall: 34
- Blue Wall: 30
- UK average: 36

■ **Red Wall**

■ **Blue Wall**

■ **UK average**

Keir Starmer, on the other hand, is viewed as more likely to represent a fresh start (48 per cent vs 36 per cent), is seen as less out of touch (37 per cent vs 58 per cent) and less likely to put his own interests before those of the British people (41 per cent vs 50 per cent) as well as having more real life experience (43 per cent to 29 per cent).

When asked if they would like to have Rishi Sunak or Keir Starmer as a friend, both party leaders receive low marks from the public.

Beyond the ratings across the public as a whole, the two leaders fare differently in the Blue Wall and Red Wall. Among Blue Wall voters, 47 per cent say Rishi Sunak is trustworthy and only 38 per cent of the same group say the same of Keir Starmer. Red Wall voters on the other hand are more likely, albeit from a lower base, to say that the Leader of the Opposition is more trustworthy (36 per cent) than Rishi Sunak (33 per cent).

As Figures 1.10 and 1.11 show, there are similar divides between the Blue and Red Wall voter on which leader represents a fresh start, who is more likely to serve their own interest rather than the country and who has real life experience. Rishi Sunak's ratings are consistently higher among Blue than Red Wall voters, whereas Keir Starmer's scores are much more consistent between both groups of voters.

The economic situation, and in particular the cost of living crisis, means that Rishi Sunak faces a particular challenge with Red Wall voters, who, as this polling and conversations in focus groups show, have a lingering worry that he doesn't understand their concerns and lacks the life experience to appreciate how difficult it is for many people right now.

The plain political challenge facing Rishi Sunak then is that while he is ahead of Keir Starmer on dealing with the economic crisis, he is behind on a series of empathy metrics, and among a public who are desperate for a fresh start, he is seen to represent more of the same.

"I mean like a lot of people are worried if they're going to be able to afford their mortgages in the next year. Rishi is richer than the King, you know. I mean it's one of those things. Can he really have that real life insight, I don't know?"
Tom, Loyal National, Middelsbrough

"From a financial point of view, Rishi is not representative of the country right now, and it's quite hard to see someone like that in power. All MPs are wealthy, but he has got significant wealth and obviously he's gonna try and sort the economy out. He's doesn't seem like a 'people's person' it seems like he's gonna look after himself and the people around him"
Jess, Loyal National, Dudley

The Autumn Budget is likely one of the Prime Minister's last opportunities to dispel these views among Red Wall voters.

While Keir Starmer is clearly ahead in the polls work, there is also no doubt that work remains to be done to consolidate this support. Despite Labour's leads, in focus groups the verdict on the Leader of the Opposition ranges from lukewarm to the completely unconvinced.

"I think Keir Starmer is a lovely man, but he's the most indecisive person I've ever heard. He still has not come up with any sort of policies whatsoever. Boris

was a dreadful man, but he got things done. Starmer is a lovely man, but gets nothing done"

Mike, Loyal National, West Brom East

"He seems like a nice bloke, safe pair of hands. Put him in the hot seat, you'd have to see at that point what he would do. I mean, comparable to what's on the other side of the benches, I'd take him every day, to be honest"

Jordi, Loyal National, West Brom East

"He's just unremarkable. He doesn't say, he just makes a noise. He doesn't actually say or commit to anything"

Mona, Loyal National, Don Valley

"If he can get Gary Neville to support the Labor Party, he must be doing something right, and that's serious because Gary Neville was a Tory"

Des, Established Liberal, Altrincham and Sale West

1.4. Why not vote Tory?

Figure 1.12

Reasons for no longer voting Conservative
Illegal immigration, economic factors and the desire for a fresh start explain why many are no longer voting Conservative

Reason	Value
The Conservative Party hasn't stopped illegal immigration such as channel crossings	24
The Conservatives are not taking cost of living seriously enough	23
They're incompetent	21
The actions and decisions by Liz Truss during her time as Prime Minister	18
We need a fresh start	17
Conservative policies have damaged the economy	17
I would probably still vote Conservative, but I'm not sure	16
The Conservatives haven't delivered on their promise to 'level up' deprived parts of the…	15
I do not believe Rishi Sunak is the right person to be Prime Minister	13
The Conservatives are more interested in fighting culture wars than dealing with real…	11
Public services have got worse under the Conservatives	11
Revelations about Downing street parties during the Covid lockdown	10
They've become too woke	9
The Conservatives have become too heartless	9
The UK has left the European Union	9
Jeremy Corbyn is no longer the leader of the Labour Party	8
The Conservatives are abandoning their policies on protecting the environment and…	8
The Conservative Party has failed to tackle crime	6
I trust another political party more now	5

What is driving 2019 Conservative voters to shift away from the Tory party? Three main factors are at play.

- By a narrow margin, the top reason selected by former Tory voters for leaving the party is the perceived failure by the Conservatives to tackle illegal immigration.

- But beyond immigration, the responses are primarily related to economic policy and handling. A perceived lack of seriousness in tackling the cost of living crisis, incompetence and the decisions taken by both the Truss administration and previous Tory administrations stand out.

- Third, and perhaps most ominous for the Conservatives, is a growing sense among the public that Britain needs a fresh start. This chimes with qualitative research which has consistently shown this desire for a fresh start for Britain, which many consider to be 'broken' today. In focus group after focus group, the public describe

Britain today as 'shambolic', 'chaotic', 'a mess', or as one participant in Middleton described 'we've gone from Great Britain to just Britain'

"So normally I'm very conservative through and through, and my family is too, and I still am, but I do feel like we need a bit of a shake up, let's see how Rishi does"

Emily, Loyal National, Dudley

"The Conservatives have been in power for 12 years...so it would be nice to have something fresh"

Chris, Loyal National, Dudley

"There's been a Conservative government for a long-time now, it's not delivered what was meant to be delivered, nothing's gone particularly well, so let's see what would happen with a change of government"

Elizabeth, Loyal National, Dudley

The Autumn Budget offers Rishi Sunak a chance, perhaps the last chance, to turn things around with the voters who are abandoning the Tories in high numbers. The following section explores who voters blame for the crisis and what they want the Tories to do about it.

Section 2: The Blame Game - who do the Tory Tribes blame for our economic difficulties?

2.1. A Tory problem not just a Truss problem

By a margin of two to one the public blame the government (61 per cent) rather than global factors (29 per cent) for the current economic situation. But strikingly, those holding the government responsible are more than twice as likely to say that they are the result of the actions of the UK government in recent years (41 per cent) than of the six-week Truss premiership (20 per cent). This suggests the public opinion challenge for the Autumn Budget goes beyond simply apologising for what happened under Liz Truss and un-doing that administration's agenda.

Figure 2.1

What has caused the UK's economic difficulties?
Most hold the UK government responsible for our economic difficulties – only one in five blame the Truss administration. Established Liberals and Backbone Conservatives are much more likely to think it is caused by global factors outside of the UK government's control
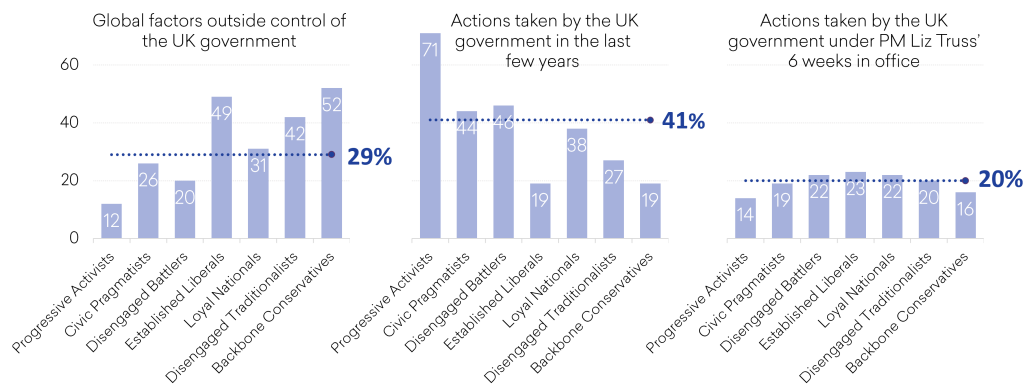
Underneath these averages, there are differences among the British Seven segments on what's caused the current economic turmoil and who is to blame:

- The core Conservative voters (Backbone Conservatives) are most likely (52 per cent) to agree with the government that most of the economic headwinds are from global factors outside their control. Interestingly, around half (49 per cent) of typical blue-wall voters (Established Liberals) also agree.

