



More in Common
Election Battleground Series

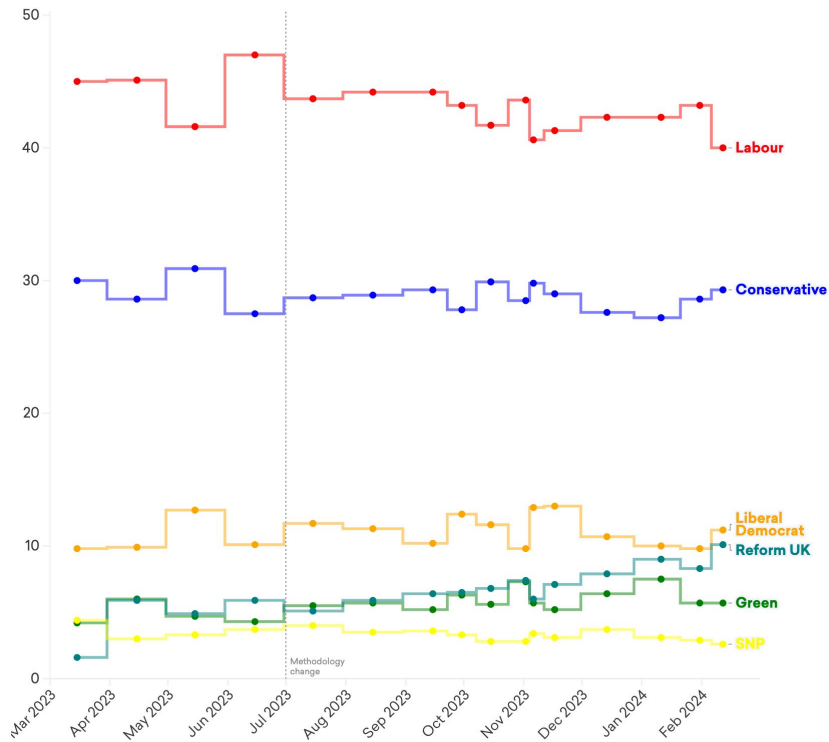
Behind the Voting Intention

February 2024

Introduction: The big picture



Westminster voting intention over time



Despite a whirlwind of political events, the headline voting intention for the two major parties has remained stable over the past year - with Labour consistently polling just over 40 per cent of the vote and the Conservatives just under 30.

With a General Election expected this year, we wanted to look beyond just these headline figures, to investigate not just what people think about our major parties, but why they think it.

This report explores the values and motivations that are driving all the key groups of voters who will shape the General Election. The aim is to create a resource that does not just describe but also explains voting patterns in the UK at this point in time, and helps to show the nuances that exist within the British public that might not be captured through headline voting intention.

Meet the voters who will determine the next election



Click on the boxes to learn more about each voter group

Loyal
Conservatives

Loyal Labour voters

Conservative to
Labour switchers

Conservative to
Don't Know voters

Reform voters

Liberal Democrat
voters

SNP voters

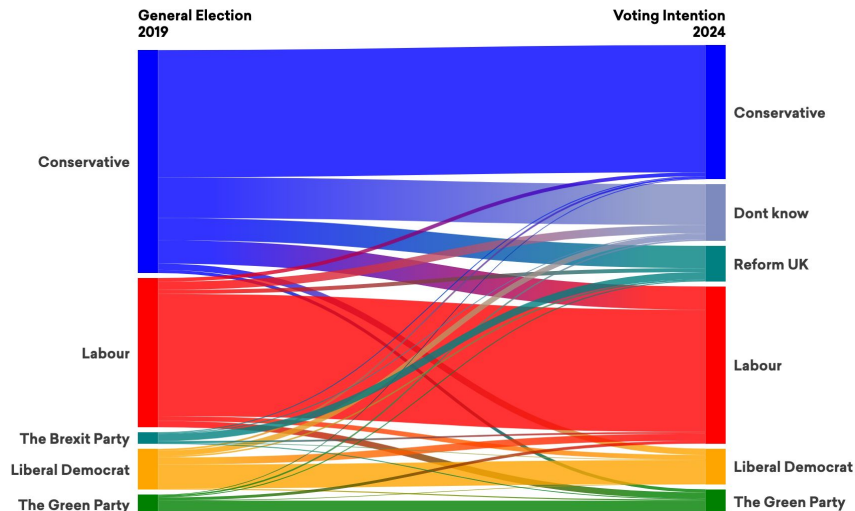
Green Party voters

Meet the voters who will determine the next election

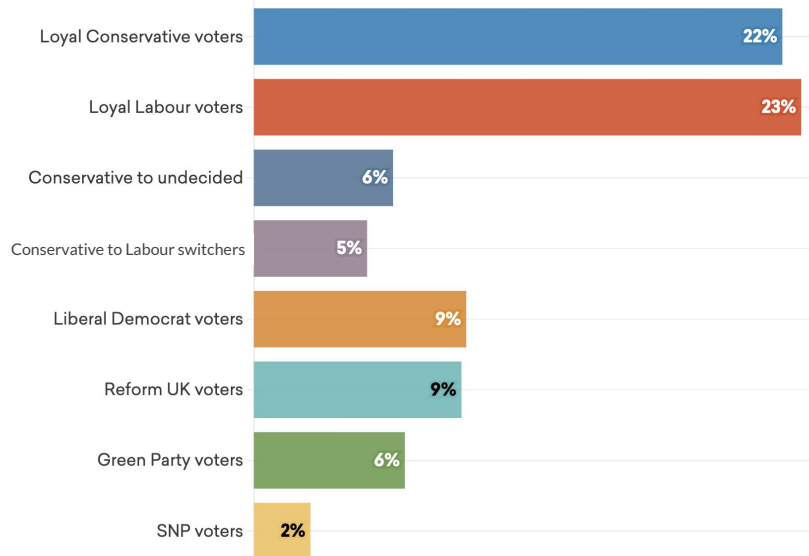


This report focuses on the eight groups who represent the most significant voter flows between 2019 and now. This is not a universal list of flows, but rather the key groups that will shape the next election.

Where have 2019 voters gone?



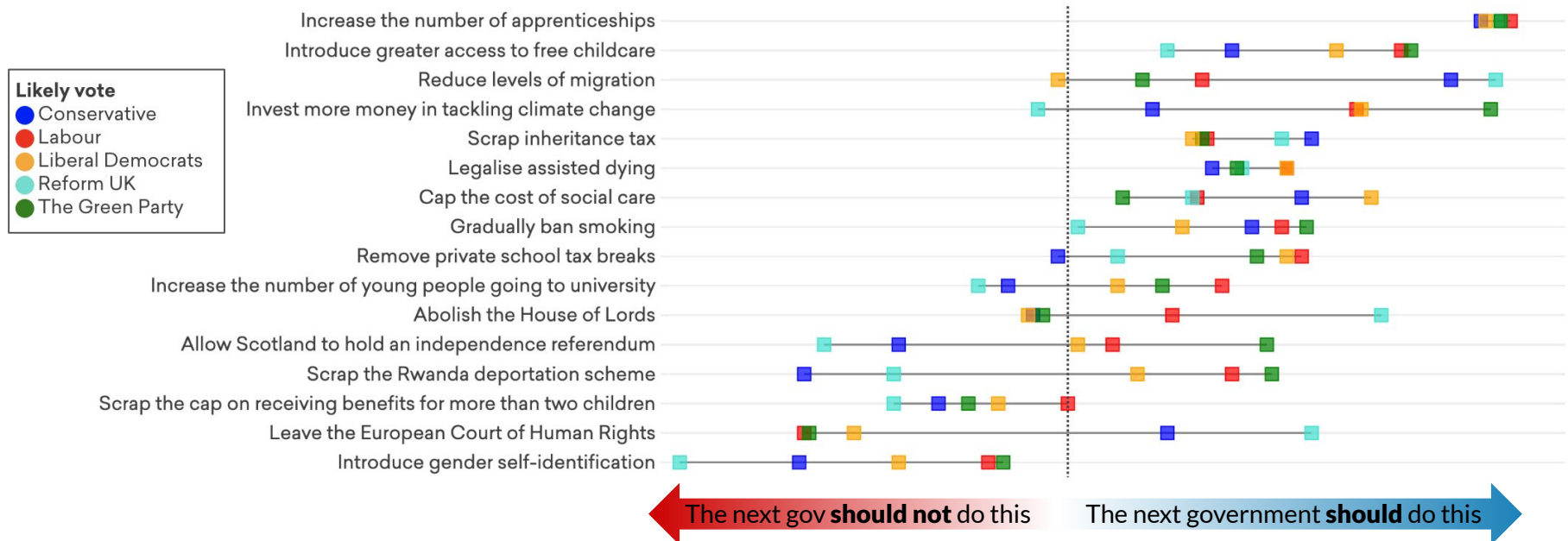
The eight groups as a percentage of all likely voters



What do these groups think?



The UK does not have “stacked identities” as in more polarised populations (e.g. in the USA). Instead, the public cluster around some popular policies (such as apprenticeships or assisted dying), and are more divided on others (such as the Rwanda policy and ECHR membership). On some policies, Reform voters are aligned with Labour voters (e.g. abolishing the House of Lords), and on others they are aligned with the Conservatives (e.g. not allowing Scotland an independence referendum).



A manifesto for 2024

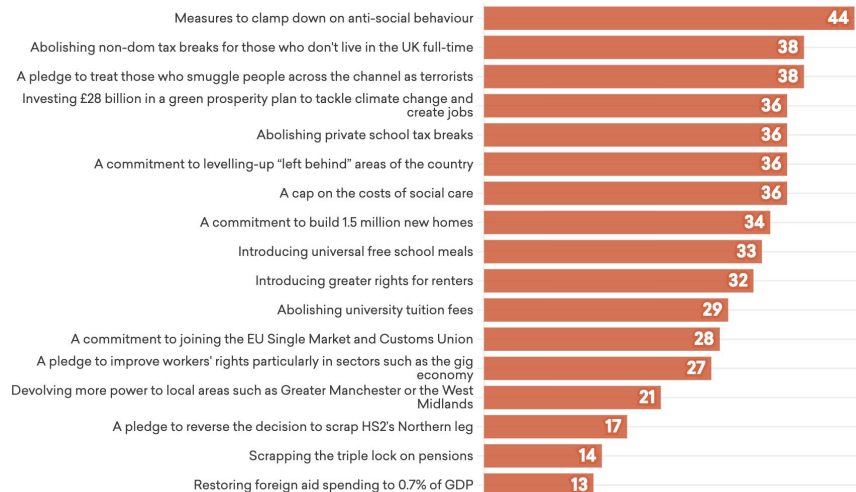


To explore the differences between the eight groups discussed in this report, we put forward a hypothetical manifesto for each of the main parties. While some of the policies are more likely to end up in manifestos than others, the aim is to identify which ideas get the most support from each of the groups. The broad public appeal of each of the policies is graphed below.

Hypothetical Labour manifesto

The following are policies which some have proposed for the Labour Party's manifesto at the next general election. Which of these would you most like to see...

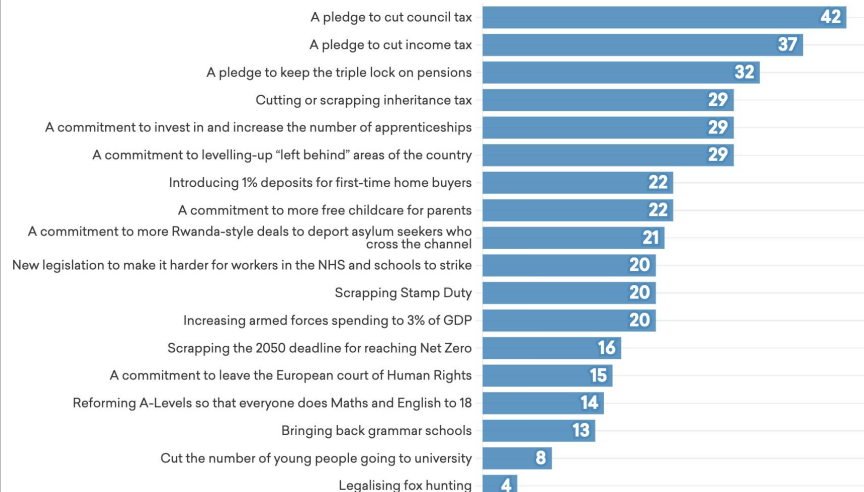
● % of UK public selecting...



Hypothetical Conservative manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...

● % of UK public selecting...



12 key findings



More Tory voters have gone to “Don’t know” than switched to Labour. Direct switching between the two main parties is important, but far from the only dynamic at this election. Unlike previous elections, the Don’t Knows are unusually Conservative in their profile.



Switchers don’t want tax cuts. Those who have switched directly from the Conservative to Labour Party are among the least likely to support tax cuts. Instead, this group have a strong preference for greater investment in public services.



Culture wars aren’t voter winners. Big issues such as the cost of living, NHS, climate and immigration are far more significant in deciding votes than issues like gender identity or political correctness. There is only minority appeal for ECHR withdrawal - among the most right-leaning voters.



Conservative 2019 voters have diverged on gender lines. Conservative 2019 voters who are now undecided are overwhelmingly female (~70%), older than average (61) and disproportionately likely to live in small towns or suburbs. Who these voters opt for will decide the scale of a Labour victory.



Cost of living remains dominant. Cost of living ranks as the number one issue facing the country - for every single voter group. Despite falling inflation it remains the most potent driver of support away from the Conservatives.



Crime is increasingly salient. For the key swing voter groups, tackling crime is among the top priorities for the next government. Less surprisingly, every group has serious concerns about the NHS with waiting list horror stories dominating focus groups.

12 key findings



Party leaders aren't wowing voters. The party leaders are not a top draw for any of the key voter groups and people are more likely to be voting against a leader of another party than for their leader. This election will be about parties, not personalities.



Reform UK voters are unlikely to return to the Conservatives. The overwhelming reason for voting Reform UK is to protest Conservative policies on immigration. They are 'anti system' - and are for instance the strongest supporters of Lords abolition. The Conservatives are unlikely to win many back.



Labour's second most popular policy with its supporters (£28bn) has now been scrapped. The climate investment pledge was popular with likely Labour voters. Other Labour policies - particularly removing private school tax breaks - also unite their potential voter coalition.



Liberal Democrats are anti-Tory voters. More so than other parties, Liberal Democrat voters are not motivated by specific policies, but instead a desire to get the Tories out. The profile of Liberal Democrat voters today is more 'Social Democrat' than Nick Clegg-style 'Orange Book Liberal'.



Nigel Farage, not Richard Tice, is attracting people to Reform. The appeal of Nigel Farage is a significant driver of support among those planning on voting for the party - other Reform figures do not have the same pull.



The SNP is bleeding votes quite dramatically to Labour in Scotland. Since 2019, the SNP have lost 36 per cent of their voters - including 15 per cent to Labour, and a further 10 per cent to "Don't know". Independence is the only glue keeping this group together.



Polling methodology:

Fieldwork dates: 26th January - 31st January 2024

Sample size: 3,113

Sample represented: GB adults (excludes Northern Ireland)

Additional polling in Scotland:

Fieldwork dates: 24th January - 6th February 2024

Sample size: 1,021

Sample represented: Scotland adults

More in Common is a member of the British Polling Council
and abides by all of their rules.

This report uses More in Common's British Seven segments as identified by our core values model.

Identified in 2020, this model uses the public's core values and worldviews - rather than demographic information - to split the UK into seven distinct groups. These are:

**Progressive Activists
Civic Pragmatists
Disengaged Battlers
Established Liberals
Loyal Nationals
Disengaged Traditionalists
Backbone Conservatives**

More information about each of the segments can be found in the [appendix](#).

Group 1

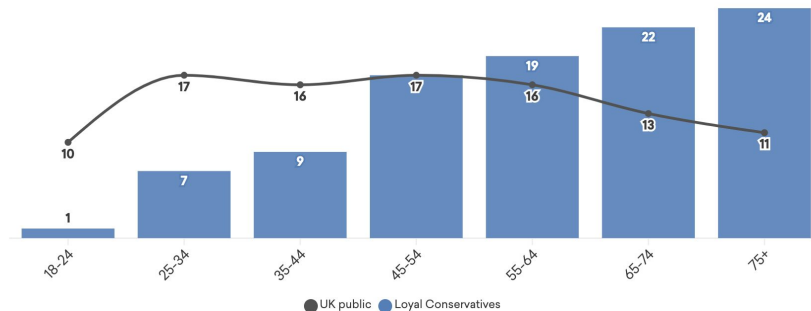
Loyal Conservative voters



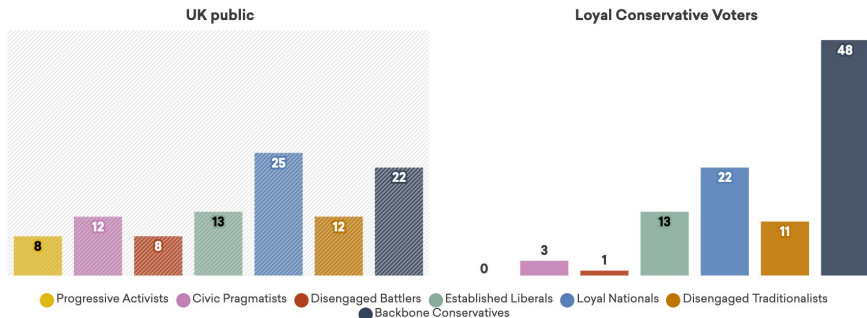
Who are the loyal Conservative voters?

Loyal Conservative voters (those who voted Conservative in 2019 and intend to do so again) skew significantly older than the UK population - they are essentially not represented at all within those aged 34 and younger. There are also overwhelmingly drawn from the Backbone Conservative segment, and only have significant membership from three other segments (Red Wall Loyal Nationals, Established Liberals, and Disengaged Traditionalists). Two-thirds of them voted Leave in the EU referendum, and they are slightly more rural than the population as a whole.