- In contrast, typical Red Wall voters (Loyal Nationals) are most likely to attribute the UK's economic difficulties to the actions of the Conservative government in recent years (38 per cent) and much less likely than other Conservative voting segments to agree that global factors are responsible.

"Wasn't the cost of living and everything, it was going up anyway, wasn't it, even before everything with Ukraine, which is thanks to the Tory government"

Nicky, Loyal National, Long Eaton

"I think it is just that they don't communicate, and things don't get rolled out properly. A lot of them say they want to do things that never actually get done"

Carly, Loyal National, Don Valley

"I think they all talk the talk don't they, until they get into power and the proof is in the pudding. We saw it with Brexit didn't we, they told people what they wanted to hear, but then didn't deliver. I can't remember a time when it's felt as bad in this country, it feels really ominous at the moment and I think it will get worse before it gets better"

Zoe, Loyal National, Stoke

2.2. Blame for the cost of living

While the public recognise that the rising cost of living has a number of drivers such as re-opening from Covid and Russia's invasion of Ukraine, they blame the Government for its failure to get a grip on the cost of living early enough and to provide enough support. For many people, the Government response has been 'too little too late'.

More than a year ago, More in Common watched the then-Chancellor's Autumn Statement and Spending Review with a group of Red Wall voters in the constituency of Rother Valley. Despite Rishi Sunak's optimistic tone, it was clear that the cost of living was already starting to have an impact on this groups personal finances long before Government support packages emerged.

"It's just the little things. I just bought a bag of Doritos. They used to be a quid. They're £1.25 now. And I know it's only 25p, but on everything? And what annoyed me is my son's ate them all, before I even got one"

Debbie, Loyal National, Blackpool South

Over the summer, Red Wall voters in particular questioned whether Rishi Sunak understood how difficult things were for hard working families up and down the country. Fairly or not, his personal wealth, image gaffes such as wearing Prada shoes to a building site, and revelations about his family's tax affairs contributed to an image that during a cost of living crisis the then former chancellor, could not relate to their struggles.

Polling throughout the last year tells a similar story. Concern about the cost of living has doubled since this time last year, with three quarters of the public now rating it as a top issue facing the country. Even after multi-billion pound support packages were announced by the government, the number saying that 'too little' was being done about the cost of living has remained at around six in ten. In part, this is because whatever the Government does people are still going to feel the pinch. But the sense that not enough is being done has been exacerbated by poor

communications[3] and the feeling that even where the Government has been offered more support it has been because they have been forced into it at the last minute.

Figure 2.2

Britons' top issues: Cost of Living

Cost of living is overwhelming top issue in our issue tracker and has risen 39 points in the last twelve months. Climate change and the NHS have remained consistently high concerns
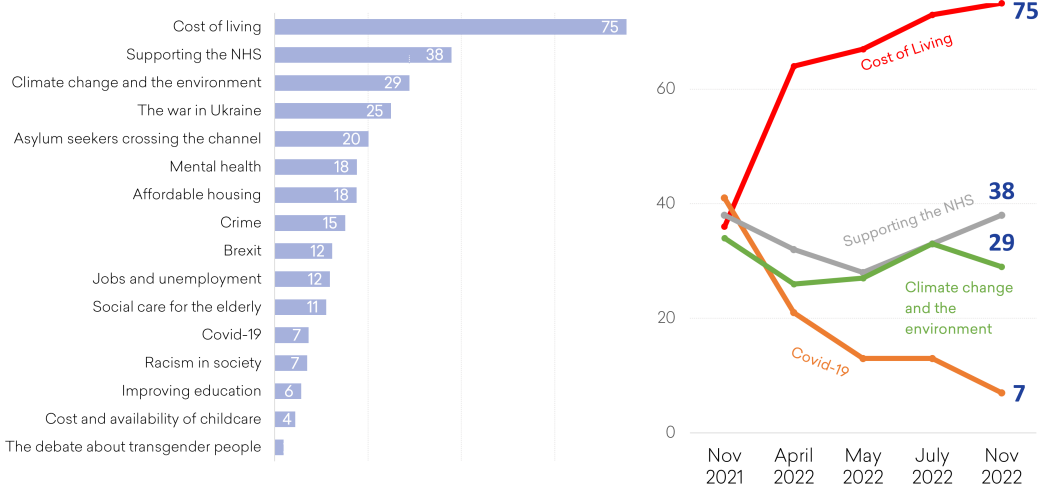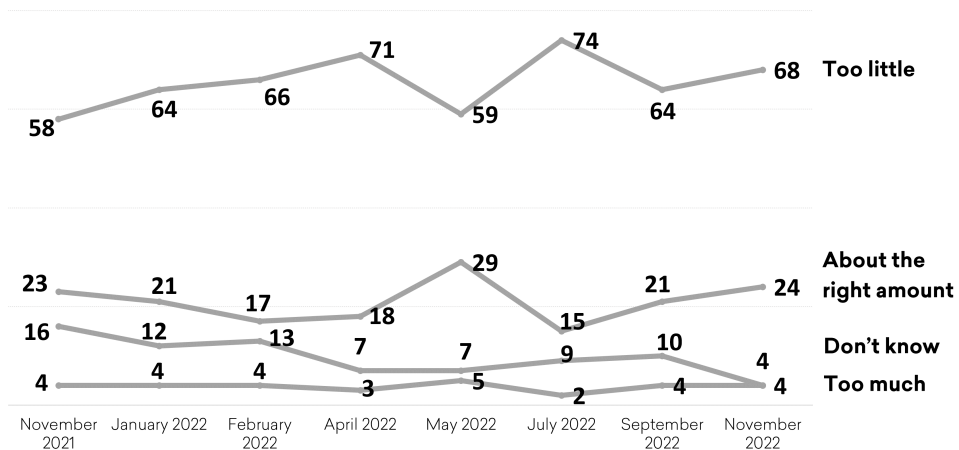

Figure 2.3

Cost of Living over time

The feeling that the 'too little' was being done on the cost of living grew significantly over the start of 2022. There were slight dips in May and September, suggesting government support packages had an impact on public attitudes, but this had risen again in November

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[3] This is not entirely a problem of the Government's making, the death of HM Queen Elizabeth II on the day the package was announced undoubtedly made efforts to explain the support difficult, but after the end of the period of mourning, the public continued to say that they didn't understand the package and questioned whether the support would be enough.

However, as with the economy as a whole, voters are split on what the Government should do about the cost of living:

- Blue Wall voters do not think the Government should be doing more on the cost of living, 58 per cent say that the Government is either doing too much or the right amount. In focus groups, Blue Wall voters are the most likely to say that they worry about the implications for the UK's public finances of ongoing support and subsidies.

- In contrast, 70 per cent of Red Wall voters say that too little is being done about the cost of living and want further action.

- Red Wall voters are also the most likely to say that they do not think the cost of living crisis will ever end (41 per cent) compared to Blue Wall voters of whom just 18 per cent think the crisis won't be resolved in the next few years.

- The public split 60:40 on trusting Labour over the Conservatives to deal with the cost of living crisis. But Blue Wall voters are more likely to say that they trust the Conservatives 58 per cent to 42 per cent than Red Wall voters who trust the Labour Party 53 per cent to 47 per cent.

Figure 2.4

When will the cost of living crisis end
Britons are pessimistic. Few think the cost of living crisis will end next year. A plurality say sometime next year, and a significant minority say "I'm not sure if it will ever end", this feeling highest among Red Wall voters
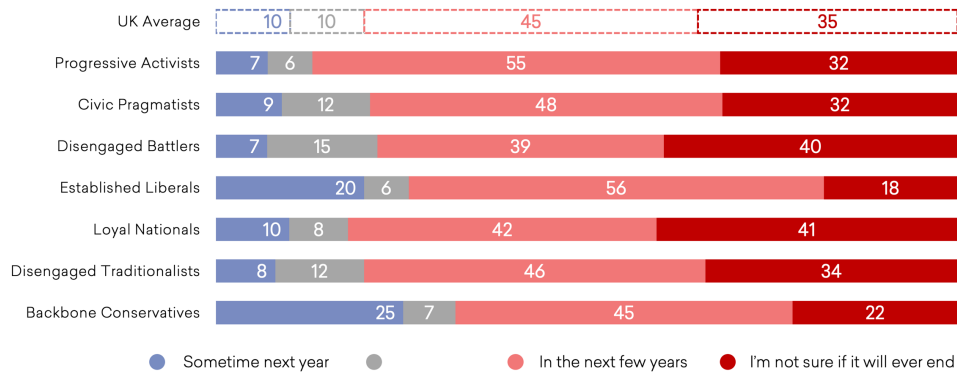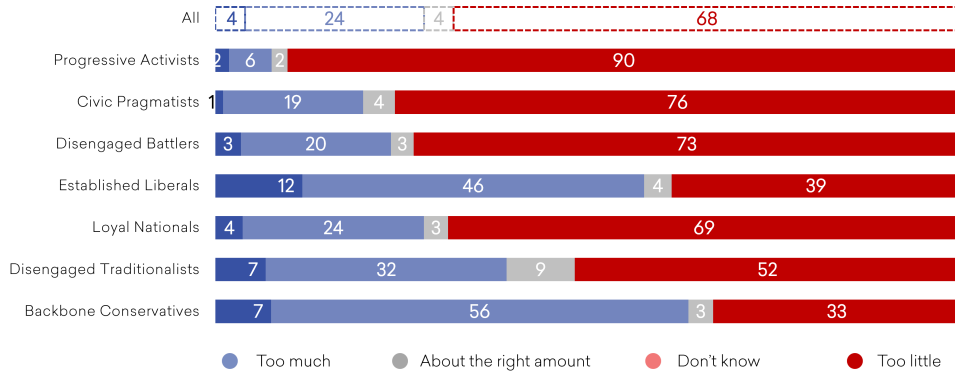
Figure 2.5