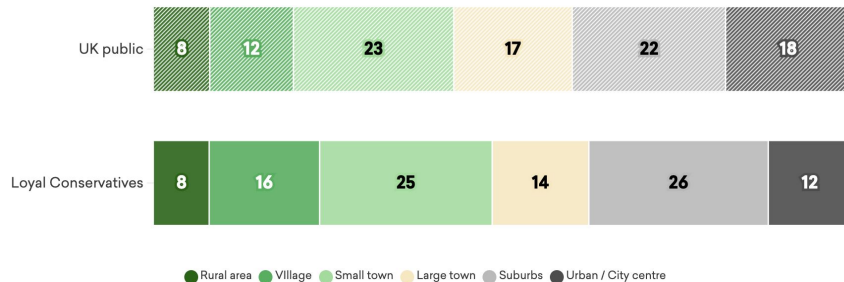
Loyal Conservative voters by age



Loyal Conservative voters by segment



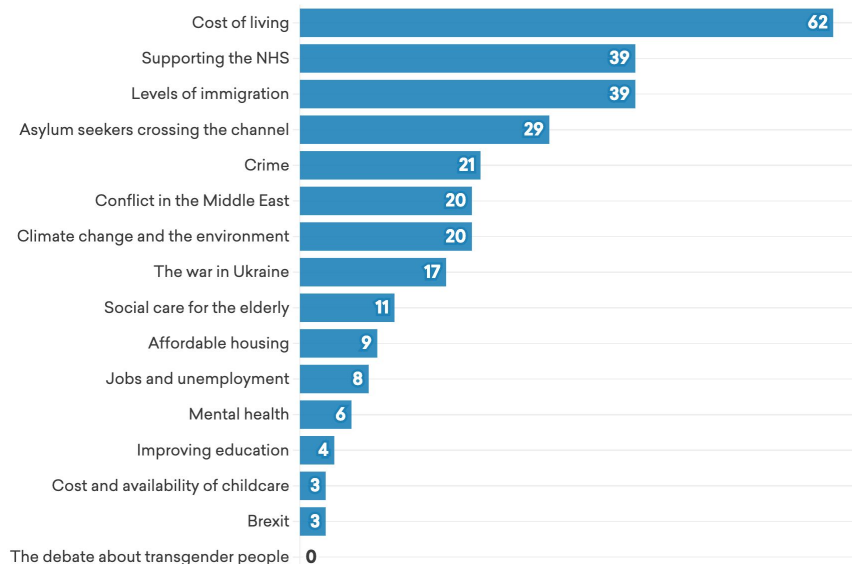
Loyal Conservative voters by rurality



What issues do loyal Conservative voters care about?

Loyal Conservatives' top two issues are the same as the wider public: the cost of living and the NHS. Beyond that, this group is significantly more concerned about immigration and asylum, and give a high priority to crime. Climate change is an issue for a fifth of this group: 23 per cent think it should be a top priority for the next Government, and 20 per cent an important one.

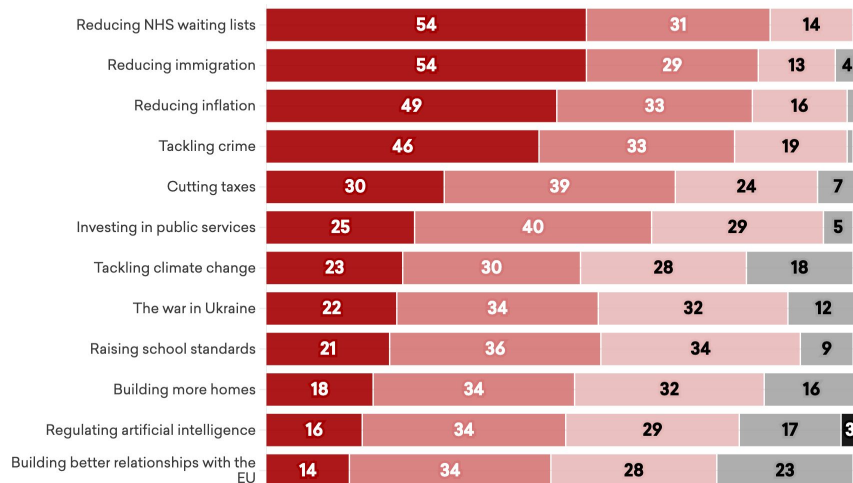
Loyal Conservatives' top issues



Loyal Conservatives' priorities for the next Government

Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:

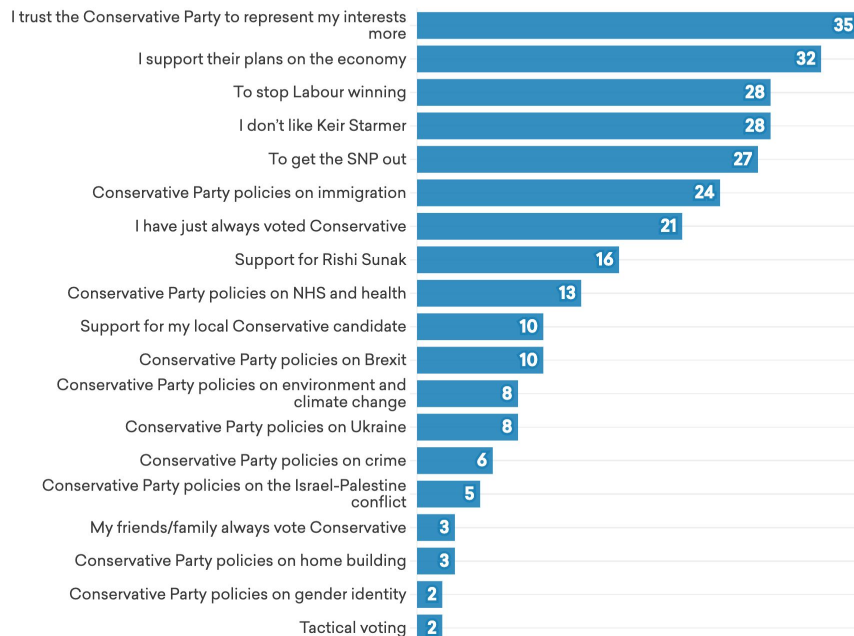
● Top priority ● Important but not top priority ● One of many priorities ● Not a priority at all ● Don't know



Why are people sticking with the Conservatives?

Loyal Conservatives' reasons for sticking with the Conservatives

You said you would vote for the Conservative Party. What are the most important factors in your decision to vote for the Conservative Party? Select up to three



No reason stands out for those sticking with the Conservatives.

On substantive policy matters, it is the economy that is encouraging Conservative voters to stay with the party. And it is clear that this group still has some fears about Labour, with “stopping Labour winning” the third most popular reason for continuing to vote Conservative.

In fact, Conservative votes seem to be motivated more by negative opposition to Labour than positive support for the Conservatives. 28 per cent of loyal Conservative voters are sticking with the party because they don't like Keir Starmer, compared to only 16 per cent who intend to vote for the party out of support for Rishi Sunak. Interestingly, a fifth of this group say that they will vote for the party again because they “have just always voted Conservative”.

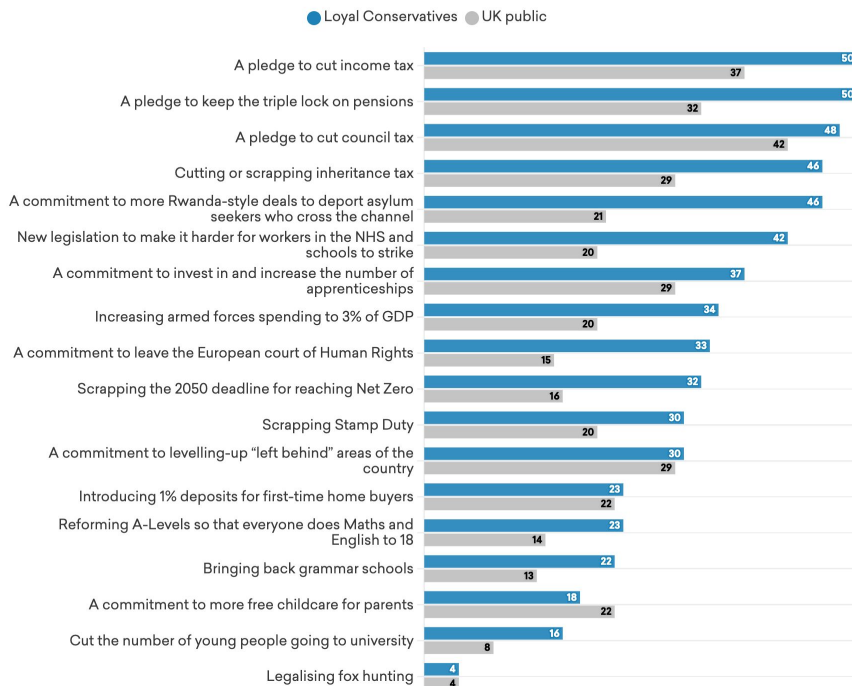
Beyond the economy, immigration is the only other stand-out policy area driving support for the Conservative party, with a quarter giving this as a reason for remaining with the party.

Conservatives rhetoric on gender identity doesn't seem to be having any significant electoral impact - only motivating 2 per cent of their voters.

Which policies do loyal Conservatives want to see in the Conservative manifesto?

Loyal Conservatives' top manifesto policies

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...



Loyal Conservative voters are more positive about our hypothetical Conservative manifesto than the public as a whole – the most popular policies for them are cuts in income, council, and inheritance tax, as well as a pledge to keep the triple lock on pensions.

It is clear that tax cuts are extremely popular with loyal Conservatives, but this group is unique in being the most supportive of income tax cuts. For the rest of the public, as well as every group in this report, council tax is the top priority for a cut.

The only policy from our list that loyal Conservatives are less likely to support than the wider public is increased spending on childcare - driven by the fact that this group are the least likely to have young children and are generally opposed to higher government spending.

Some of the gaps between loyal Conservative support and wider public opinion risk driving the Conservatives away from the median voter. For example, the Rwanda policy or scrapping net-zero both land well with those most likely to vote Tory, but are much less popular with the voters that the Conservatives desperately need to win back.

Group 2

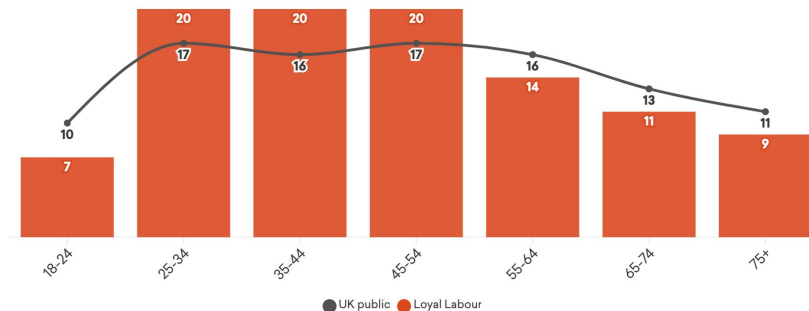
Loyal Labour voters



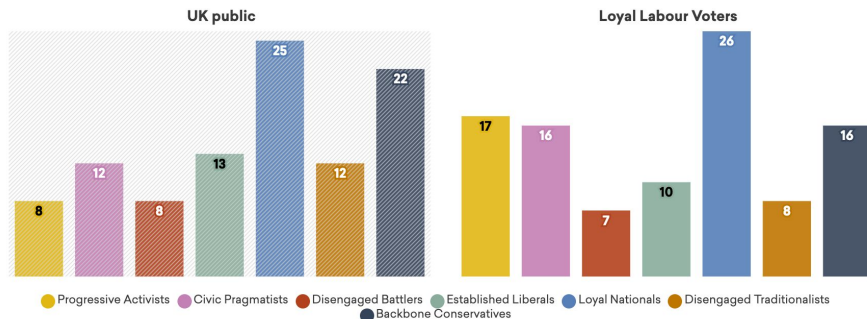
Who are the loyal Labour voters?

Loyal Labour voters (those who voted Labour under Jeremy Corbyn in 2019 and intend to do so again) skew younger than the UK population, but are well-represented in all age groups. Similarly, they are more urban than the population as a whole, but can be found in rural areas, villages and towns in large numbers as well. By segment, a quarter of loyal Labour voters are Loyal Nationals - the economically statist but socially conservative segment that is most associated with the “Red Wall”. Loyal Labour voters are over-represented among Progressive Activists, although some in this segment have switched to the Green Party since 2019.

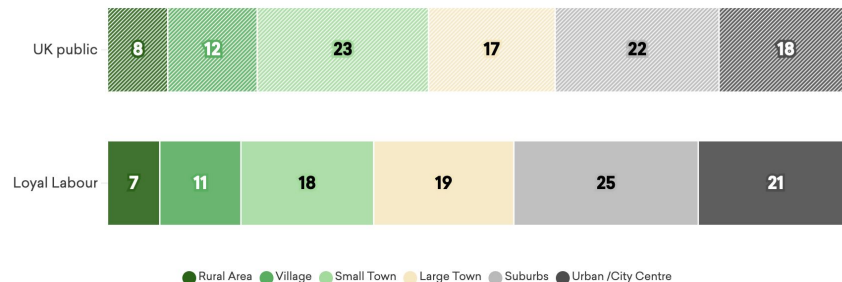
Loyal Labour voters by age



Loyal Labour voters by segment



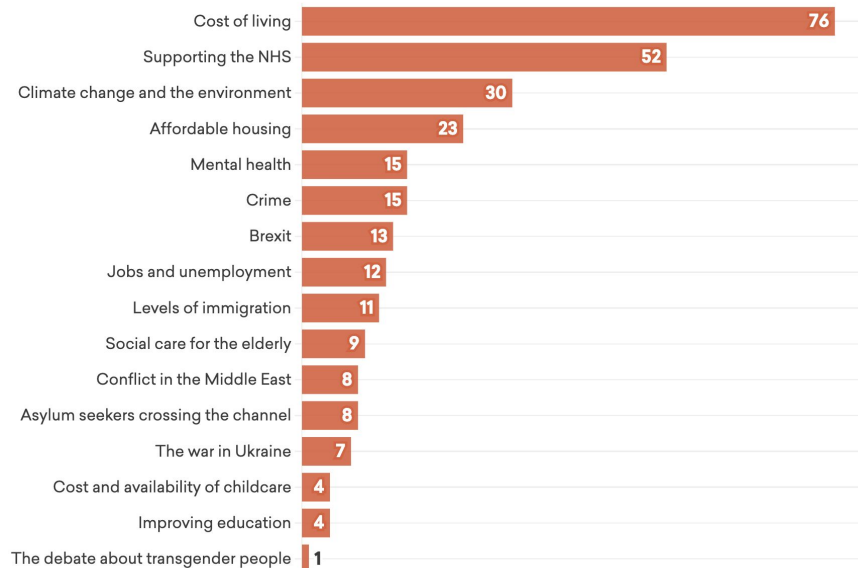
Loyal Labour voters by rurality



What issues do loyal Labour voters care about?

Loyal Labour voters are aligned with the UK public in placing cost of living, supporting the NHS, and climate change as their top three issues. They are more likely to list affordable housing and mental health as top issues than the wider public, and less likely to prioritise immigration and small boats. They are also more likely to prioritise public investment than cutting taxes.

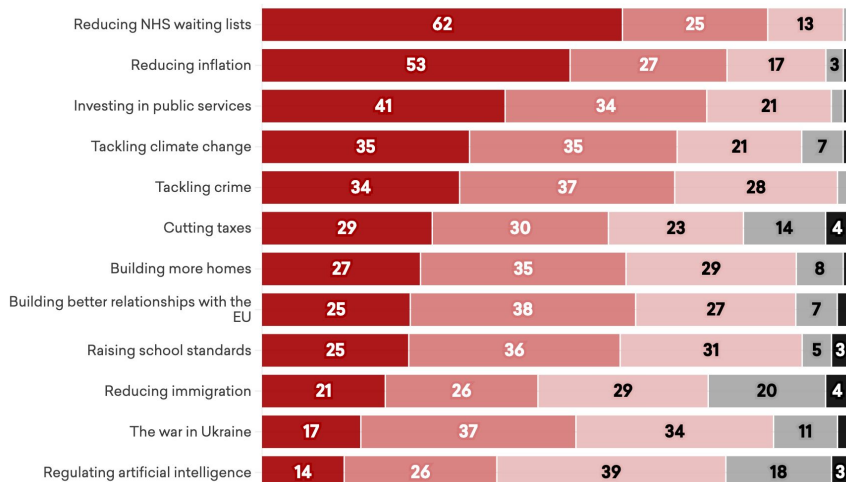
Loyal Labour voters' top issues



Loyal Labour voters' priorities for the next Government

Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:

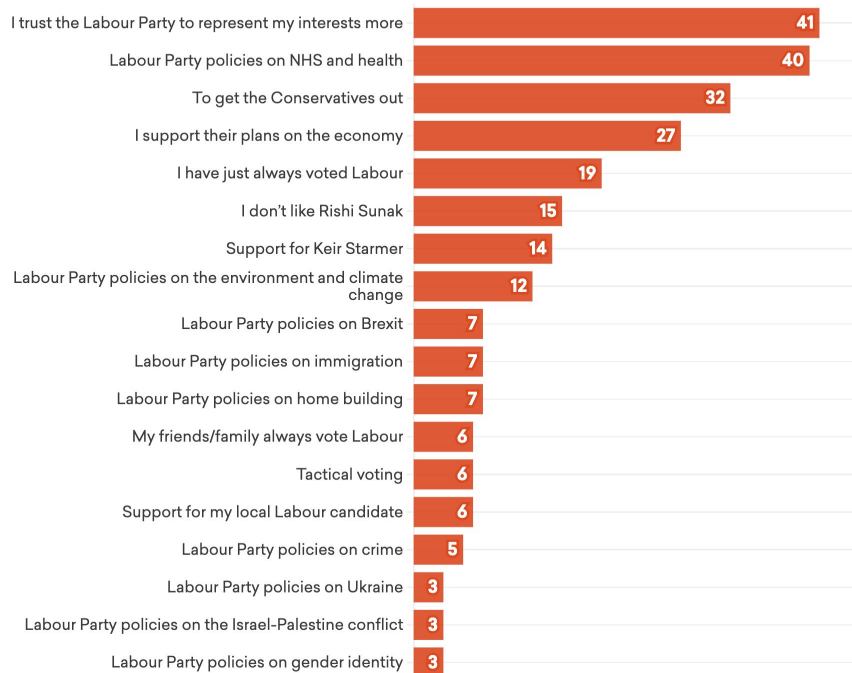
● Top priority ● Important but not top priority ● One of many priorities ● Not a priority at all ● Don't know



Why are people sticking with Labour?