Is enough being done to support people?

There are clear differences between Red Wall and Blue Wall segments about whether too little is being done about the cost of living, or whether we are getting the level of support 'about right'

	Too much	About the right amount	Don't know	Too little
All	4	24	4	68
Progressive Activists	2	6 / 2		90
Civic Pragmatists	1	19	4	76
Disengaged Battlers	3	20	3	73
Established Liberals	12	46	4	39
Loyal Nationals	4	24	3	69
Disengaged Traditionalists	7	32	9	52
Backbone Conservatives	7	56	3	33

These diverging views on what the Government should do about the cost of living crisis can also partly be explained by how the different segments are experiencing the rise in prices. Established Liberals tend to be a wealthier group, and while they are feeling the pinch, they are much more shielded from the worst effects of inflation. Loyal Nationals, on the other hand, are more likely to say that, while they are, mostly, not having to choose between heating or eating, they have had to cut out many of the 'extras' such as eating out or activities for their children.

"I think for me it's like money's never been like a massive issue, I've been able to live and if I wanted to have a meal out and go on holidays, but that's kind of being taken away now so it feels like it's all work that you can't really plan for any fun and joy anymore because you're concerned that you need the money to pay bills and put food on the table"

Zoe, Loyal National, Stoke

"I would say it is affecting me, because I feel like obviously, I've changed from job to job, and I'm earning more money as I go from job to job, but it just feels like I'm working to pay the bills. And certain things that may be seen as luxury, is not a luxury to me. I like to go on holiday. I like to go out and eat with my friends. But now I'm having to be a bit more careful, because just day-to-day living, electricity, et cetera, is just increasing"

Moni, Loyal National, West Brom East

"We normally use a hot tub all over summer, we just haven't even bothered getting it out and using it this summer and that's saved just like loads of money - so we've just cut that out of our lifestyle"

Steven, Established Liberal, Reading

These differences in experiences, combined with the more general fiscal conservatism of Blue Wall voters, help to explain why they are more likely to favour longer term investments in energy saving and energy efficient technology than direct support payments.

"Any political party that has a longer term view rather than this me, me, me, selfish, bail me out, this you view is somebody that will get my vote"

Simon, Established Liberal, Guildford

"Rather than giving money, you could actually upgrade the infrastructure in the housing in the country and save money that way"

Tom, Established Liberal, Witney

"I'm all for reducing my carbon footprint, I would happily do whatever I could. But I don't think they make it easy for you, I'd love solar panels, but I can't afford them"

Chantelle, Loyal National, Long Eaton

"I think that we should be doing more on climate. I look at all the new houses that are being built at the moment, they're flying up everywhere, and I just think the government should be making these companies so the house is a bit more sustainable in terms of they should be putting solar panels on, and you know other things that you can be doing to put in your house, that that again reduces the people's costs that are living there, so it's not you're not getting hammered every time every which way. I think there's lots of stuff we could be doing more wind farms and stuff like that"

Mark, Loyal National, Stoke

2.3. Covid's long tail

Alongside the cost of living, the economic impact of Covid remains a topic of conversation in focus groups. While there is no doubt that the public think Rishi Sunak did the right thing by introducing the furlough scheme, and give him real credit for it, they are now worried about the pandemic's price tag.

"The money that we've shelled out during COVID's got something to do with rising energy bills, hasn't it? There seemed to be a bottomless bit of money for everybody, grants loans and furlough. And I can't imagine HMRC would be able to check on everybody's furlough and all the grants and the loans to check that they were all valid"

Nic, Established Liberal, Altrincham and Sale West

Unlike many other areas of public spending, the sheer quantum of spending on tackling the pandemic has cut through with the public. This has had two paradoxical effects. On the one hand, the public want to know how we are going to pay back the 'Covid Debt' and turn off the money taps – especially in the Blue Wall. On the other hand, the lesson many Red

Wall voters have taken from the pandemic is that if the Government really wants to find the money to do something it can do it. Again, the Government finds itself presented with two contradictory narratives on public spending.

The public do accept however that reopening from Covid has in part been one of the driving forces for higher inflation. 39 per cent think the impact of Covid-19 is partly responsible for the UK's economic situation – this was the fourth highest selected explanation from a list of 15 options. But in recent focus groups, participants increasingly tell us they wonder, more than a year on from post-pandemic reopening, why its effects are still persisting.

"One of my main worries is like Gareth just said, there is already a bill for COVID there pre-existing. It's not gone anywhere. It's still there. And the reason why all these costs are going up now is because of COVID is an avalanche effect and now they're saying they're going to try and cut costs and try to limit and cap them. That's going to do the exact same thing again for next year, and the bill for next year is going to be... They're still going to be there, but it's going to be twice big. It's going to consistently be an avalanche effect of just cutting costs, but eventually there's still going to be a bill that someone has to pay"
*Jacob, Established Liberal, Witney*

2.4. The impact of Russia's invasion

Along with Government decisions and the impact of Covid, almost half of the country think that Russia's invasion of Ukraine is partly responsible for the economic difficulties we face in the UK. For Established Liberals, this rises to almost three in five (59 per cent).

Figure 2.6

The impact of the war in Ukraine
Although the public blame the Government for our economic problems, they are also most likely to say the war in Ukraine is responsible
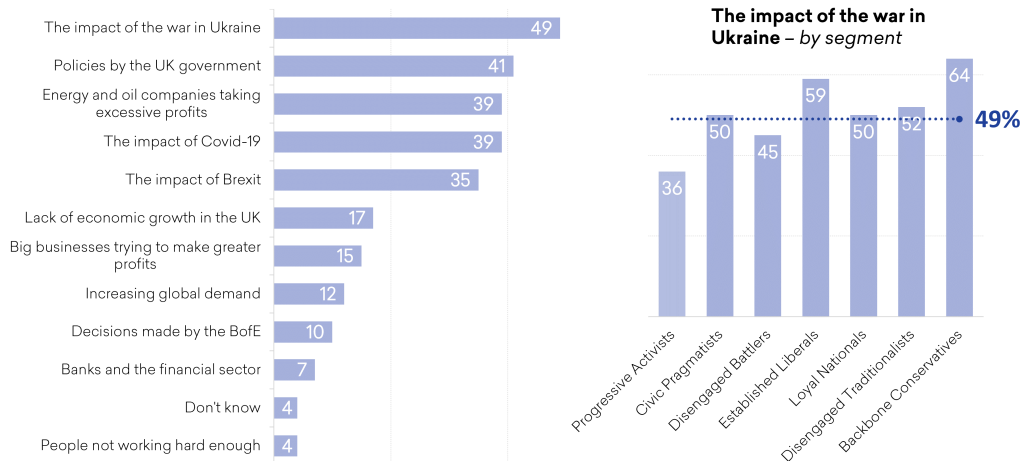
However, despite the economic cost of Russia's invasion, there is very little appetite among the public for the UK to scale back its military and economic support for Ukraine.

Six in ten people say it is right that the UK supports Ukraine "even if it makes life harder for us here in the UK" (60 per cent) versus only a quarter who say our support would be wrong "if it makes life harder here in the UK" (26 per cent). That support for Ukraine, notwithstanding the costs, is even stronger (65 per cent) among those who said they'd still vote Conservative at the next election.

What's more, almost two thirds of the public (64 per cent) believe that the UK should continue to support Ukraine at least until it has won back all of the territory it has lost since Russia's invasion earlier this year a number – while only 8 per cent would like to see the UK stop its support for Ukraine now. There is very little difference between the Red and Blue Walls in their level of support for Ukraine.

Figure 2.7

Supporting Ukraine even if makes life harder here

Support for Ukraine, even if that means making sacrifices here in the UK, remains strong – particularly for the typical Blue Wall voters
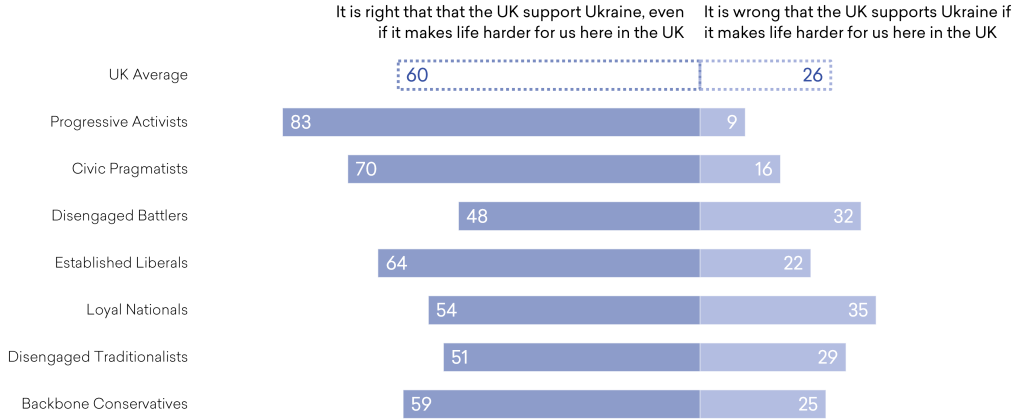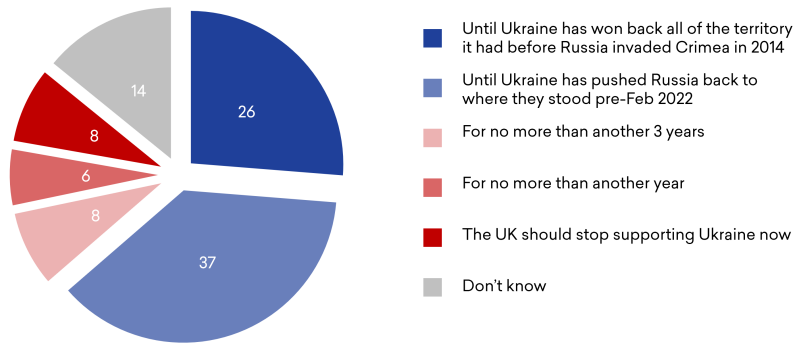
	It is right that that the UK support Ukraine, even if it makes life harder for us here in the UK	It is wrong that the UK supports Ukraine if it makes life harder for us here in the UK
UK Average	60	26
Progressive Activists	83	9
Civic Pragmatists	70	16
Disengaged Battlers	48	32
Established Liberals	64	22
Loyal Nationals	54	35
Disengaged Traditionalists	51	29
Backbone Conservatives	59	25

Figure 2.8

For how long should the UK keep supporting Ukraine

Almost two thirds of Britons want the UK to continue support Ukraine until it has won back all the territory it had before the Russian invasion in February 2022

- Until Ukraine has won back all of the territory it had before Russia invaded Crimea in 2014 — 26
- Until Ukraine has pushed Russia back to where they stood pre-Feb 2022 — 37
- For no more than another 3 years — 8
- For no more than another year — 6
- The UK should stop supporting Ukraine now — 8
- Don't know — 14

2.5. A distracted Government

Beyond Ukraine, cost of living and Covid, the public consistently express frustration at the government's failure to get a grip on the big challenges facing the country. The reaction to the chaos during the short-lived Truss administration was one of bewilderment.

"I feel it's made a mockery out of Parliament, Westminster and the system - having leaders come, leaders go, Chancellors as well. You think, are they really well equipped in Parliament or any party to run the country? We've lost our confidence, well I have anyway, in the government as a whole, as a responsible institution. It's just who's next - how credible will they be? We haven't got the type of people we need in power"

Lisa, Loyal National, Oldham

"On my side after all this, trust is gone now. There's just so much to fix and it's going to take a long time to fix, and it is worrying"

Sarah, Loyal National, Oldham

But the public also think the Government has been distracted for a long time, and are frustrated that the partygate scandal consumed so much energy. Indeed Red Wall voters in particular seemed much more willing to give Boris Johnson a second chance if he had just owned up to what happened and apologised. But by the summer they were just as keen as other groups for the Prime Minister to go to allow the country to move on.

"I did quite like Boris, but I think with all the bad PR, I've lost confidence in the guy"

Craig, Loyal National, Stoke

"I would've voted no confidence because we've got other stuff we need to be focusing on. And all the attention and effort seems to be going on that stuff that doesn't massively benefit anyone or matter. So if he wasn't there, it would be more focused on important stuff"

Tom, Loyal National, Wakefield

"And if I voted on Monday, I think I would've no confidence because just all this partygate and all the scandals just makes me think I don't trust the prime minister. And there's just so much distraction from what he should be doing. I don't trust that he won't end up getting himself into further bother that causes even more distraction in the future"

Darren, Established Liberal, Esher and Walton

Section 3 - The Tory Coalition and the economy

While there is widespread recognition of the economy's parlous state, there is less consensus on what should be done about it. The different values and starting points of the British Seven segments lead them to different solutions to our economic challenges.
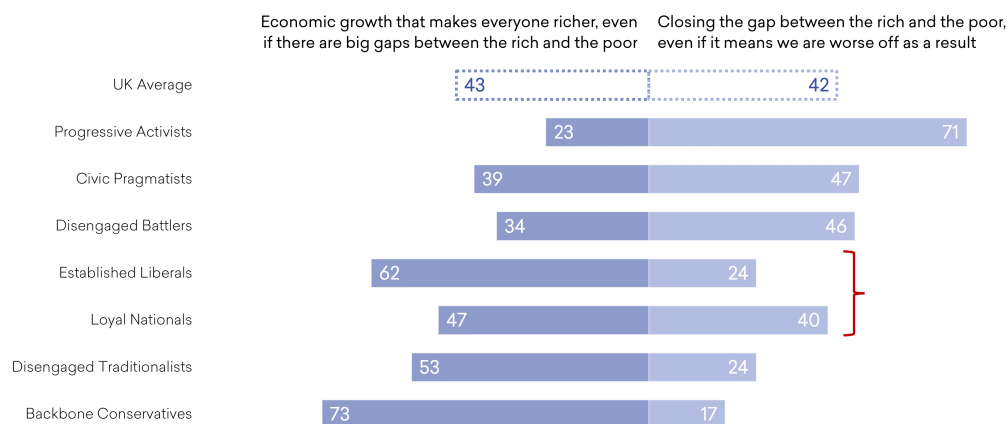
3.1. What's more important - growing the economy or tackling inequality

When faced with the binary choice between growing the pie or sharing it out more evenly, the public are evenly divided. 43 per cent say that we should prioritise economic growth over tackling inequality, 42 per cent say tackling inequality should be the priority over economic growth. However, there are differences between the segments' preferences on this question.

Figure 3.1

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
UK Average	43	42
Progressive Activists	23	71
Civic Pragmatists	39	47
Disengaged Battlers	34	46
Established Liberals	62	24
Loyal Nationals	47	40
Disengaged Traditionalists	53	24
Backbone Conservatives	73	17

The strongest support for putting economic growth first comes from the traditional Conservative base of the Backbone Conservatives and Established Liberal; Blue Wall voters. While Red Wall voters are slightly more likely than average to opt for economic growth, they place a much higher premium on tackling inequality than traditional Tory voters.

This tallies with both our polling and focus group research during the Conservative leadership election which found support among the Conservative base for Truss' growth narratives, and openness to trying some of the pro-growth policies of her platform. By the time of the mini-budget, the public ranked increasing economic growth as one of the most

important public priorities. In September, 'Generating economic growth' rose to the second highest priority, the highest ever level on our tracker.