Loyal Labour voters' reasons for sticking with Labour

You said you would vote for the Labour Party. What are the most important factors in your decision to vote for the Labour Party? Select up to three



Whereas the Conservatives are retaining their 2019 voters with their policies on the economy, Labour voters are sticking with the party overwhelmingly because of their healthcare policies.

A third of loyal Labour voters are voting to get the Conservatives out, and more are voting for Labour out of dislike for Rishi Sunak than support for Keir Starmer.

As with loyal Conservative supporters, around a fifth of this group intend to stick with the Labour party simply because they always have done.

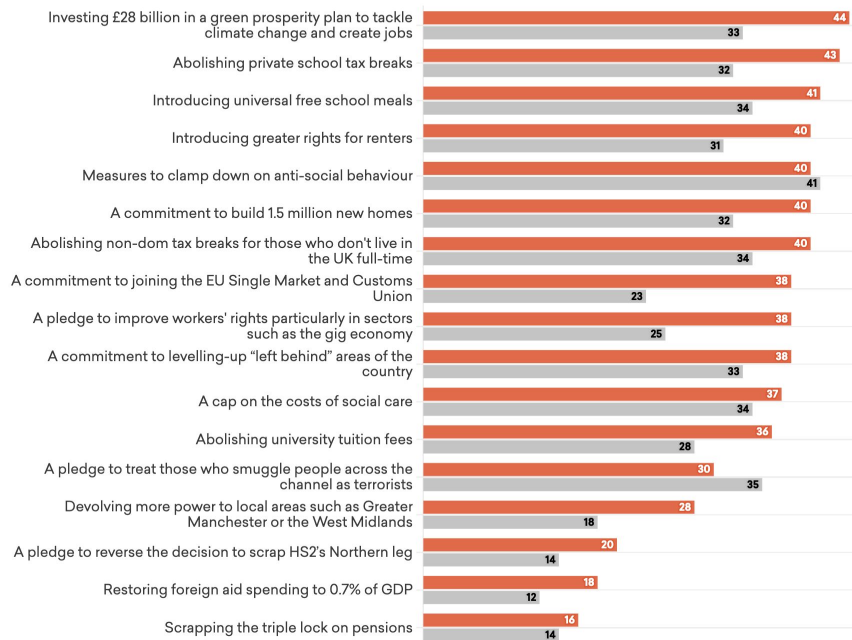
Other policy areas are not substantive motivations for sticking with Labour - including climate change, Brexit, immigration, or home building.

Which policies do loyal Labour voters want to see in the Labour manifesto?

Loyal Labour voters' top manifesto policies

The following are policies which some have proposed for the Labour Party's manifesto at the next general election. Which of these would you most like to see...

● Loyal Labour ● UK public



Loyal Labour voters support the hypothetical Labour manifesto slightly more enthusiastically than wider UK public opinion. Their most popular policies are the £28 billion climate pledge and abolishing private school tax breaks.

Some policies that land well with loyal Labour voters are unlikely to garner the same support from the wider public - in particular a commitment to rejoin the EU Single Market and Customs Union.

Loyal Labour voters are less supportive than the wider public of measures to clamp down on antisocial behaviour and tough measures on people smugglers, but there is not much to indicate that Labour's tougher rhetoric and support for these policies is deterring loyal Labour voters either.

What hesitations do loyal Labour voters have?

Loyal Labour voters' hesitations voting Labour

What are your hesitations, if any, about voting Labour? Select up to three.



Almost half of loyal Labour voters say they will definitely vote Labour, but many of them still have hesitations.

Topping the list of hesitations are fears that Labour won't do a better job on the cost of living or NHS - the two issues that loyal Labour voters care most about.

Specific issues concern small groups of Labour voters - fears that Labour will raise taxes too much, won't tackle illegal immigration, or won't be bold enough on climate change. For 8 per cent it is that they don't know what Starmer stands for that concerns them.

Some of the most commonly discussed Labour vulnerabilities are not significant concerns for loyal Labour voters. Only 4 per cent are worried they are not pro-Palestine enough (and only 2 per cent they are not pro-Israel enough). Only 3 per cent cite antisemitism as a potential hesitation, and only 3 per cent Starmer's views on gender identity. Labour should take this as a reminder that the noisiest debates are not the most important, even to their core voters - who above all else want to be reassured on bread-and-butter issues like the cost of living and NHS.

Group 3

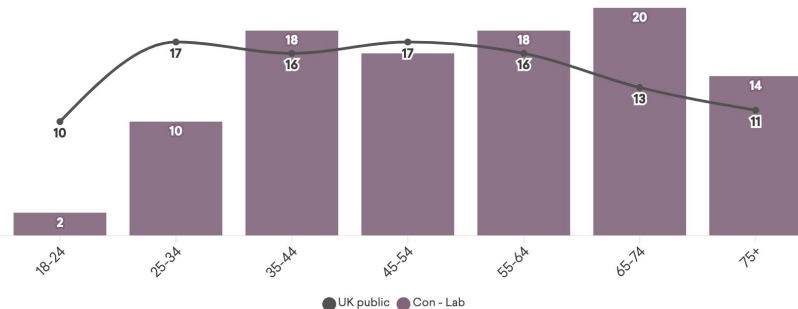
Conservative to Labour switchers



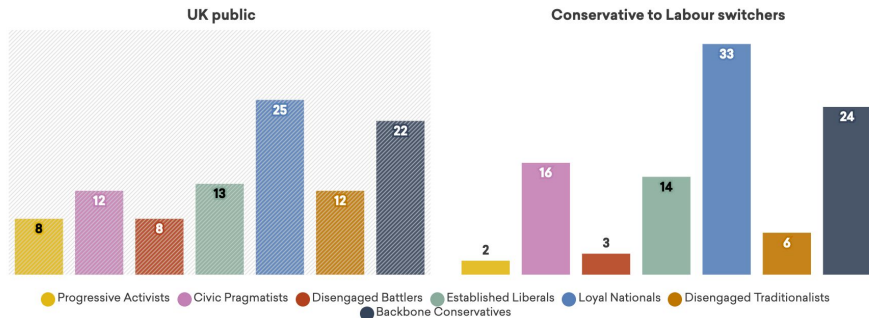
Who are the Conservative to Labour switchers?

Conservative to Labour switchers (those who voted for Boris Johnson and the Conservatives in 2019 but now intend to vote Labour) skew slightly older than the UK population. A third of them are from our Loyal National segment - the economically statist but socially conservative group who embody the typical “Red Wall” voters, meaning that Labour gains directly from the Conservative will go a long way in terms of voter efficiency (i.e. they are more concentrated in marginal seats) at the next election. 61 per cent of this group voted for Brexit and point to Labour’s disproportionate success in winning back Leave voters they lost in 2019.

Conservative to Labour switchers by age



Conservative to Labour switchers by segment



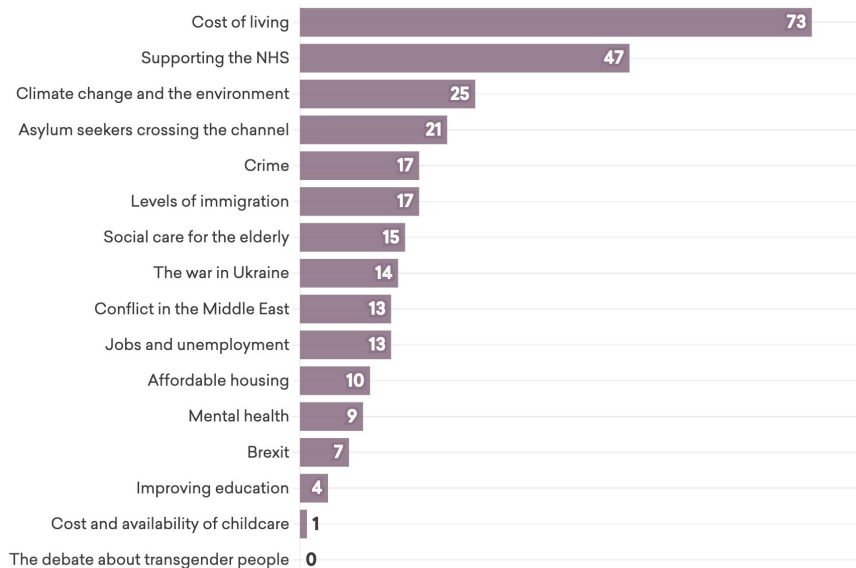
Conservative to Labour switchers by rurality



What issues do Conservative to Labour switchers care about?

Conservative to Labour switchers are in line with public opinion on the issues they care most about: cost of living, the NHS, climate change, and immigration. Interestingly, they place crime as a top priority for the next government - potentially driven by their higher than average threat perception. Cutting taxes is their lowest priority, whereas investment in public services ranks much higher.

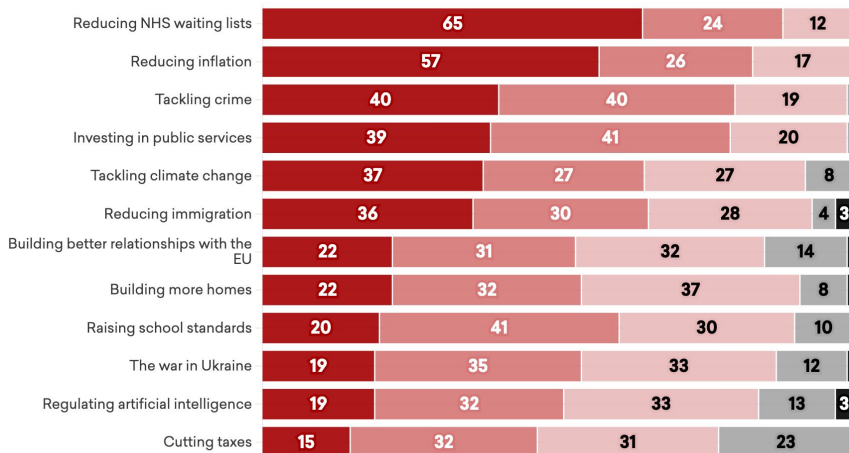
Conservative to Labour switchers' top issues



Conservative to Labour switchers' priorities for the next Government

Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:

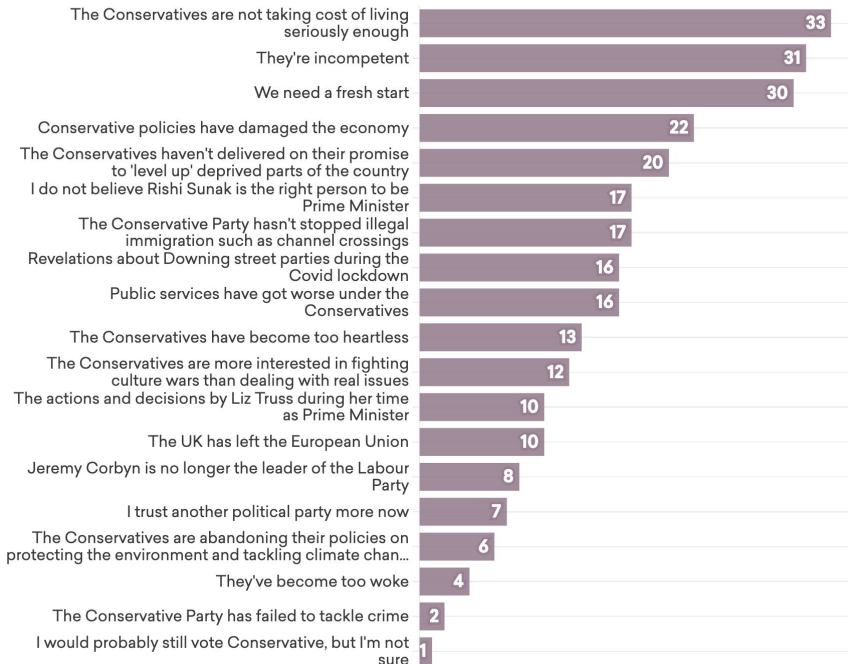
● Top priority ● Important but not top priority ● One of many priorities ● Not a priority at all ● Don't know



Why are people switching from the Conservatives?

Conservative to Labour switchers' reasons for switching

You said you voted for the Conservative party in 2019, but now no longer intend to. Which of the following are the main reasons for this? Select up to three



It appears that economic management is the most potent reason that voters have abandoned the Conservative party in such large numbers, with a range of other issues, including management of public services, featuring less strongly.

Top of the list is the sense that the Conservatives aren't taking the cost of living seriously enough. A sense that the Conservatives haven't lived up to their promises on the economy is also evident in other responses, such as the idea that Conservatives have damaged the economy (22% of respondents) or that they haven't been able to level up deprived areas (20%).

Other reasons are less tangible. The second and third most selected reasons for abandoning the Conservative party are that the Conservatives are incompetent and that we need a fresh start - and our polling shows that the public do not see Sunak as the change candidate he has been branding himself as.

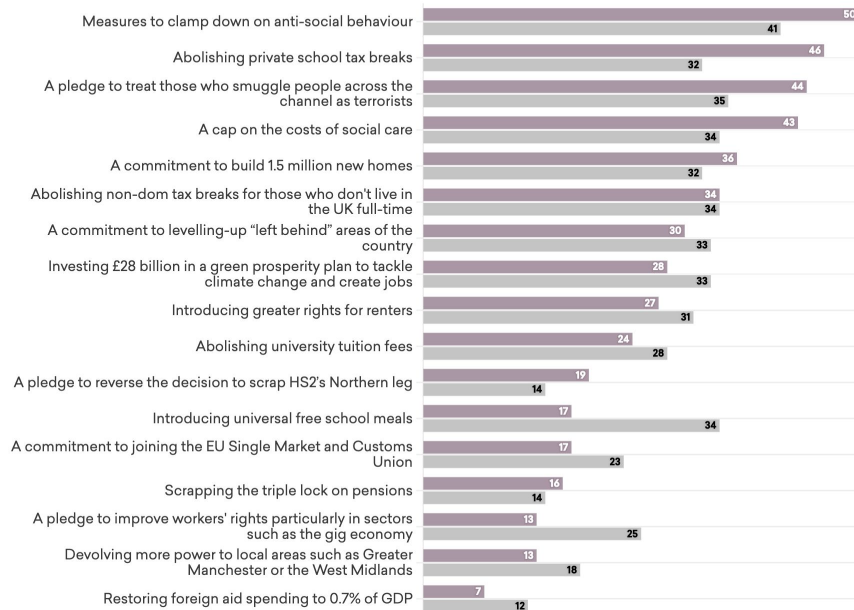
This group of switchers are also the most likely to say that Partygate influenced their decision to abandon the Conservatives.

Which policies do Conservative to Labour switchers want to see in the Labour manifesto?

Conservative to Labour switchers' top policies for a Labour manifesto

The following are policies which some have proposed for the Labour Party's manifesto at the next general election. Which of these would you most like to see...

● Con - Lab switchers ● UK public



Policies from Labour's hypothetical manifesto are popular with Conservative to Labour switchers. Top of the list is measures to clamp down on anti-social behaviour, which is popular both with this swing group as well as the wider public.

This group also favour Labour's more populist policies on people smugglers and private schools.

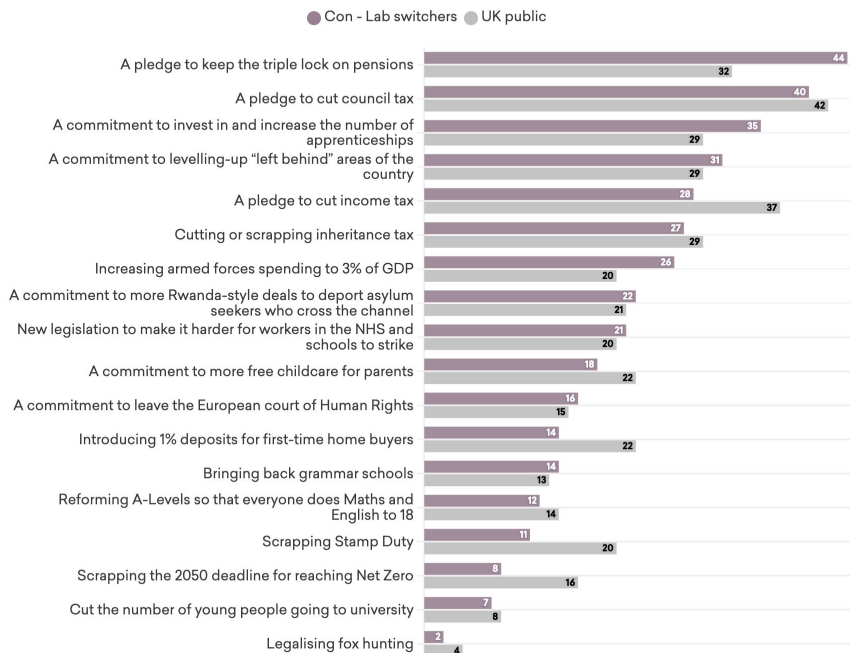
Support for other policies reveals this groups is more socially conservative and more Eurosceptic than Labour's other voters.

They are, for example, less supportive of closer EU alignment, foreign aid spending, and free school meals than the wider public.

Which policies do Conservative to Labour switchers want to see in the Conservative manifesto?

Conservative to Labour switchers' top policies for a Conservative manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...



Many of the popular hypothetical Conservative policies also resonate with Conservative to Labour switchers. In particular, a pledge to keep the triple lock on pensions, and a pledge to cut council tax top this voter group's list of policies.

Conservative measures on social mobility resonate strongly with this voter group - in particular investment in both apprenticeships and levelling up.

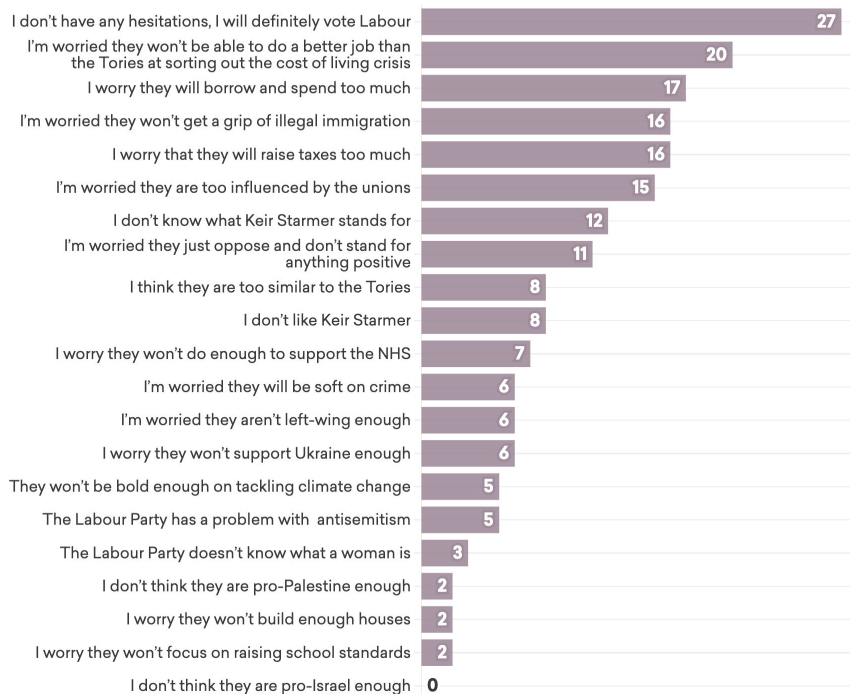
Cutting income tax, inheritance tax, and stamp duty are less popular with this group of voters than with the wider public - matched by the fact that tax cuts are not a priority for this group who much favour public investment.

Similarly, Conservative reversals on net-zero are particularly unpopular to this group, 37 per cent of whom say that tackling climate change should be a top priority for the next government.

What hesitations do Conservative to Labour switchers have?

Conservative to Labour switchers' hesitations voting Labour

What are your hesitations, if any, about voting Labour? Select up to three.



Compared to loyal Labour voters, these switchers are much less certain about their vote - only 27 per cent of them say that they have no hesitations and will definitely vote Labour.

For a fifth of these voters, concerns that Labour won't do a better job on the cost of living crisis is a hesitation they have over their vote - unsurprising given that cost of living is the top concern for the country more generally.

On other issues, this swing group's Conservative leanings are visible. Their other hesitations, shared by more than 15 per cent of this group, are all traditional Labour weak-points - concern about borrow-and-spend, high taxes, or immigration.

Conversely, high profile debates about gender or Israel-Palestine seem to be having limited impact on how this group are thinking about voting.

Group 4

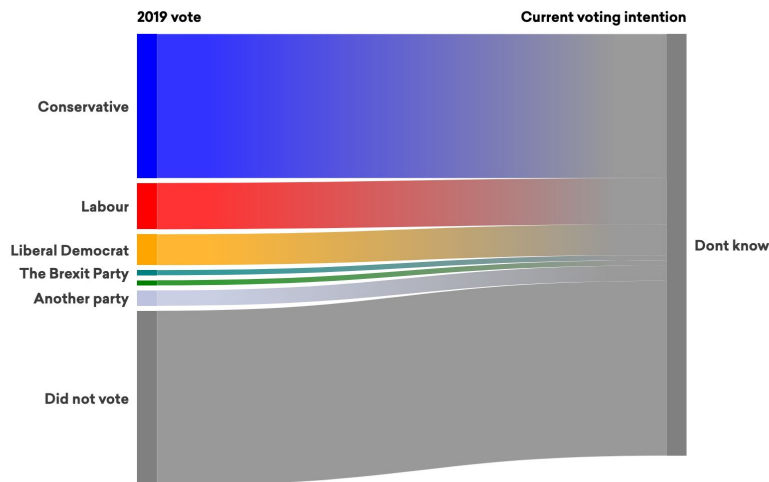
Conservative to undecided



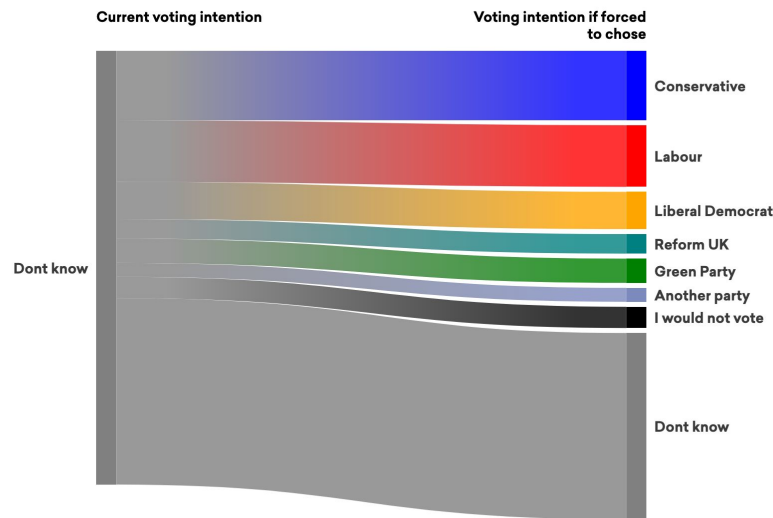
What do we know about undecided voters?

There is nothing unusual about having a large number of undecided voters this far from an election, but 2024 is unique in how partisan undecided voters are. A quarter of undecided voters voted Tory in 2019, and they are more likely to vote Conservative if forced to choose than the wider public. A great deal of uncertainty surrounds whether these voters will stay at home or come out to vote.

How did undecided voters vote in 2019?



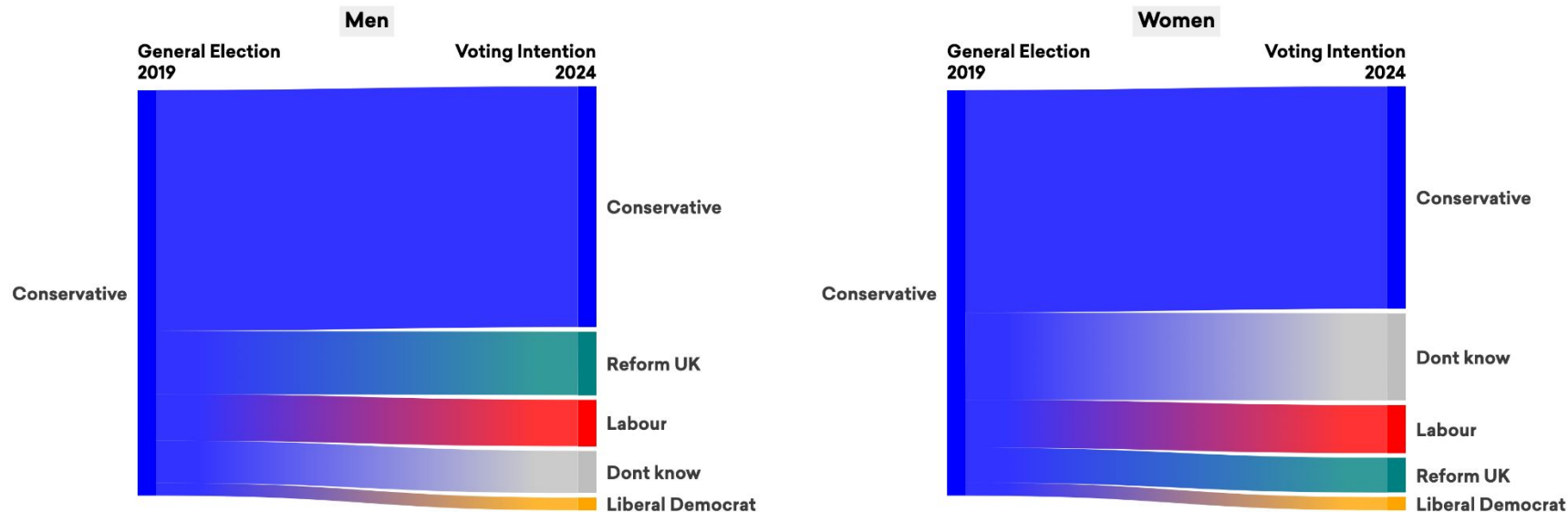
Who would undecided voters vote for if forced to chose?



Conservative to undecided voters are overwhelmingly female

Conservative to undecided voters are the most female of the groups discussed in this report - 72 per cent of them are female. In fact, Conservative voters have diverged by gender since 2019 - men have switched to Reform UK and Labour in the biggest numbers, whereas women are more likely to have switched to don't know.

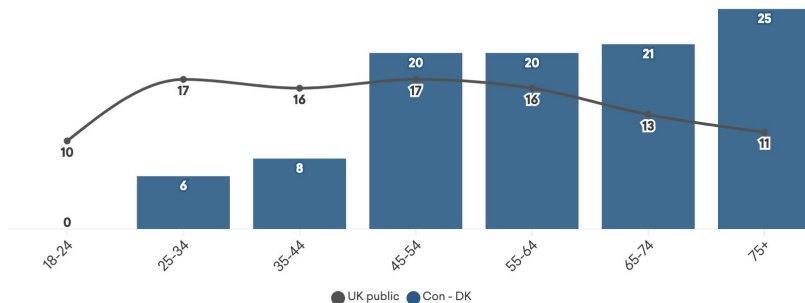
Where have 2019 Tory voters gone - by gender?



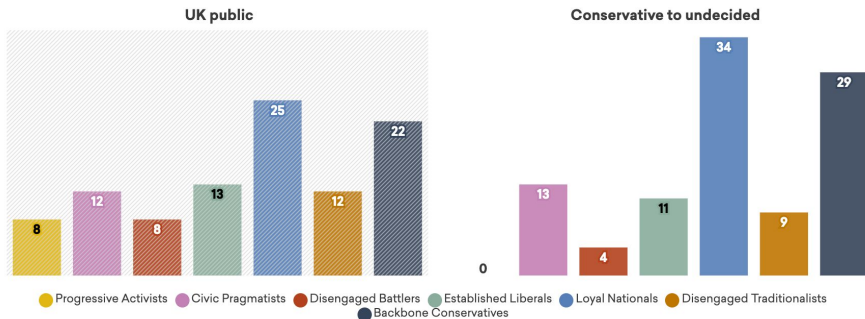
Who are the Conservative to undecideds?

Conservative to undecided voters skew much older than the rest of the population - there are vanishingly few people under the age of 45 in this category. They are also much more small-c conservative than the rest of the country - coming largely from our Backbone Conservative and Loyal National segments - which supports the idea a large number are in fact disgruntled Conservatives. Alongside loyal Conservatives, they are the most likely to own their home outright.

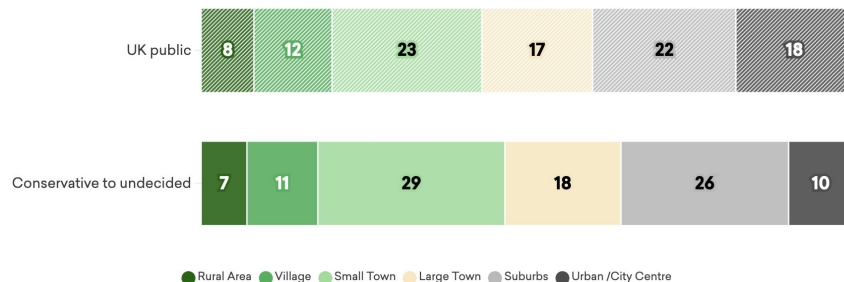
Conservative to undecided voters by age



Conservative to undecided voters by segment



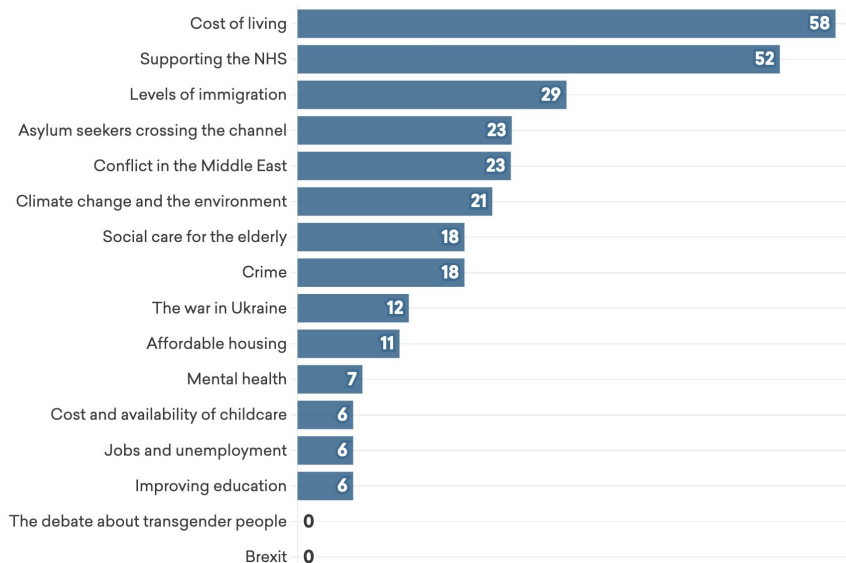
Conservative to undecided voters by rurality



What issues do Conservative to undecided voters care about?

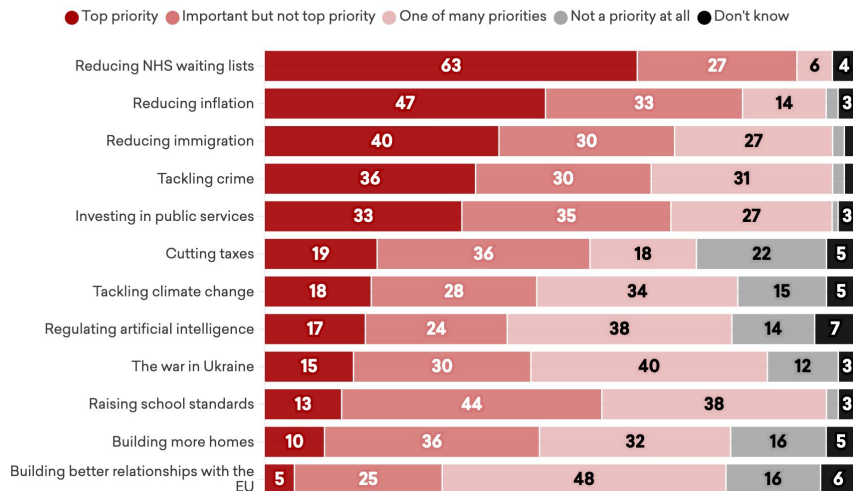
As with the rest of the country, Conservative to undecided voters care first and foremost about the cost of living and the NHS - although the proportion of them selecting cost of living as a top issue is significantly lower than the national average of 71 per cent. They care more than the national average about immigration, small boats, social care for the elderly, and conflict in the middle East.

Conservative to undecided voters' top issues



Conservative to undecided voters' priorities for the next Government

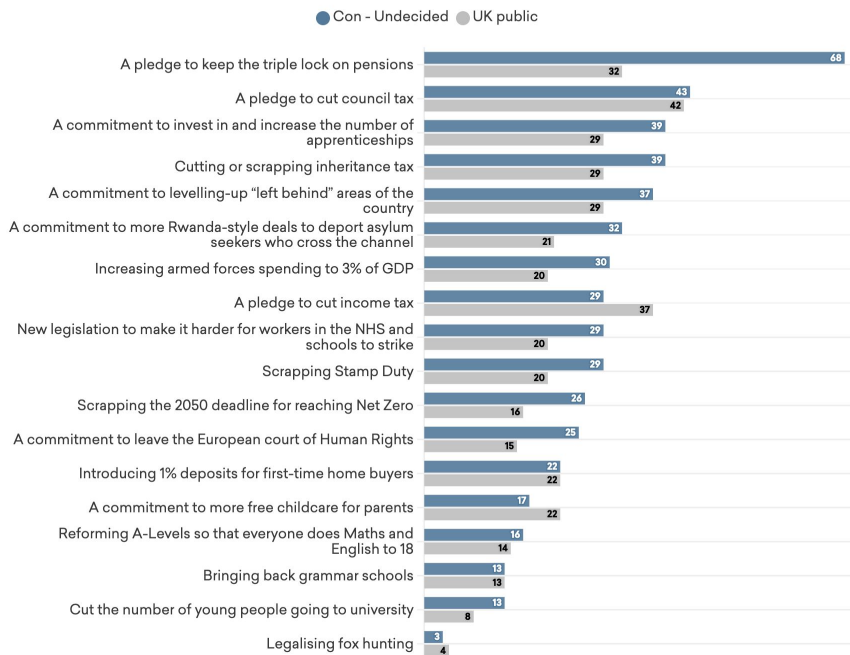
Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:



Which policies do Conservative to undecided switchers want to see in the Conservative manifesto?

Conservative to undecided voters' top policies for a Conservative manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...



A number of Conservative policies are likely to appeal to the undecided voters the party needs to win back. Most striking of all is a pledge to keep the pensions triple lock, which is extremely popular among this group of voters and significantly outperforms all other policies we tested.