Figure 3.2

Generating economic growth
Previous research found that 'generating economic growth' had gained increasing prominence since the start of 2022
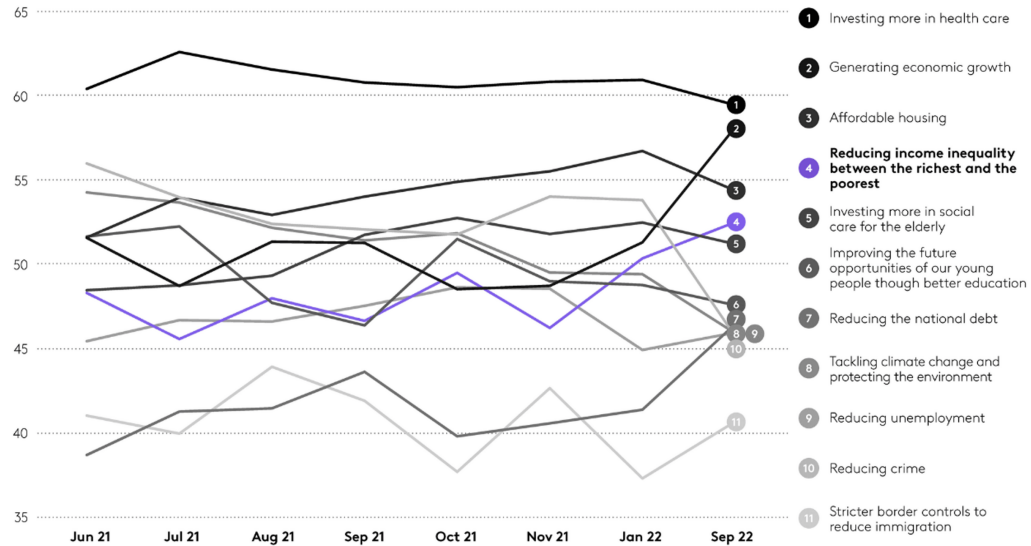
But Red Wall voters did not like what they saw as pro-growth measures that were only directed at the rich like the abortive attempt to cut the 45p rate and plans to remove the cap on bankers' bonuses. Instead they were much more likely to favour tax cutting measures which put more money in their pockets such as the (also now abandoned) proposal to cut the 20 pence rate and the reversal of the National Insurance rise.

However the approach of the mini budget and the resulting economic collapse has undoubtedly shifted the public's view of this platform. While Conservative voting segments still prioritise economic growth over tackling inequality, they seem, in our focus groups, much more averse to measures that could increase the deficit.

"They're speaking the speak, but when you actually question them about how they're going to pay for things and how things are going to happen, Conservatives and Labour are the same, they don't have an answer. It's all talk to get people to vote for them. But actually, when it comes to the pounds, shillings, and pence, they don't have an answer. They avoid answering every single question. How are you going to pay for that? "Well, blah, blah, blah, blah." No, how are you going to pay for it? They don't have the answers"
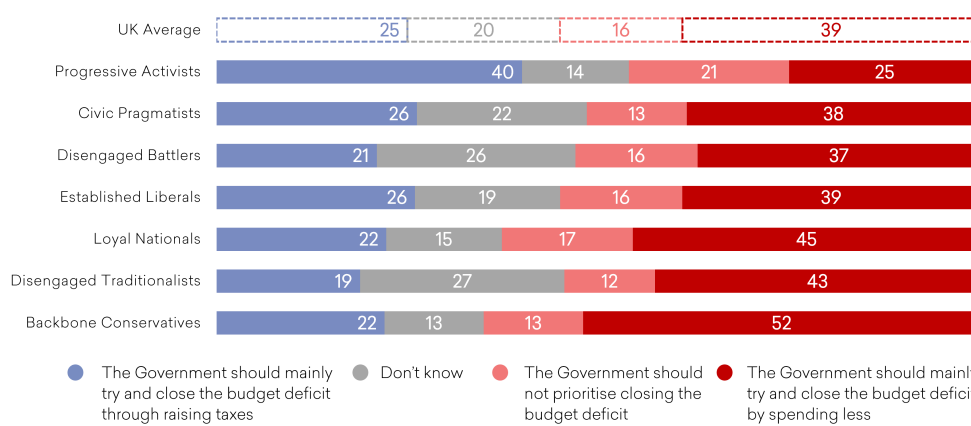
Shelley, Loyal National, Don Valley

3.2. How to close the budget deficit?

The overwhelming majority of the public, across all segments, believe closing the deficit is a priority – only 16 per cent of the public would choose not to do anything to reduce the deficit.

Figure 3.3

How to reduce the budget deficit – tax rises or spending cuts?
Most of the public think action should be taken to close the budget deficit – and more prefer spending cuts over tax rises

	The Government should mainly try and close the budget deficit through raising taxes	Don't know	The Government should not prioritise closing the budget deficit	The Government should mainly try and close the budget deficit by spending less
UK Average	25	20	16	39
Progressive Activists	40	14	21	25
Civic Pragmatists	26	22	13	38
Disengaged Battlers	21	26	16	37
Established Liberals	26	19	16	39
Loyal Nationals	22	15	17	45
Disengaged Traditionalists	19	27	12	43
Backbone Conservatives	22	13	13	52

The public's inclination, in the abstract, is to do this mainly by cutting public spending over increasing taxes. Only Progressive Activists disagree. In focus groups this preference is explained by people's assumptions that they will be more worse off because of tax rises. In contrast, the more abstract notion of cutting Government spending, is often taken to refer to bloated bureaucracies rather than frontline services. This in particular helps to explain why, after Backbone Conservatives, Loyal Nationals/Red Wall voters are the most likely to favour spending cuts.

## 3.3. Does the government have a mandate for cuts?

The public are more split on whether the Government has a mandate to cut public spending. The 2019 Conservative manifesto heralded the end of the period of austerity during the 2010s and did not suggest further spending cuts. As result:

- 44 per cent of the public think that because the government did not say they would cut public spending at the last election they have no mandate to do so now

- 37 per cent of the public think that the economic circumstances have changed so much so that the government is entitled to cut public spending now to deal with the deficit

Figure 3.4

Has the government got a mandate to cut spending?

The public are evenly split overall as to whether the government has a mandate to cut spending due to change economic circumstances – but there are stark differences between Red Wall and Blue Wall voters
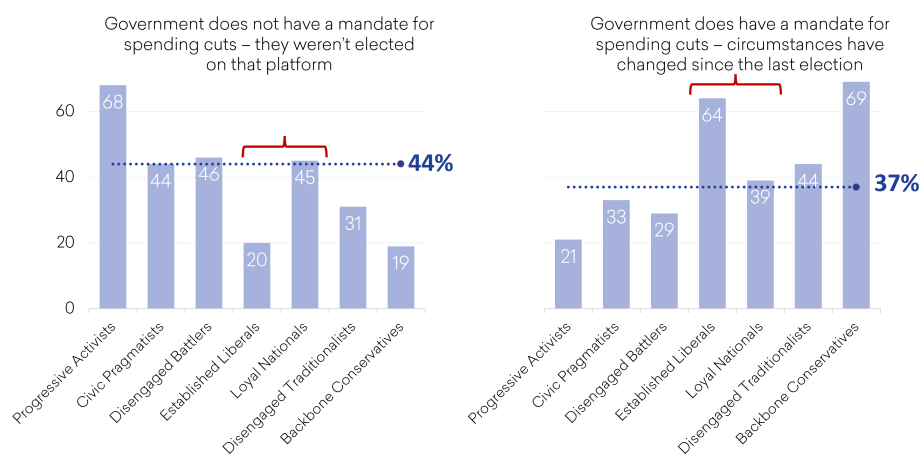
On the question of a mandate, there are again divides between Blue and Red Wall voters. Established Liberals, along with Backbone Conservatives, are the most likely to accept the argument that because the economic circumstances have changed since 2019 the Government is entitled to propose spending cuts. Only 20 per cent of Established Liberals say that the Government does not have such a mandate, compared to 64 per cent of these Blue Wall voters who think that it does. Red Wall voters, on the other hand, line up with the public at large in narrowly saying that the Government does not have a mandate for spending cuts.

There is no doubt that part of the attraction of the 2019 Manifesto for those Red Wall voters who lent their votes to the Tories at the last election was - as one Loyal National in Stoke described to us 'turning on the money tap at long last'. They don't think that promises and specifically Levelling Up can be done on the cheap (although they are happy to see money redirected from London and the South-East). For many of these voters, it will be difficult to reconcile Rishi Sunak's promise on the steps of Downing Street to deliver on the promise of the 2019 Manifesto at the same time as imposing another round of austerity.

Even before considering specific measures to either save money or raise revenue, the overall framing of the Budget is one most stark of the choices that the Prime Minister and Chancellor face. On the one hand, Blue Wall voters want to see the party prioritise growth and sound finances, even if that means cutting spending and greater inequality. Red Wall voters however are much more divided and question whether spending cuts are compatible with the party's 2019 promises.

Section 4: The budget's balancing act

Section 3 outlined the broad principles that shape the different segments' starting points on the economy. This section explores how the public approach some specific spending and revenue raising measures that might be considered as part of the Autumn Budget. On a range of taxation, spending or cost of living related decisions the segment's starting points are shaped by their values.

4.1. Britons and Tax

While, as Section 3 showed, in the abstract there is a relatively strong preference for reducing the budget deficit through spending cuts rather than higher taxes. This is not the case when it comes to choosing specific measures to do so. When asked to select three options from a range of measures that would tackle the deficit, tax raising policies enjoy more support across the board than spending cuts.

By far the most popular revenue raising measure is the introduction of a windfall tax, followed by income tax increases on high earners and increasing corporation tax.

Again, there are differences between the two flanks of the Tory coalition.

While Blue Wall voters are only slightly less likely to support a windfall tax on oil and gas companies, they are much less likely to support increasing income tax for higher earners 22 per cent vs 38 per cent average, the lowest of any group, and less likely to support raising corporation tax.

Figure 4.1

Public support for increasing taxes
Three of the top five measures tested for closing the budget deficit are raising taxes on oil and gas companies, businesses and high earners
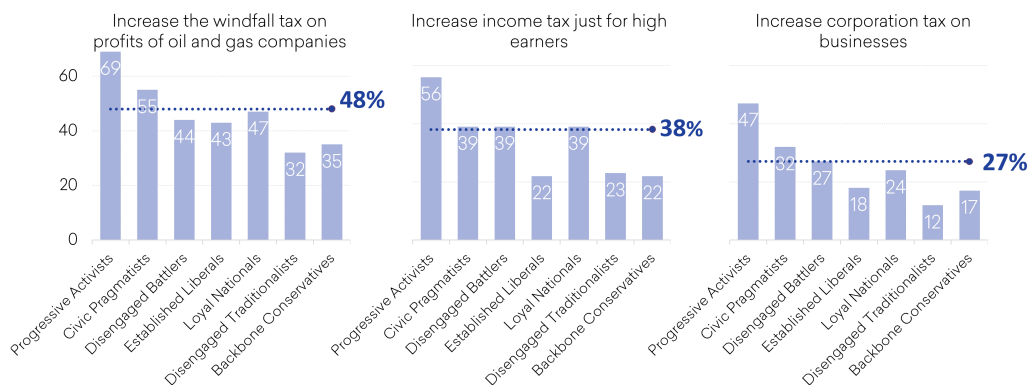
Red Wall voters, on the other hand, are the most supportive of these tax rises of any part of the Tory coalition, with 47 per cent opting for a windfall tax, 39 per cent for income tax rises and 24 per cent for a rise in corporation tax.

Figure 4.2

Low support for freezing thresholds or reinstating H&S levy
There is much lower overall support across the segments for freeze income tax thresholds or reversing the removal of the H&S Levy – these were ranked 7th and 10th out of a list of 15 options
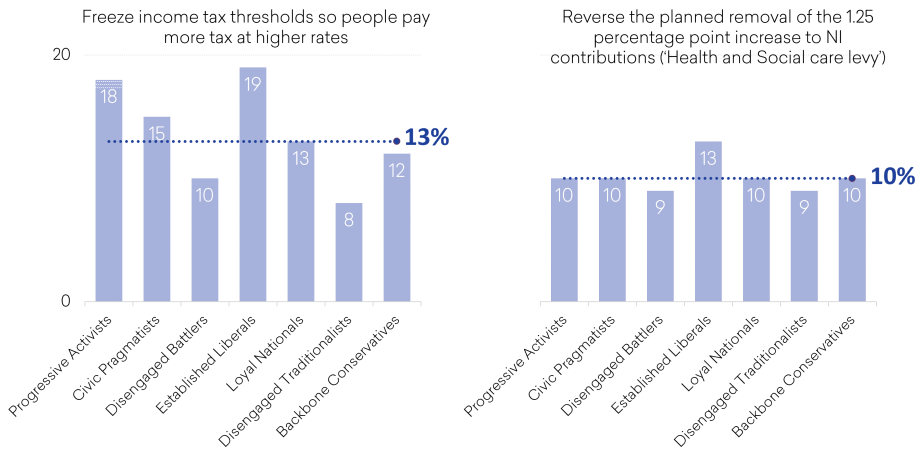

There is very low support across the board, among both Tory and non-Tory segments, for reimposing the Health and Social Levy and freezing income tax thresholds – this mirrors the polling throughout the summer Conservative leadership election which backed Liz Truss's plans to reverse the rise in National Insurance.

Figure 4.3

Health and Social Care levy
When we asked the question in July, by a 2 to 1 margin people thought the NI rise should be reversed
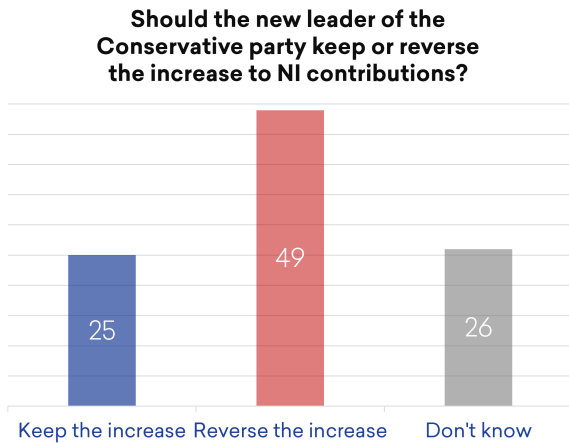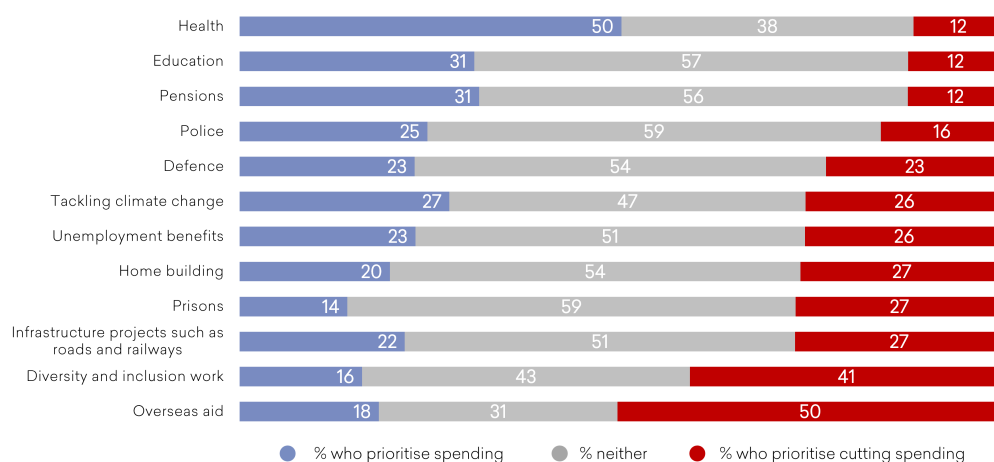
4.2. Britons and spending cuts

When it comes to the biggest areas of public spending, the public are reluctant to advocate spending cuts – instead preferring to cut those areas with smaller budgets.