Council tax and inheritance tax cuts also perform relatively well with this group, although income tax cuts do not. This matches their sense that investing in public services should be a bigger priority for the next government than cutting taxes.

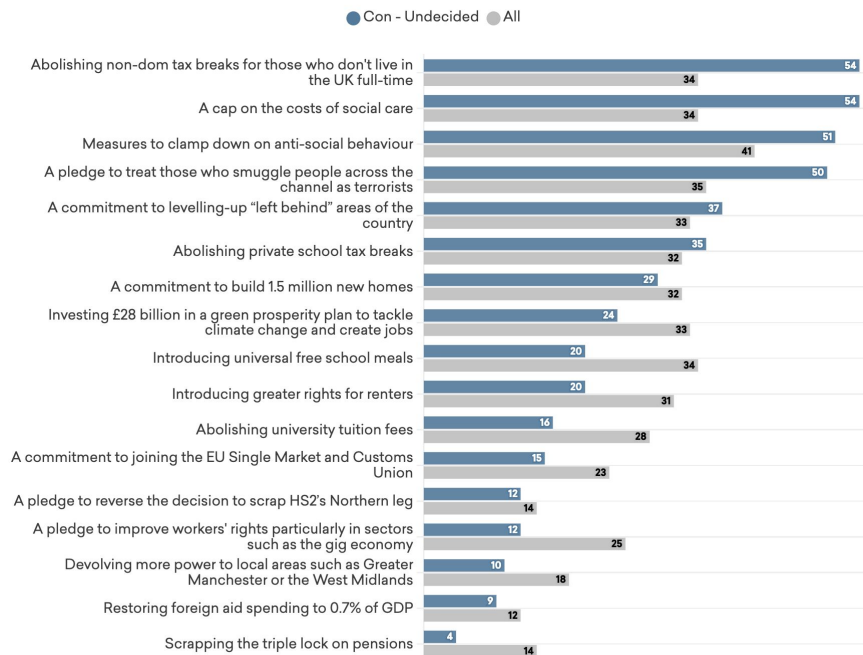
Like other groups, measures on levelling up and apprenticeships score highly with undecided former Tory voters, as do policies which are less popular with other groups, such as immigration or armed-forces spending.

Scrapping net zero or leaving the ECHR perform better with this group of voters than with the UK public as a whole, but are still toward the bottom of the list of policies that Conservative to undecided voters would like to see from a Conservative manifesto.

Which policies do Conservative to undecided switchers want to see in the Labour manifesto?

Conservative to undecided voters' top policies for a Labour manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...



A number of potential Labour policies are popular with Conservative to undecided switchers - even more so than with the wider UK public. These included abolishing non-dom tax breaks, capping the costs of social care, and measures to clamp down on anti-social behaviour.

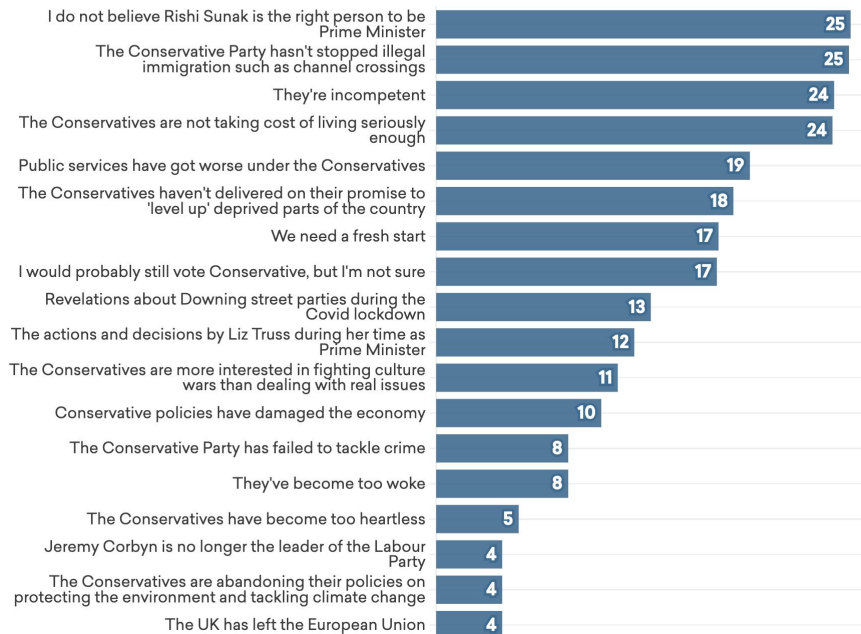
On the other hand, some potential Labour policies that are popular with the wider public do not attract the same support from Conservative to undecided voters. Most notable are introducing free school meals and greater rights for renters - highlighting this group's greater hesitancy towards redistributive measures.

Compared to Conservative to Labour switchers, this manifesto exercise suggests there is greater scope for the Conservatives to win back their undecided voters, than they are to switch directly to Labour. However there remains a significant risk that these voters sit on their hands, which risks magnifying the scale of any defeat.

Why are Conservative to undecided voters no longer intending to vote Conservative?

Conservative to undecided voters' reasons for no longer voting Conservative

You said you voted for the Conservative party in 2019, but now no longer intend to. Which of the following are the main reasons for this? Select up to three.



There is no stand-out reason for why so many undecided voters have left the Conservative party. Competency is clearly playing a role. This group are also particularly likely to single out Rishi Sunak as their hesitancy towards voting Conservative, and from focus groups we know that at least some of this group preferred Boris Johnson to his successor.

In terms of policy, a quarter are no longer sure about voting Conservative because they have failed to stop illegal immigration, and a similar amount have switched because of the Conservative record on the cost of living.

Just over 10 per cent cite Partygate or the actions of the Truss administration as a reason why they are now undecided, lower than those who have switched directly to Labour.

Just under a fifth of these voters (17 per cent) say that they will still probably vote Conservative, but they are not sure.

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Group 5

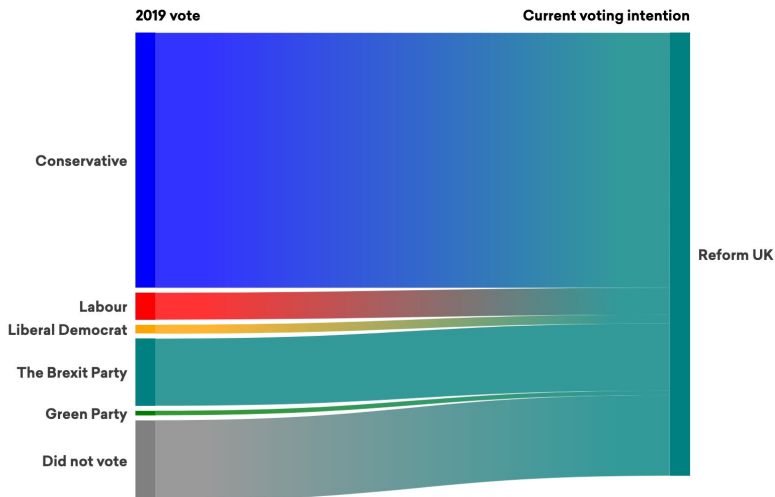
Reform UK voters



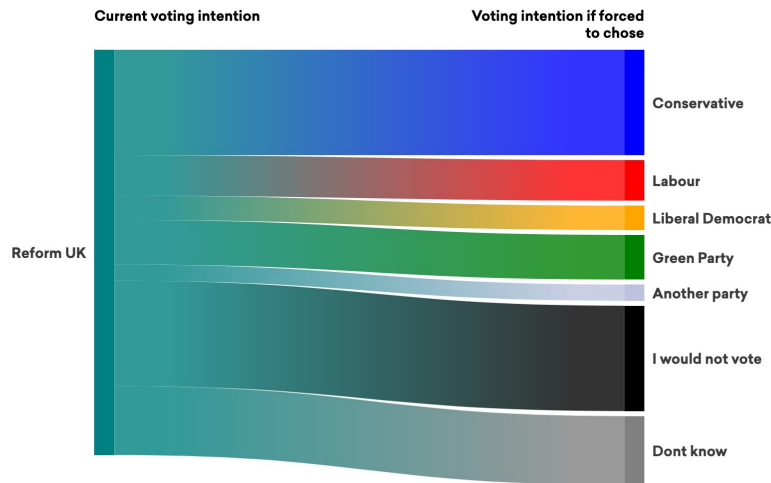
What do we know about Reform UK voters?

Reform UK's decent poll performance has overwhelmingly come from disillusioned 2019 Conservative voters. But Reform standing down at a General Election would only benefit the Conservatives by a small amount: If Reform wasn't an option, only a quarter would go back to the Conservatives. The majority of Reform UK voters are now protest voters who are unlikely to vote for either of the large parties.

How did Reform UK voters vote in 2019?



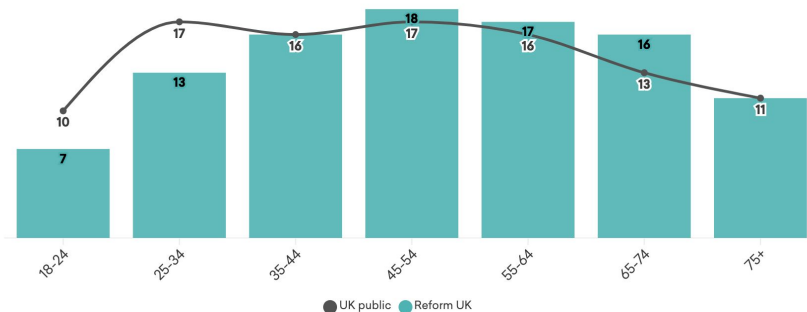
Who would Reform UK voters vote for if Reform stood down?



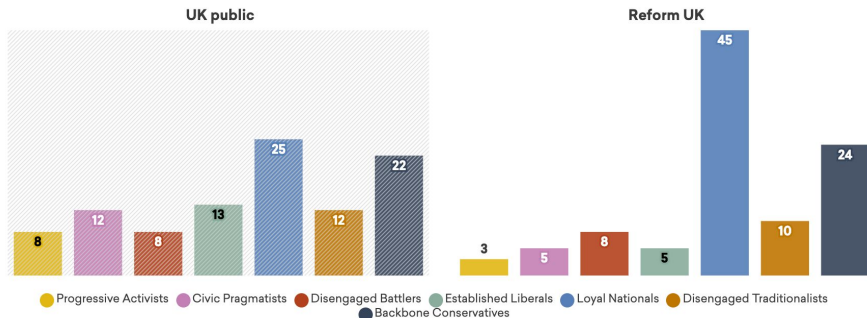
Who are Reform UK voters?

Reform UK voters overwhelmingly sit in our Loyal National segment - the economically left-leaning but socially Conservative group whose support for Boris Johnson secured the Conservatives their large majority in 2019. On Reform's current voting intention they are unlikely to win any seats, but by drawing almost exclusively on the Conservative's 2019 Red Wall voters, a solid Reform performance is likely to dig into narrow Tory majorities in seats that were won in 2019 - likely benefiting Labour.

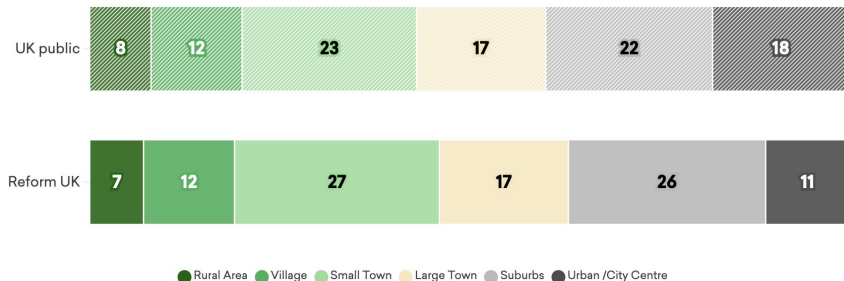
Reform UK voters by age



Reform UK voters by segment



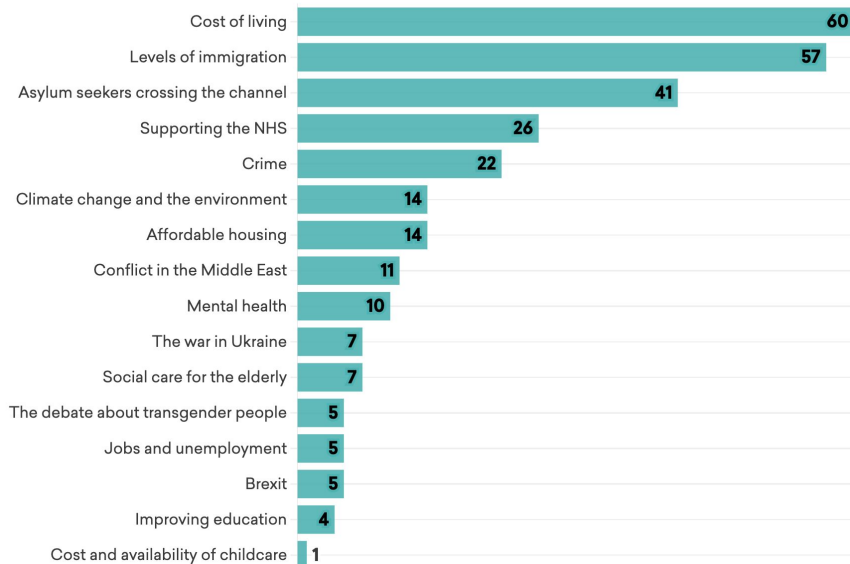
Reform UK voters by rurality



What issues do Reform UK voters care about?

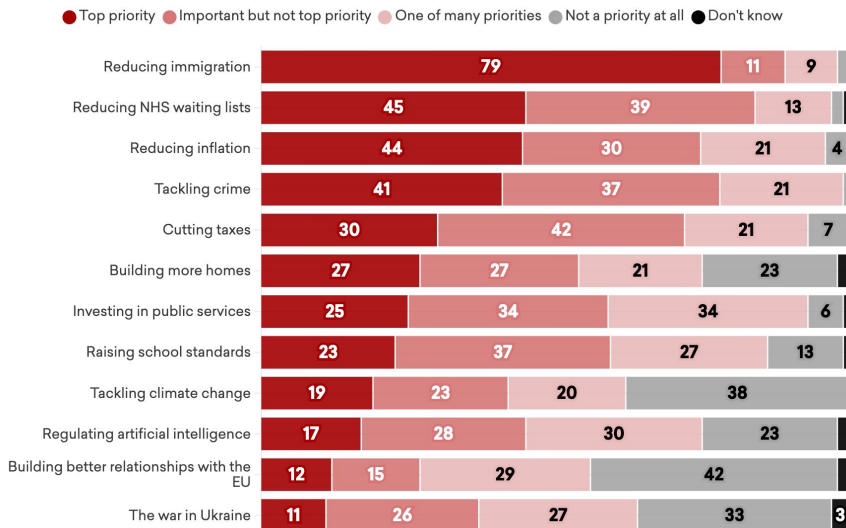
Like all other voter groups, Reform UK voters care about the cost of living above all else. But they are unique in prioritising immigration and asylum so highly, as their second and third most important issues. Crime is also more important for Reform UK voters than the median Briton - driven in part by this group's higher than average threat perception.

Reform UK voters' top issues



Reform UK voters' priorities for the next Government

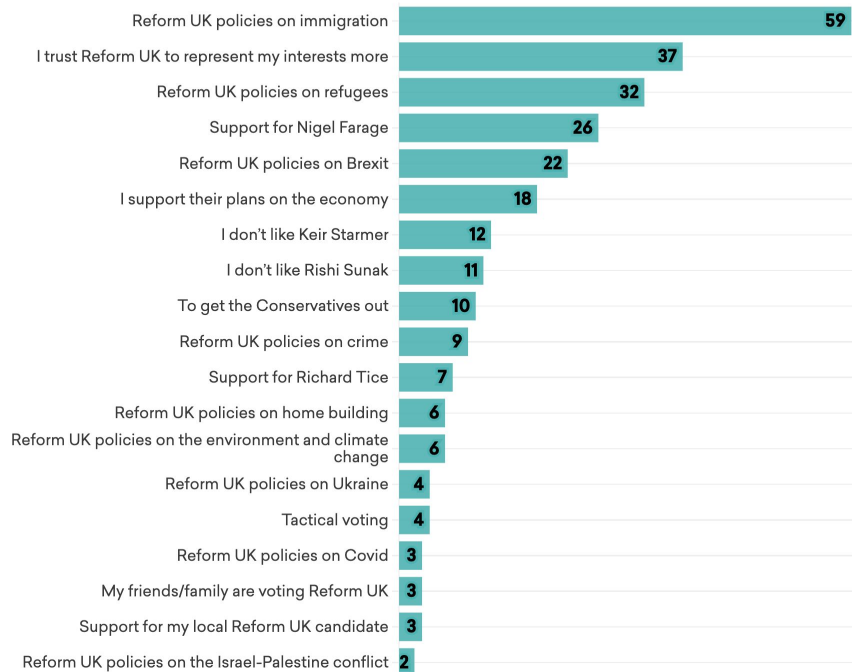
Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:



Why are people voting Reform UK?

Reasons for voting Reform UK

You said you would vote for Reform UK. What are the most important factors in your decision to vote for the Reform UK? Select up to three



Unlike some of the other groups discussed in this report, a single issue is driving support for Reform: immigration. For six-in-ten Reform UK voters, their policies on immigration are a top reason for voting for that party, and significant chunk also intend to vote Reform for their policies on refugees.

A quarter of Reform UK voters are voting that way out of support for Nigel Farage - while 7 per cent are doing so to support Richard Tice. Our polling in July found that only 13 per cent of the public could identify Tice as leader of Reform (the same number think that Farage is the leader). And our focus group research finds that Tice's name recognition is low even among Reform UK voters, whereas for these voters Farage's 'relatability' appeals.