Figure 4.4

Where do the public support spending cuts?
The public want to see health, education and pension spending ringfenced, and are prepared to cut budgets for overseas aid and diversity and inclusion

	% who prioritise spending	% neither	% who prioritise cutting spending
Health	50	38	12
Education	31	57	12
Pensions	31	56	12
Police	25	59	16
Defence	23	54	23
Tackling climate change	27	47	26
Unemployment benefits	23	51	26
Home building	20	54	27
Prisons	14	59	27
Infrastructure projects such as roads and railways	22	51	27
Diversity and inclusion work	16	43	41
Overseas aid	18	31	50

Presented with a series of forced choices about which areas of public spending should be cut or protected, MaxDiff analysis finds health, pensions and education are the areas the public most want protected from cuts. 38 per cent of the public prioritise protecting health spending every time they're forced to choose, 19 per cent do the same for pensions, 18 per cent do the same for education. The latter of these is arguably surprising given the relative lack of attention education has enjoyed in the policy debate of recent years. It also suggests the return of the Teaching Unions 2017 Anti School Cuts campaign would resonate with voters.
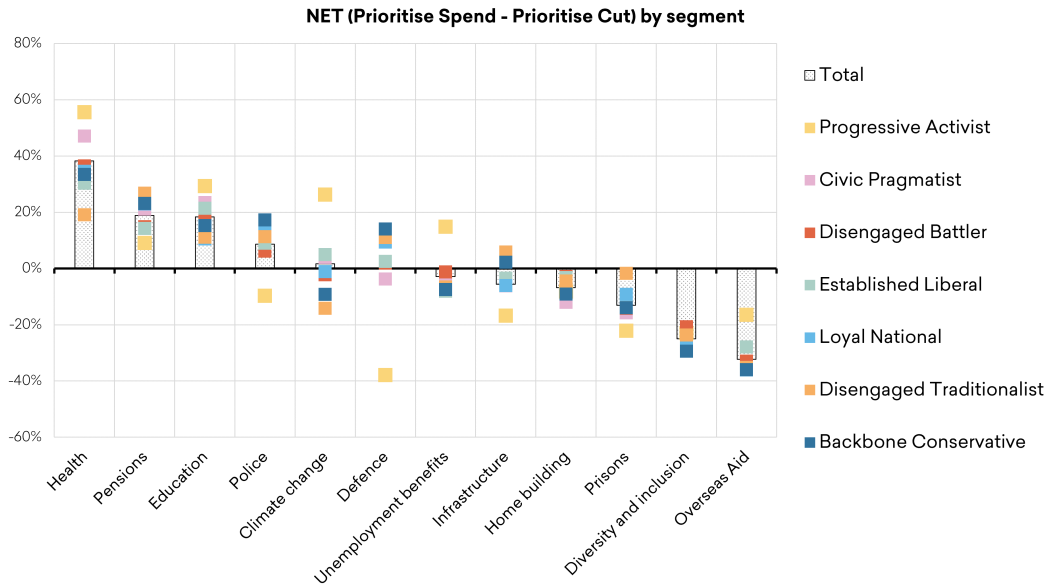
Only cutting spending on reducing overseas aid and cutting diversity and inclusion work command significant support (35 per cent and 25 per cent respectively). These are, of course, also among the smallest budgets, suggesting limited appetite for a round of deep spending cuts to public services.

Given recent debates on the need for supply side reforms to boost growth it is notable that the public prioritise spending on efforts to tackle climate change above home building or infrastructure investment.

Figure 4.5

Spending cuts – by segment
There are some key differences between segments over what areas they are prepared to cut

NET (Prioritise Spend - Prioritise Cut) by segment

Legend:
- Total
- Progressive Activist
- Civic Pragmatist
- Disengaged Battler
- Established Liberal
- Loyal National
- Disengaged Traditionalist
- Backbone Conservative

Beneath those top level findings, support for the relative protection of different areas of spending varies across the seven segments of the population:

- Progressive Activists are outliers – they prioritise ring-fencing the budgets of health, overseas aid, unemployment and tackling climate change much more than other segments, and are much more willing to cut spending on police, prisons, infrastructure and defence compared to other segments.

- There are subtle differences in prioritisation between typical Blue Wall and Red Wall voters. While both Loyal Nationals and Established Liberals would prioritise health and pensions Loyal Nationals also more likely to say police and Established Liberals more likely to say education.

- The Loyal Nationals desire to see police budgets prioritised reflects the fact that Red Wall voters are among the most worried about crime (more than one in two Loyal Nationals (53 per cent) say crime has gone up in their area in recent years, more than three times higher than Established Liberals.

- Established Liberals have the lowest threat perception. They are also among the most likely to think that the education system works for people like them (74 per cent) and to support further investment in the education system.

- Blue Wall voters also place slightly less of a premium on protecting defence spending than Red Wall voters, another function of the latter's high threat perception.

- Blue Wall voters express the second highest levels of support for prioritising investment on tackling climate change, Red Wall voters are relatively more likely to say such spending should be cut.

- Blue Wall voters are also less likely to want to see cuts to home building, perhaps reflecting the particular pressures in areas where they are most likely to live.

4.3. Pensions and benefits

Both pensions and benefits are major areas of public spending. With inflation running at modern highs, there has been much debate about the extent to which it is affordable or fair for these payments to be increased in line with inflation or earnings.
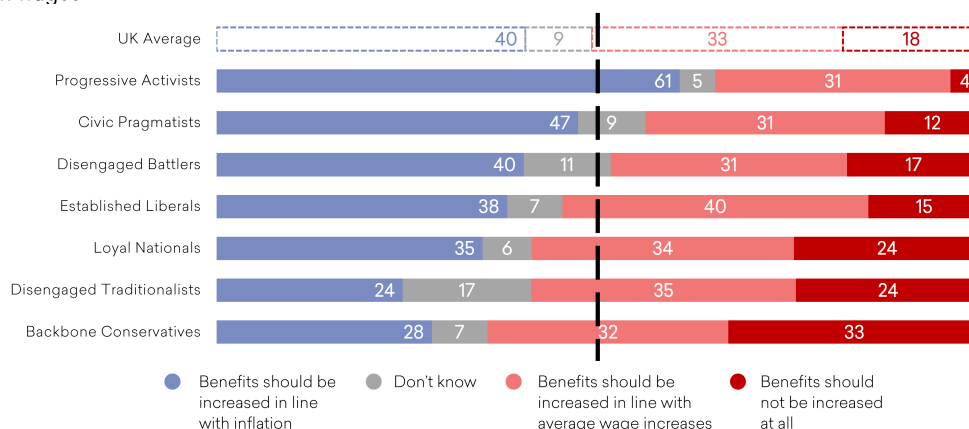
Increasing benefits

Most Britons (51 per cent) think benefits should either only be increased in line with wages (33 per cent) or not increased at all (18 per cent). Four in ten think benefits should rise in line with inflation (40 per cent). The only group where a majority support increasing benefits in line with inflation are Progressive Activists.

Figure 4.6

Increasing benefits
A majority of Britons (51%) think benefits should either not be increased at all or only increased in line with wages

	Benefits should be increased in line with inflation	Don't know	Benefits should be increased in line with average wage increases	Benefits should not be increased at all
UK Average	40	9	33	18
Progressive Activists	61	5	31	4
Civic Pragmatists	47	9	31	12
Disengaged Battlers	40	11	31	17
Established Liberals	38	7	40	15
Loyal Nationals	35	6	34	24
Disengaged Traditionalists	24	17	35	24
Backbone Conservatives	28	7	32	33

The proposal to not increase benefits at all is most popular with the core Conservative voting segment Backbone Conservatives (33 per cent of this group do not want to see any increases to benefits).

After Backbone Conservatives, it is Red Wall voters who are the most sceptical about raising benefits. A quarter of Loyal Nationals (24 per cent) think that benefits should not go up at all next year, while a further 34 per cent think that they should only go up in line with average earnings. Only a third (35 per cent) of Red Wall voters think that benefits should rise with inflation.

This feeling that benefit rises need to be capped has been explored in qualitative research with Red Wall voters. These groups often express their frustration that support is too often directed at those who are not working, while working people like them struggle. Red Wall voters also worry that high benefits act as a deterrent to work and resent the non-contributory nature of benefits which does nothing to reward their hard work and loyalty.

"We get shafted left, right and centre in everything in the UK. Gas, electric, petrol, food. The government doesn't give us anything. We have to work hard. People on benefits, they're getting £650 payments. People are working hard and we're still getting no help"

Ali, Loyal National, Wakefield

"Wages shouldn't be inflation, because that's just going to cause more inflation. Because that's where inflation comes from. It's the Government printing money to pay their bills, and the more they spend, the higher inflation is going to go, they're just adding fuel to the flames"

Phillip, Loyal National, Dudley

"I'd increase by wages to be fair to the people who are working. Because I know people who are on minimum wage and they are struggling and they can't claim extra"

Jess, Loyal National, Dudley

"If someone is actually able to work and is not in a situation where they're not responsible for others that cannot look after themselves, they do have the ability to work, I generally think that it is fair for their Universal Credit to be deducted"

Cindy, Loyal National, West Brom East

Established Liberals (Blue Wall voters) are much less likely to say they think that benefits shouldn't go up at all (15 per cent) with 40 per cent saying they should rise with wages, and 38 per cent saying they should rise with inflation.

Across the Tory coalition then there is little appetite for above inflationary increases to benefits - at least without commensurate support for working people. There is also no doubt the lack of a contributory element to the welfare system compounds people's scepticism about increasing benefits.