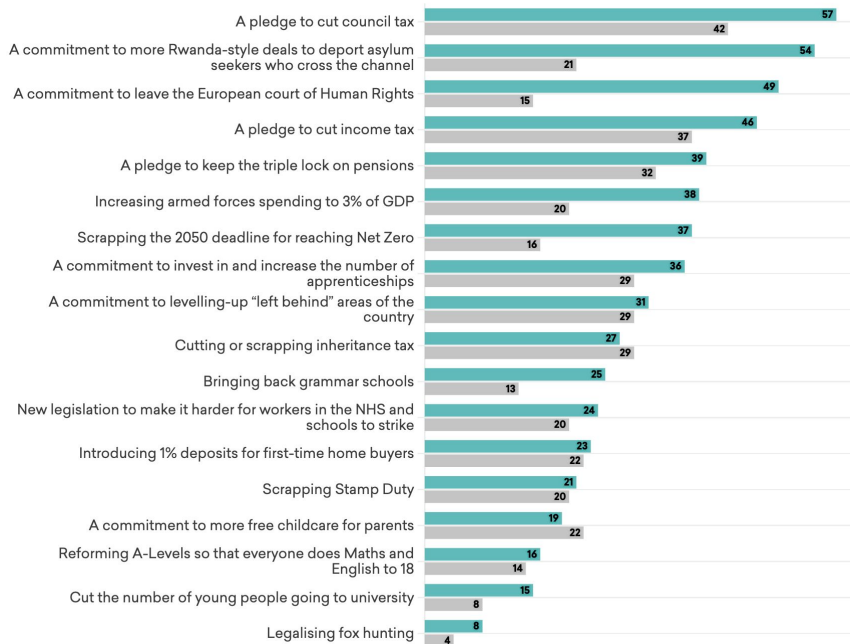
Reform's policies on Covid and climate change, which the party has made a central plank of their policy platform, are not attracting many voters to the party – and are firmly at the bottom of this list of reasons for voting Reform. In fact, a fifth of Reform voters think that tackling climate change should be a top priority for the next government.

Which policies do Reform voters want to see in the Conservative manifesto?

Reform UK voters' top policies for a Conservative manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...

● Reform UK ● UK public



Reform voters differ significantly from the UK public in support for policies from our hypothetical Conservative manifesto - suggesting that a Conservative party proposing some of these policies might help them win back some Reform voters, but at the cost of wider public support.

At the top of Reform voters' list is a pledge to cut council tax, which also tops the wider public's list of policies from this hypothetical manifesto.

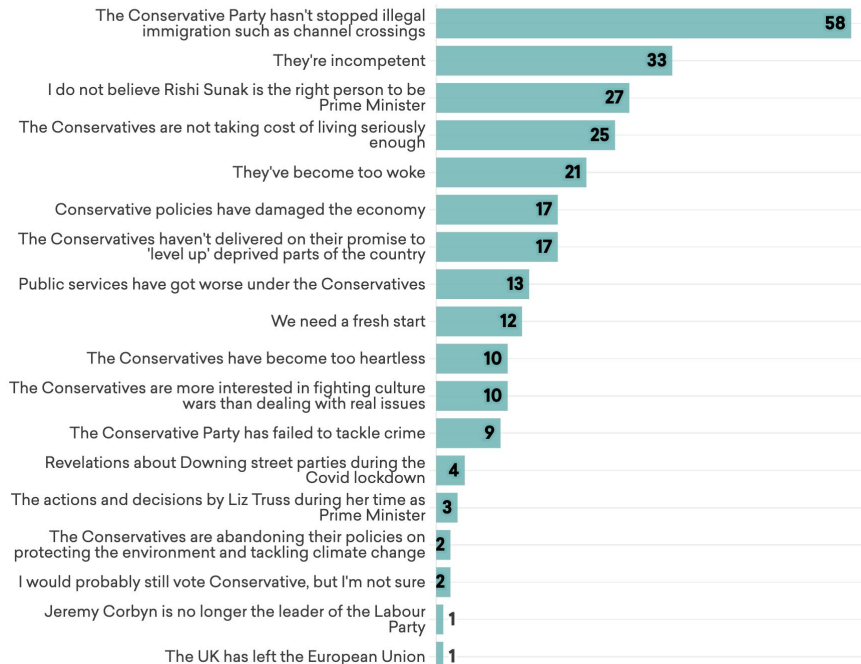
But following this are stern measures on immigration: the Rwanda asylum scheme and leaving the ECHR. While these proposals are popular with Reform voters, they are towards the bottom of the list of priorities for the wider public, and among other swing groups these policies are actively opposed - putting the Conservatives in a tight position of having to decide which group to pursue.

Policies which land well with Reform voters and the wider public include tax cuts, investment in apprenticeships, and investment in levelling up.

Why are Conservative to Reform switchers no longer intending to vote Conservative?

Reform UK voters' reasons for no longer voting Conservative

You said you voted for the Conservative party in 2019, but now no longer intend to. Which of the following are the main reasons for this? Select up to three.



One reason stands out for why so many Conservative 2019 voters have switched to Reform UK: the Conservative record on channel crossings. No other group of Conservative switchers have a similar singular reason for their leaving the party.

Beyond immigration, perceived incompetence and disapproval of Rishi Sunak are drivers of people away from the Conservative party and towards Reform UK.

Reform switchers are unique in selecting “they’ve become too woke” in significant numbers - with a fifth of Conservative to Reform UK switchers selecting this as a reason, compared to only 10 per cent of all Conservative switchers nationally. This group also are more likely than average to cite Rishi Sunak’s leadership as a reason for not voting Conservative.

Their decision to switch to Reform UK has been much less influenced by Partygate or Liz Truss’s mini budget than other swing groups.

Group 6

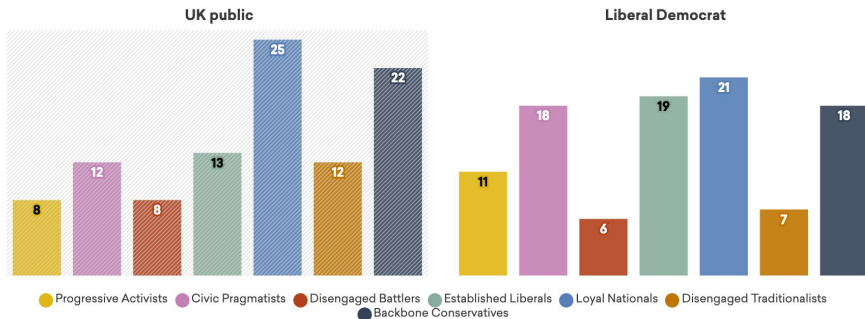
Liberal Democrat voters



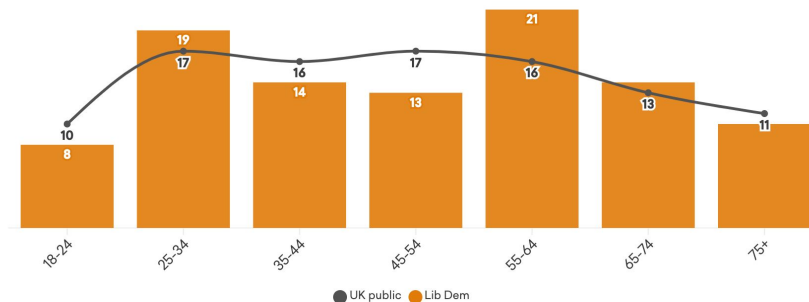
Who are Liberal Democrat voters?

Liberal Democrat voters can be found in all age groups and live across both urban and rural areas. They are disproportionately drawn from our Civic Pragmatist and Established Liberal segments. These two groups have trended away from the Conservatives since the Brexit referendum, and those that are shifting towards the Liberal Democrats rather than Labour are likely to be doing so out of their more liberal economic views or a sense that they are “lending” their otherwise Conservative vote to the Liberal Democrats instead.

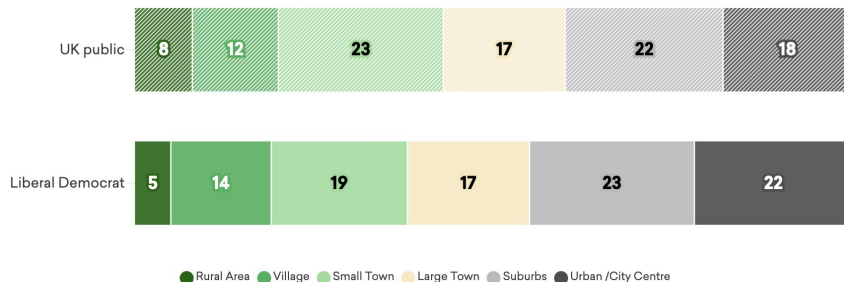
Liberal Democrat voters by segment



Liberal Democrat voters by age



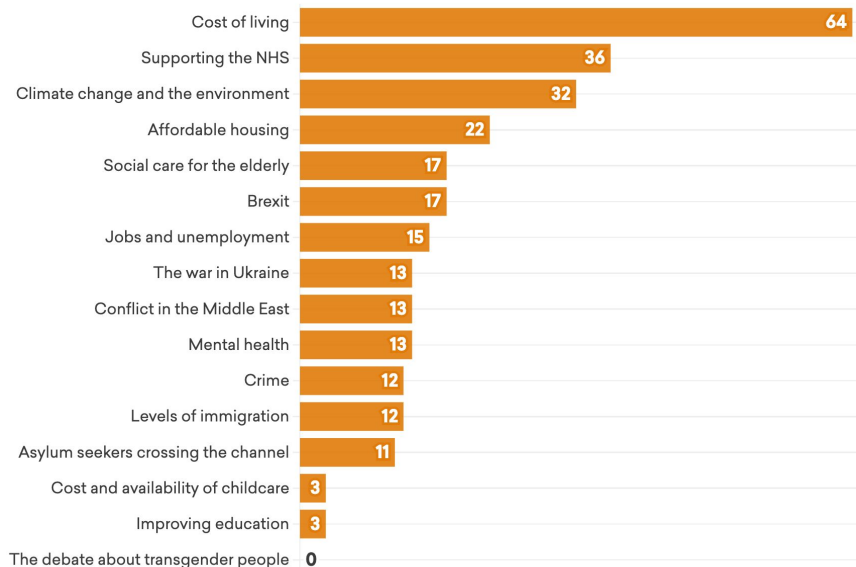
Liberal Democrat voters by rurality



What issues do Liberal Democrat voters care about?

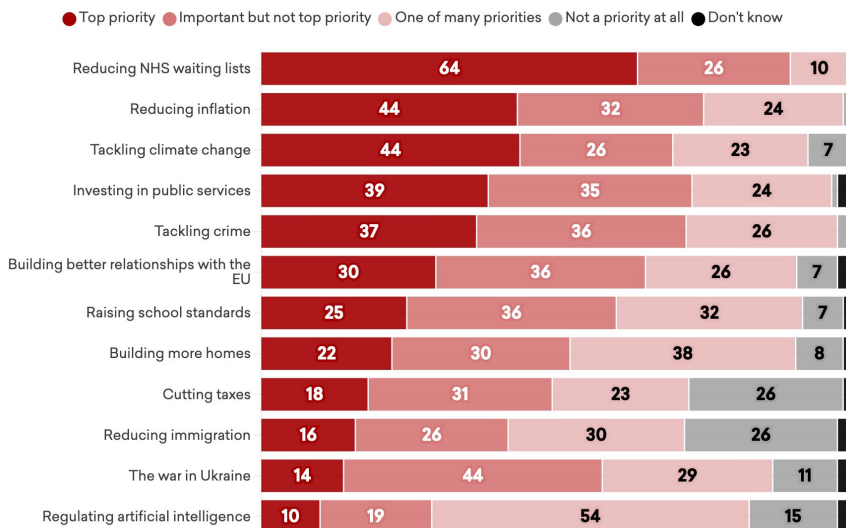
Liberal Democrats' top issues closely align with the wider public, although they are unique in having very low concern for levels of immigration and small boats. Instead, Liberal Democrat voters care slightly more about climate change than the UK public as a whole, and also care about Brexit and social care for the elderly much more. Their low threat perception makes crime a low priority.

Liberal Democrat voters' top issues



Liberal Democrat voters' priorities for the next Government

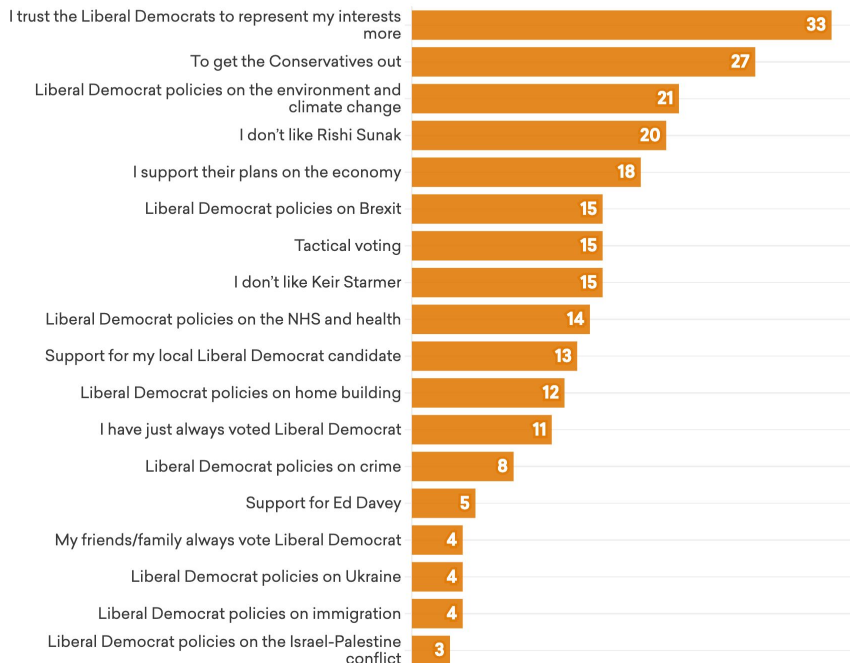
Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:



Why are people voting for the Liberal Democrats?

Reasons for voting Liberal Democrats

You said you would vote for the Liberal Democrats. What are the most important factors in your decision to vote for the Liberal Democrats? Select up to three



Liberal Democrat voters are much more likely to be voting tactically, and much less “sticky” than other voter groups in the UK. Almost three in ten Liberal Democrat voters are motivated to get the Conservatives out, and a fifth are voting Liberal Democrat because they dislike Rishi Sunak.

Compared to other voting groups, Liberal Democrat voters’ voting intention is explained less by specific policy issues. The policies that do drive voters to the Liberal Democrats are policies on climate change and Brexit - increasingly areas that separate the Liberal Democrats from Labour and the Conservative party.

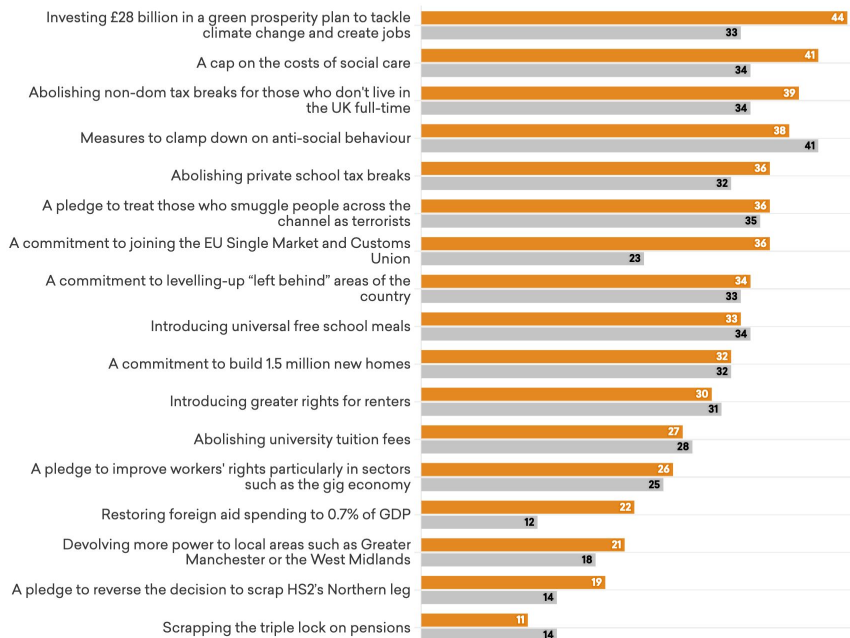
Only five per cent of Liberal Democrat voters are voting Liberal Democrat out of support for Ed Davey - whereas many more are voting Liberal Democrat out of dislike for Keir Starmer and Rishi Sunak.

Which policies would Liberal Democrat voters want to see in the Labour manifesto?

Liberal Democrat voters' top policies for a Labour manifesto

The following are policies which some have proposed for the Labour Party's manifesto at the next general election. Which of these would you most like to see...

● Lib Dem ● UK public



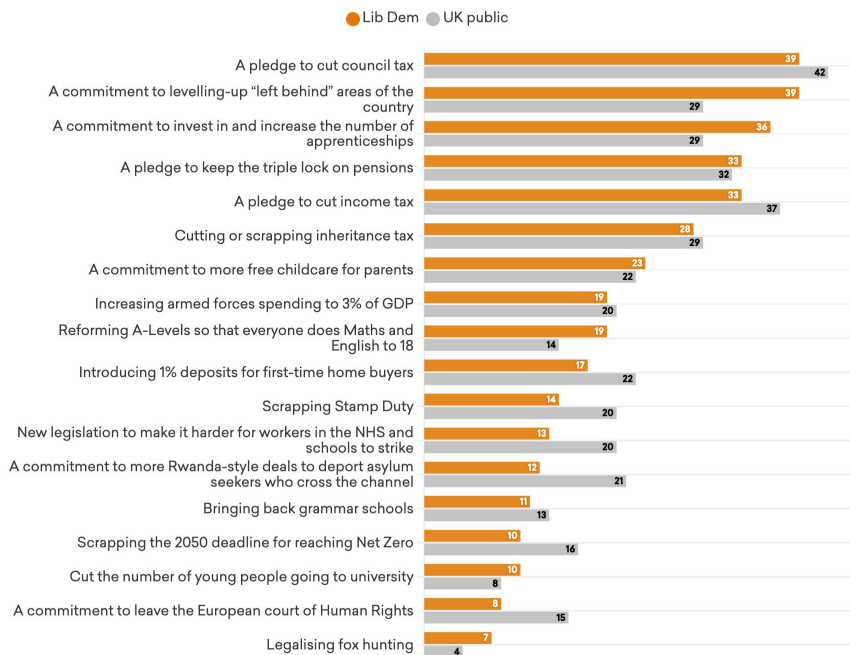
Liberal Democrat supporters agree with a number of the hypothetical Labour policies we tested. They are extremely supportive of Labour proposals for £28 billion of green spending and the abolition of the non-dom tax breaks. And placing a cap on the costs of social care is their second highest among these three top policy priorities.

Whereas Liberal Democrat supporters are in line with public opinion on most of these policies, they are far more supportive of proposals to rejoin the EU Single Market and Customs Union, and to restore foreign aid spending to 0.7% of GDP. Whereas measures on anti-social behaviour is the public's most popular policy from this hypothetical manifesto, this is less popular with Liberal Democrat supporters.

Which policies would Liberal Democrat voters want to see in the Conservative manifesto?

Liberal Democrat voters' top policies for a Conservative manifesto

The following are policies which some have proposed for the Conservative Party's manifesto at the next general election. Which of these would you most like to see...



While Labour policies are popular with Liberal Democrats, many of our hypothetical Conservative policies do not resonate with Liberal Democrat voters as much as they do with the wider public. For example, tax cuts, net-zero rollbacks, and anti-immigration measures are all much more popular with the wider public than they are with Liberal Democrat voters.

Investment in social mobility - through levelling up, apprenticeships and A-Level reform - are particularly popular potential Conservative policies for Liberal Democrat voters.

When comparing how these two hypothetical manifestos land with Liberal Democrat voters, it is clear that Labour policy is more closely aligned with Liberal Democrat voting intention than Conservative policy - which makes sense given that a quarter are voting Liberal Democrat specifically to get the Conservatives out.

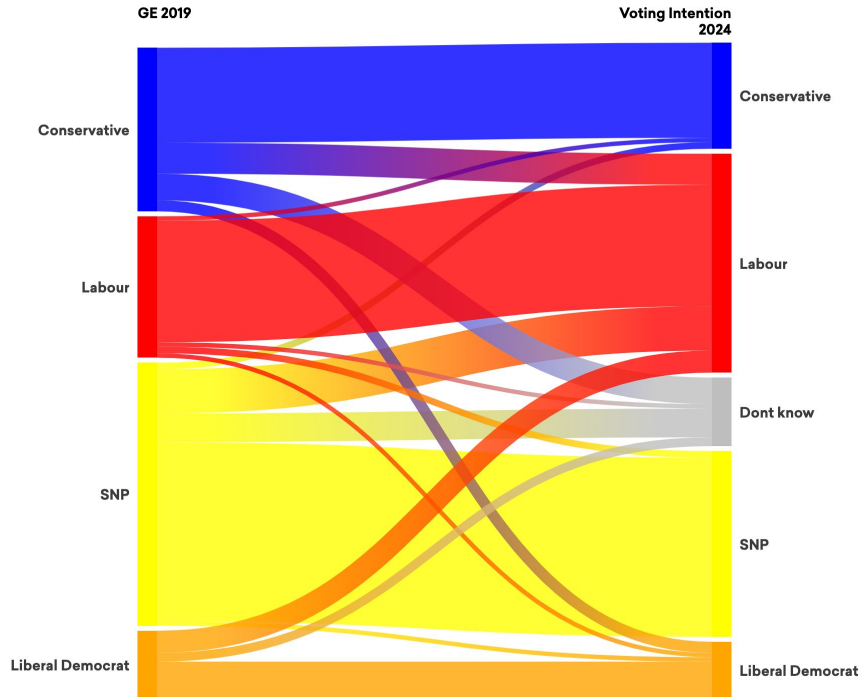
Group 7

SNP Voters



How have voting dynamics changed since 2019 in Scotland?

Where have 2019 voters gone in Scotland?



Source: More in Common

Voters have been particularly volatile since the 2019 General Election in Scotland.

The Conservatives have lost almost half of their 2019 voters in Scotland, mostly to Labour or “don’t know”.

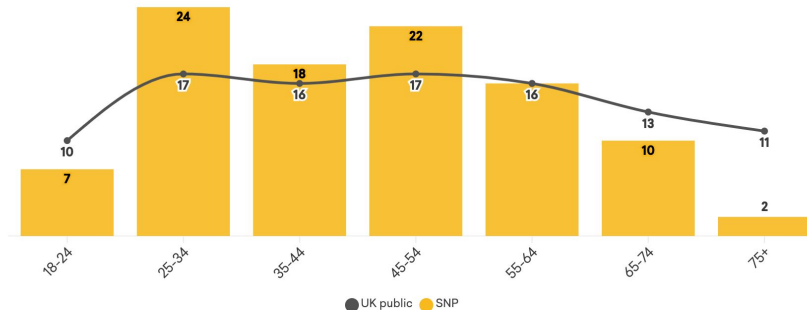
Labour has made significant gains, picking up sizeable groups of voters from both the Conservatives and the SNP. Labour in particular benefit from the large number of reasons that different groups might vote tactically for them in Scotland - whether it is Conservatives hoping to get the SNP out, or SNP supporters for whom their desire to get the Conservatives out in Westminster now trumps their nationalism in Scotland.

The SNP has also lost a significant group of their 2019 supporters - 16 per cent to Labour and 10 per cent to “Don’t know”. Those that do remain are the most pro-independence of the SNP’s 2019 base.

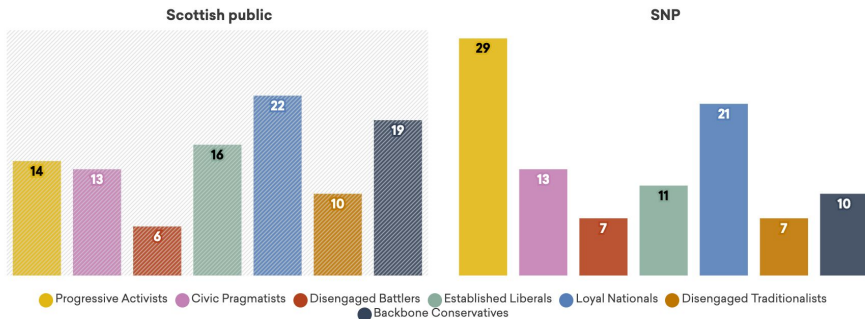
Who are SNP voters?

SNP voters are slightly younger than the country on average. They are disproportionately drawn from the Progressive Activist segment, although they also contain a large number of Loyal Nationals. The overwhelming majority (80 per cent) of those who now intend to vote SNP also voted SNP in 2019, although since 2019, the SNP have lost 17 per cent of their voters to Labour.

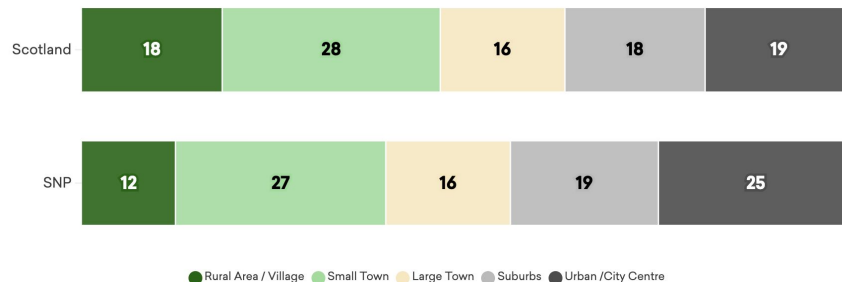
SNP voters by age



SNP voters by segment



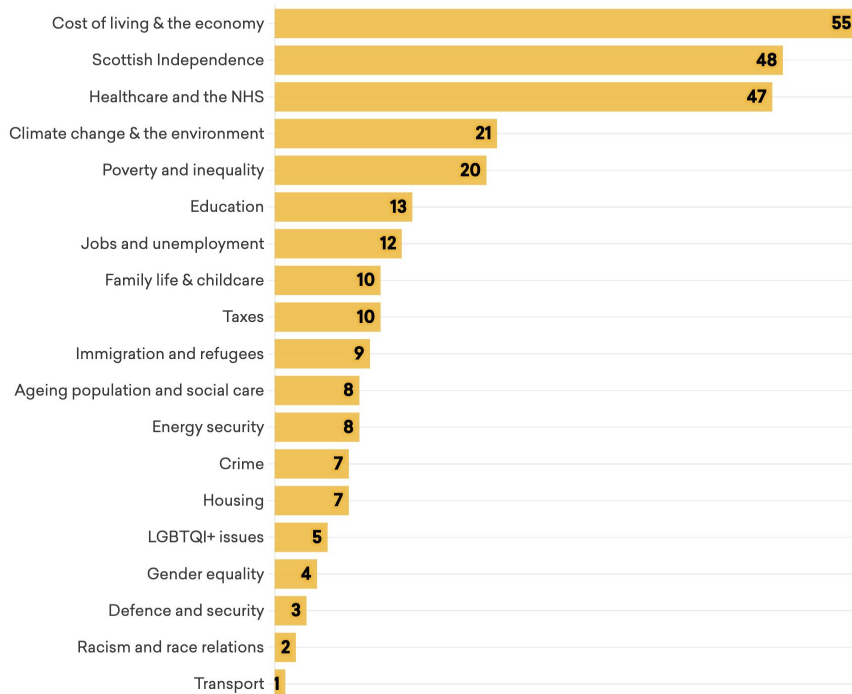
SNP voters by rurality



What issues do SNP voters care about?

SNP voters' top issues

NOTE: Different list of options asked in Scotland



Like voters in the rest of the UK, SNP voters care first and foremost about the cost of living and the NHS. However (perhaps unsurprisingly), they are unique in ranking Scottish independence as their second most important issue - in contrast, this is the tenth issue chosen by Scottish Labour supporters and selected by only 9% of them.

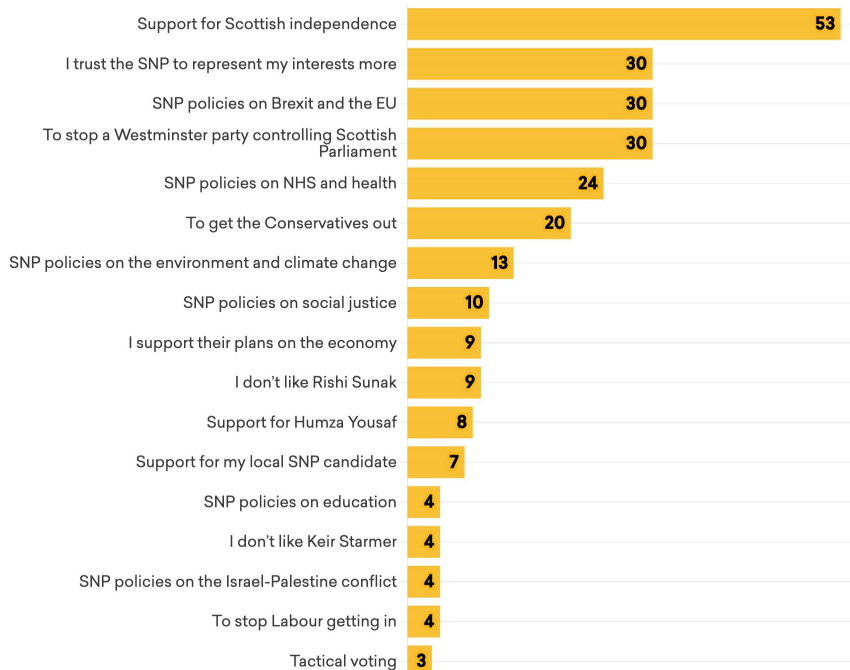
Beyond independence, SNP voters are roughly in line with Scottish public opinion. They are significantly less concerned about immigration (ranking 10th for SNP voters and 6th for Scotland in general). They are also less likely to list defence and security as a top issue.

The broad range of secondary issues that SNP supporters select is evidence that the SNP's remaining voters are sticking with the party mostly for its views on independence. 2019 SNP voters who do not select independence as a top issue have switched to Labour in far greater numbers than their counterparts who care more about independence.

Why are people voting for the SNP?

Reasons for voting SNP

You said you would vote for the SNP. What are the most important factors in your decision to vote for the SNP? Select up to three



When asked why they support the SNP, the single-issue nature of support for the SNP becomes starkly clear – independence is given as the reason why a majority of those voting intend to support the SNP.

Substantive SNP policy proposals not related to Scottish sovereignty do not fall into the top four motivations for SNP voters. On policy, a quarter mention health policy and a tenth mention climate policy as reasons to vote for the SNP.

Tactical voting is a significant motivator for some SNP voters – around a fifth of them intend to vote for the SNP to get the Conservatives out.

Personal politics does not seem to be playing the same role in Scotland as it did in 2019, or as it is currently doing in other parts of the country. Very few SNP voters are voting SNP out of support for Humza Yousaf (8 per cent), which is striking given the popularity of his predecessor Nicola Sturgeon. Simultaneously, dislike for Rishi Sunak or Keir Starmer is not a large motivator for SNP support.

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Group 8

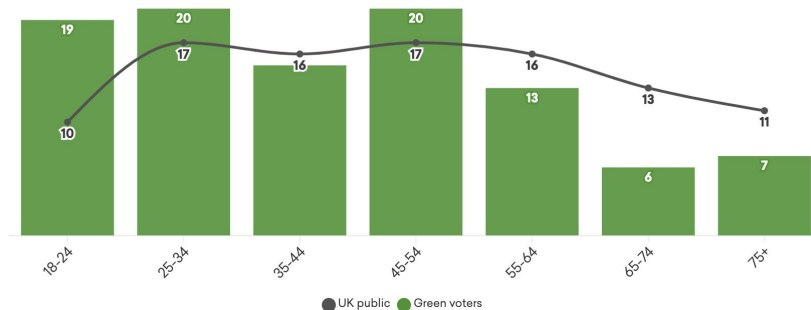
Green Party voters



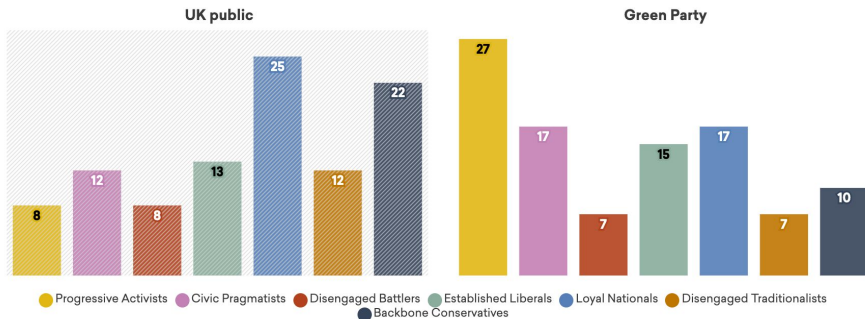
Who are Green Party voters?

Green party voters skew younger than the wider population. They are heavily drawn from the Progressive Activist segment, although all segments are represented within them - notably, one in ten Green Party voters are Backbone Conservatives. Green Party voters are more urban than the wider population, but also found in rural areas and villages - they are less likely to live in suburbs and towns.

Green Party voters by age



Green Party voters by segment



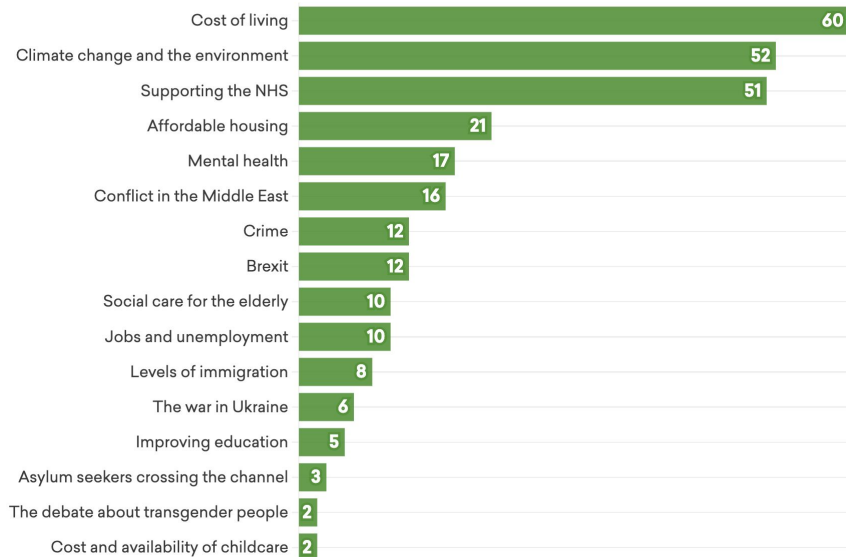
Green Party voters by rurality



What issues do Green Party voters care about?

Like all voter groups, Green Party voters rank the cost of living as the top issue facing the country. But they are unique in placing climate change second, and as the top priority for a future government. Green supporters also care about the NHS, housing and mental health more than the UK public, and are much less likely to prioritise immigration or cutting taxes.