Increasing pensions

Figure 4.7

Increasing benefits vs increasing pensions
The public are much more likely to support increasing pensions in line with inflation than benefits
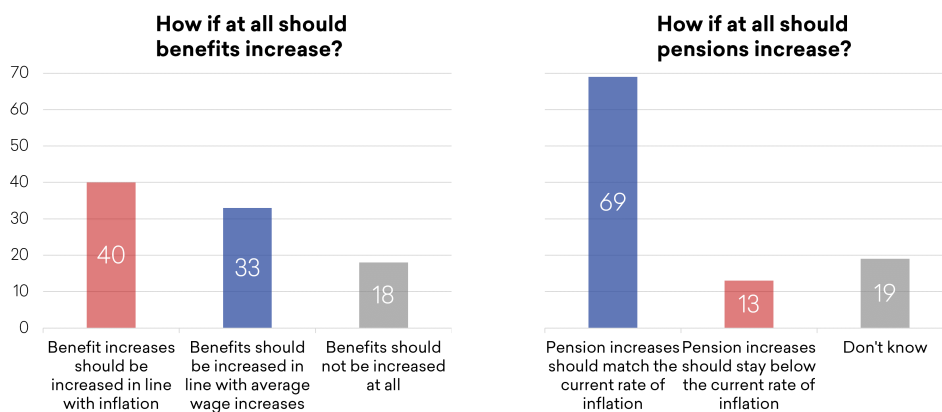
In contrast to benefits, public support for increasing pensions in line with inflation is far stronger - and is highest among Red Wall voters. In focus groups the public explain their reasons for the distinction.

- Pensioners have contributed throughout their working life and now deserve to enjoy a comfortable retirement supported by others.

- Most pensioners will be unable/struggle to work and as such have few other options available to them to raise extra funds to help them get through the winter.

- The cost of living will affect pensioners more, especially through the need to keep their homes warm this winter.

- There was greater empathy/social contact with pensioners. Many talked about their parents, grandparents or elderly relatives and friends who were pensioners. Few people had a clear image of the types of people on benefits and almost exclusively talked about employment related benefits recipients rather than those on disability benefits.

Conclusion

With the benefit of nearly three years of hindsight, it is clear just how striking the breadth of the electoral coalition that propelled the Conservatives to power in 2019 was. Much attention has been paid to the fall of the Red Wall, but it is just as remarkable that the Tories managed to win these new voters while holding onto voters in the Blue Wall. These voters are not natural bedfellows. One group are socially Conservative, have the highest levels of threat perception, and lean more left economically. The other group are socially liberal, have the lowest levels of threat perception, and lean right on economics.

The unlikeliness of that electoral feat also points to its instability. Fast forward to 2022 and the different wings of Tory voters want different things from the Government. From how the country approaches immigration and asylum policy, to how we restore economic credibility and tackle the cost of living, these two groups don't have one answer. At the same time, while there is no doubt that some degree of realignment has occurred, its pace and definiteness have been overstated. Voting intention remains volatile. Red Wall voters, who many commentators suggested would never vote for the Labour Party again, now say they will do, while the Tory Coalition in 2022 under Rishi Sunak resembles something more closer to how it was a decade ago, than at the last election.

That poses a profound dilemma to the Prime Minister and Chancellor as they devise their Autumn Budget. Do they choose to appeal to traditional Conservative voters by emphasising fiscal discipline and continue to shore up support in the Blue Wall? Or do they instead try and regain the more significant lost ground in the Red Wall, embracing tax rises on the wealthiest and big corporations and using the extra revenue to deliver on their promise to invest in public services and level up the country? The danger for Rishi Sunak is that neither route alone is enough to deliver a future election victory. Post Brexit, there are simply not enough Blue Wall voters willing to return to recreate David Cameron's Coalition, and Red Wall voters may simply have lost too much faith in the Tories to return to the fold.

But the task of unifying the two groups again may not be impossible. The British public are above all else fair minded. Most of the public accept the hard truths of our economic difficulties and understand that difficult decisions have to be taken to resolve them. For all of the areas of disagreement between Blue and Red Wall voters, there is also much consensus - support for further windfall taxes extends across the voting public, and there is also agreement on which two areas of public spending most need to be protected - the NHS and pensions.

This means there is a potential path to at least better pleasing both sides of the 2019 Coalition. As this polling shows Blue Wall voters are largely sold on the Prime Minister's economic prowess, and he has already transformed Conservative fortunes with this group. Knowing that the Prime Minister's instincts are to restore economic confidence, these

voters might then be prepared to give the Government more leeway on specific budget measures to meet more of the priorities held by Red Wall voters. Red Wall voters in turn will be more likely to accept the need for spending restraint if it is the wealthiest who are bearing the biggest burden rather than ordinary working people.

Longer term, however, more than a patch and mend approach is needed. Red Wall voters want to see the promise of levelling up delivered. Making progress on doing so matters not just for the Tories electoral prospect, but for this group's faith in our democratic system. Across the Blue and Red Wall, voters also want to see a different approach to benefits that rewards those who have worked hardest - reforms such as introducing a contributory element to the benefits system would be a unifying policy.

There will no doubt be those who urge the Government to use culture war rhetoric as an electoral wedge that also distracts from the economic situation. Our research suggests that such an approach is unlikely to wash either with Blue or Red Wall voters - who are more concerned about their family's financial wellbeing. That doesn't mean ignoring substantive social problems - all voters urgently want the Government to get a grip on channel crossings and tackle illegal immigration – but it means taking action rather than engaging in bombastic signalling that voters will see through.

The political and economic stakes could hardly be higher for next week's budget. The task is an unenviable one. If there is good news for Rishi Sunak it is that most voters do at least appreciate how hard the balancing act is and certainly wouldn't want the job for themselves.

"I can't say that I would be able to handle it any better. Obviously there's a lot going on, but just even with what's going on in Ukraine, and it's just all very messy"

Jodie, Loyal National, Middlesbrough

"It's a bit of a tricky job and you go into a difficult job, fair play to anyone gives it a go"

Mark, Loyal National, Oldham

"I'd rather him than me running the country given the mess we're in"

Nigel, Loyal National, Heywood and Middleton

Appendix A - The British Seven segments

More in Common has worked with data scientists and social psychology researchers to build a model that maps the British population not according to their party, age, income or other demographic factor, but according to their values and core beliefs. Analysing a representative sample of more than 10,000 people in partnership with YouGov and conducting focus group conversations and one-on-one interviews with hundreds of Britons, we have identified seven distinct population groups – the 'British Seven'

Progressive Activists

A passionate and vocal group for whom politics is at the core of their identity, and who seek to correct the historic marginalisation of groups based on their race, gender, sexuality, wealth, and other forms of privilege. They are politically engaged, critical, opinionated, frustrated, cosmopolitan, and environmentally conscious.

Civic Pragmatists

A group that cares about others, at home or abroad, and who are turned off by the divisiveness of politics. They are charitable, concerned, exhausted, community-minded, open to compromise, and socially liberal.

Disengaged Battlers

A group that feels that they are just keeping their heads above water, and who blame the system for its unfairness. They are tolerant, insecure, disillusioned, disconnected, overlooked, and socially liberal.

Established Liberals

A group that has done well and means well towards others, but also sees a lot of good in the status quo. They are comfortable, privileged, cosmopolitan, trusting, confident, and pro-market.

Loyal Nationals

A group that is anxious about the threats facing Britain and facing themselves. They are proud, patriotic, tribal, protective, threatened, aggrieved, and frustrated about the gap between the haves and the have-nots.

Disengaged Traditionalists

A group that values a well-ordered society, takes pride in hard work, and wants strong leadership that keeps people in line. They are self-reliant, ordered, patriotic, tough-minded, suspicious, and disconnected

Backbone Conservatives

A group who are proud of their country, optimistic about Britain's future outside of Europe, and who keenly follow the news, mostly via traditional media sources. They are nostalgic, patriotic, stalwart, proud, secure, confident, and relatively engaged with politics.

Appendix B - Methodology

Quantitative Research

The polling cited in this report was carried out by our polling partners, Public First. Details of the methodology for the survey are available below.

Fieldwork:	1st Nov - 3rd Nov 2022
Interview Method:	Online Survey
Population represented:	GB Adults
Sample size:	2030

All results are weighted using Iterative Proportional Fitting, or 'Raking'. The results are weighted by interlocking age & gender, region and social grade to Nationally Representative Proportions

Public First is a member of the BPC and abides by its rules. For more information please contact the Public First polling team: polling@publicfirst.co.uk

Qualitative Research

More in Common has carried out extensive focus group research in areas across the Blue and Red Wall in recent weeks and months. Participants for focus groups were recruited by independent recruiters, groups were moderated and analysed by More in Common's researchers.

More in Common