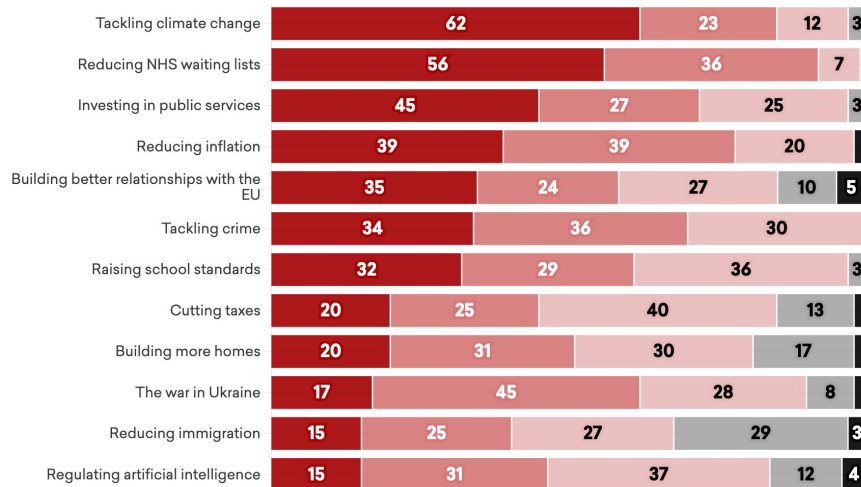
Green Party voters' top issues



Green Party voters' priorities for the next Government

Regardless of who you plan to vote for, how much of a priority do you think each of the following should be for the next Government:

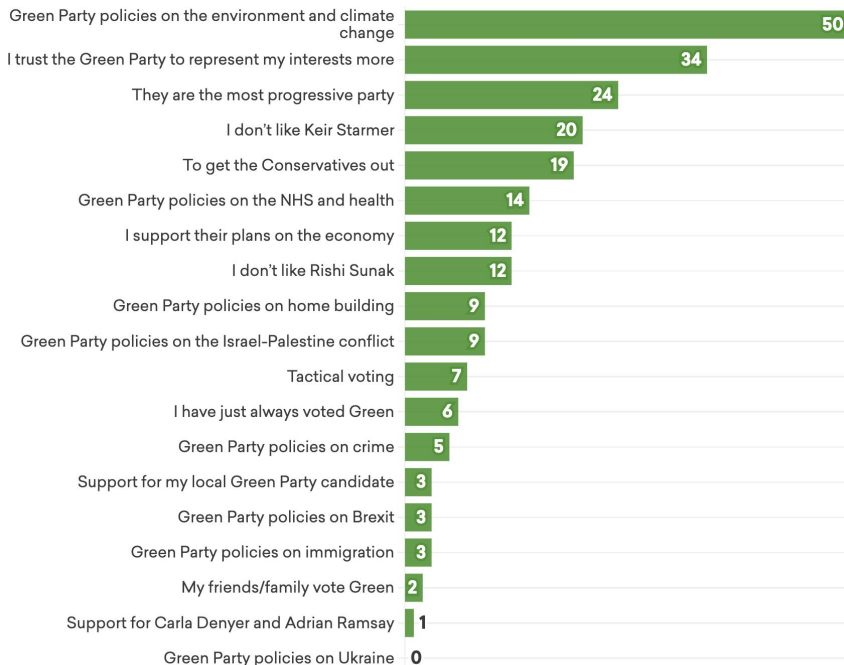
● Top priority ● Important but not top priority ● One of many priorities ● Not a priority at all ● Don't know



Why are people voting Green?

Reasons for voting Green

You said you would vote for the Green Party What are the most important factors in your decision to vote for the Green Party? Select up to three



Unsurprisingly, the top issue that people give for voting Green is their policies on climate change - although this is only selected by half of Green Party supporters, suggesting there is a more complex set of reasons driving their support.

Significantly, a fifth of Green Party voters will vote Green out of dislike for Keir Starmer. This may well mirror the 17 per cent of the Green Party's current supporters who voted for Labour under Jeremy Corbyn at the last election. Progressive Activists are the only Segment to have swung away from Labour since 2019, and presently make up the majority of Green Party voters. It is clear that the Green Party will attract anti-Starmer left-wing voters in 2024, although the extent to which this benefits them electorally remains to be seen.

Green Party policies on other areas have not cut through with their supporters. Policies on health, the economy, home building and Israel-Palestine are only motivating factors for 14 to 9 per cent of supporters.

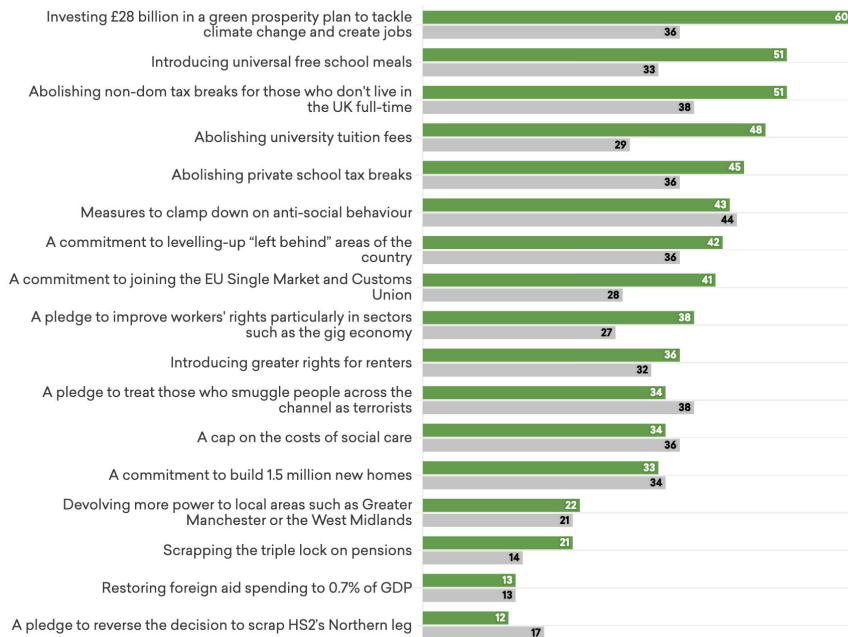
The party's leadership is also not a big pull - only 1 per cent selected that as a reason for voting Green.

What would Green Party voters want to see in a Labour Party Manifesto?

Green Party voters' top policies for a Labour manifesto

The following are policies which some have proposed for the Labour Party's manifesto at the next general election. Which of these would you most like to see...

● Green Party voters ● UK public



Green Party supporters are generally supportive of the policies in Labour's hypothetical manifesto - including most notably the £28bn pledge, as well as measures on social justice such as free school meals and abolishing the non-dom tax status.

On a number of hypothetical Labour policies - particularly those including higher government spending - Green Party supporters are much more enthusiastic than the UK public as a whole. These include abolishing tuition fees and introducing universal free school meals. Green Party supporters' demands on these issues are unlikely to be met by the current Labour leadership, suggesting that there is limited space for Labour to win back some of these voters other than through an appeal to anti-Tory tactical voting.

Compared to the UK public, policies on anti-social behaviour and tackling people smugglers are slightly less popular among Green Party supporters, although these differences are not as large as you might expect.

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Further information:

luke@moreincommon.com

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Sign up to our newsletter

Appendix

The British Seven Segments



Our unique lens - The British Seven Segments

- The 'British Seven' segments were formulated in our 'Britain's Choice' report, published in 2020
- They are created entirely from questions around five areas of core beliefs, drawn from social psychology: group identity and tribalism, perceived threat, parenting style and authoritarianism, moral foundations, personal agency and responsibility
- No demographic information (race, class, or gender) is used for the segmentation, though the segments created by this process often have demographic differences
- Segmentation shows that values and beliefs are powerful in influencing how individuals form opinions about issues and their behaviour. Often, the segments are more predictive of beliefs than any other metric

Group Identity and Tribalism

Perceived Threat

**Parenting Style and
Authoritarianism**

Moral Foundations

**Personal Agency and
Responsibility**

The British Seven Segments

Progressive Activists



...a group for whom politics is an important part of their identity and who seek to correct longstanding injustices

Civic Pragmatists



...a group that cares about others, at home or abroad. They wish for less conflict and more compromise

Disengaged Battlers



... a group that are just getting by. They blame the system for its unfairness, but not other people

Established Liberals



...a group that has done well and means well towards others, but also sees a lot of good in the status quo

Loyal Nationals



...a patriotic group, who worry that our way of life is threatened and also feel our society has become more unfair

Disengaged Traditionalists



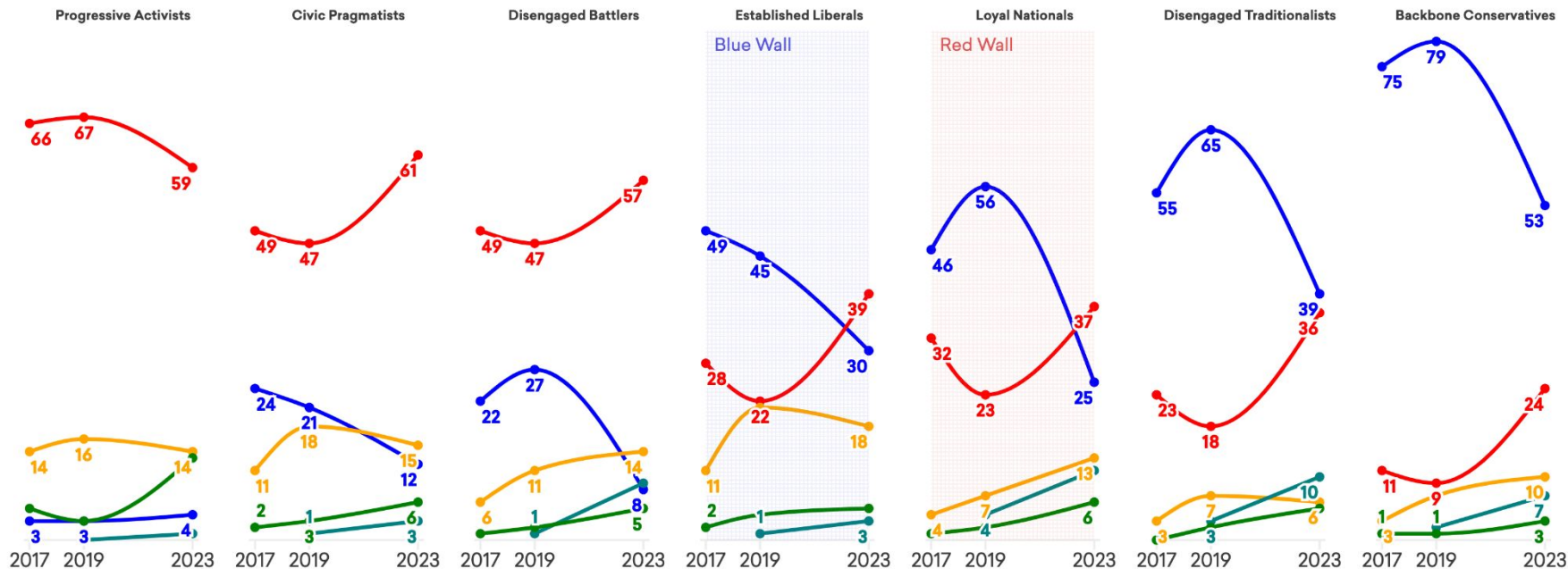
...a group that values a well-ordered society and prides in hard work. They want strong leadership that keeps people in line

Backbone Conservatives



... a group who are proud of their country, optimistic about Britain's future outside of Europe, and who keenly follow the news

The seven segments at a General Election

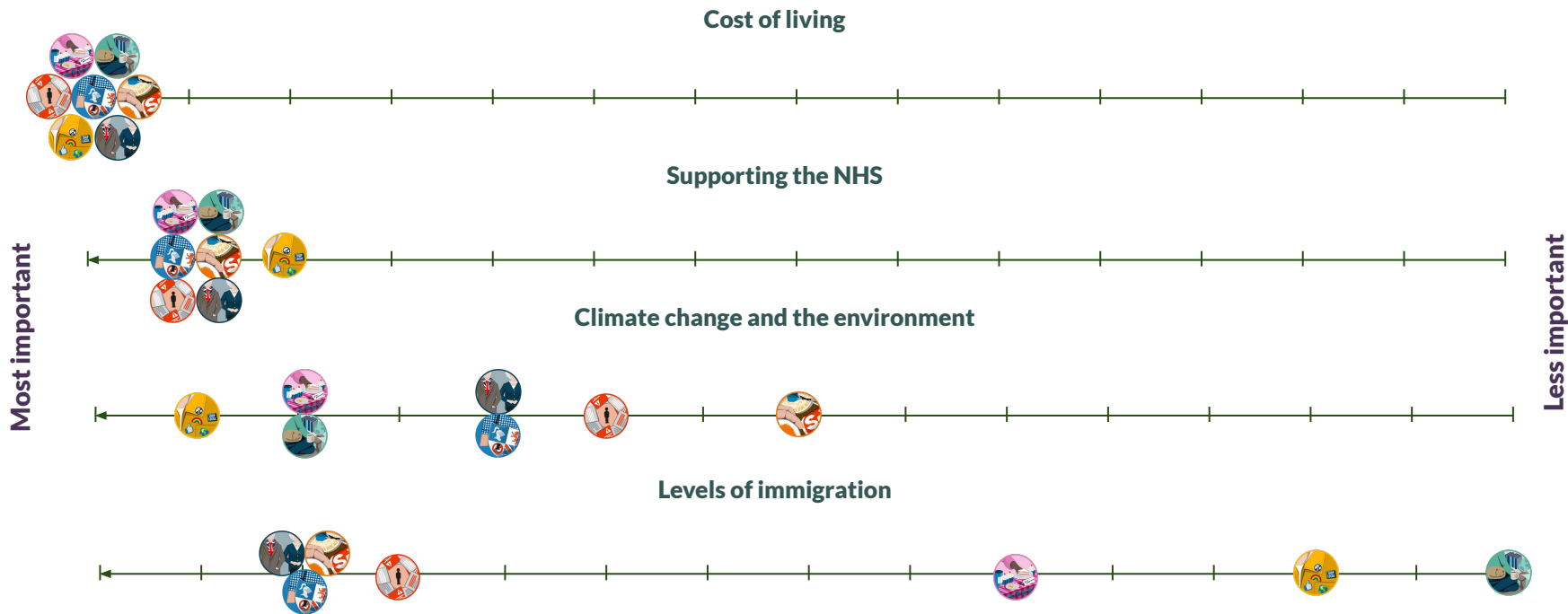


Labour's 2019 coalition

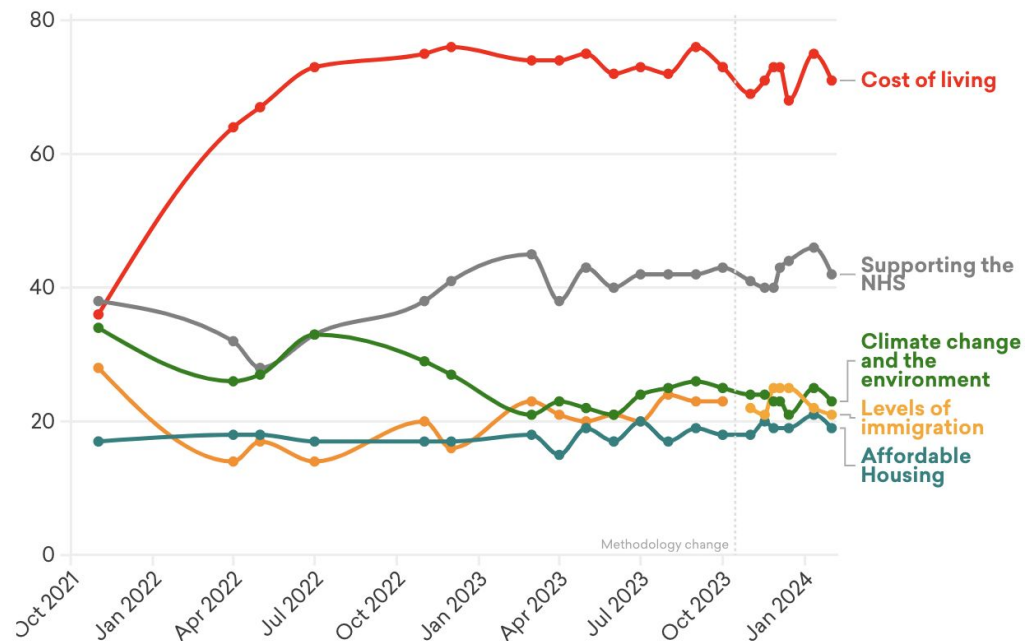
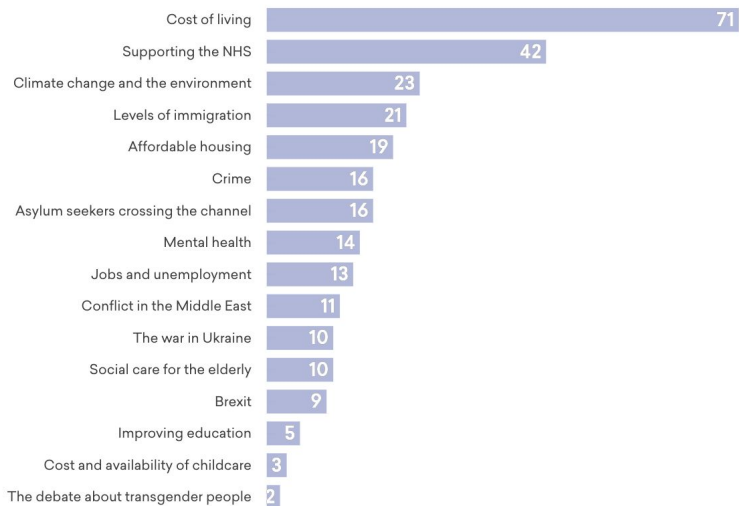
Potential 2024 coalition

Britons' big issues - January 2024

All segments are primarily concerned with the cost of living and NHS. But climate change is also a high concern for most segments, whereas immigration is more polarising.



Britons' big issues



Cost of living and supporting the NHS are by far the most important issues identified by Britons. They defined the last two years, and they will define the next General Election.