



More in
Common

Can Badenoch turn the Conservatives around?



Monday 5 October



16:15 to 18:00



Sonata Room, Hyatt
Regency, Secure Zone



Lord Finkelstein
(Chair)
The Times



Nick Timothy MP
Shadow Justice
Secretary



Kevin Hollinrake MP
Chairman of the
Conservative Party



Baroness Davidson
Prosper UK, and
former Leader of the
Scottish
Conservatives



Alex Burghart MP
Deputy Leader of
the Conservative
Party



Chris Philp MP
Shadow Home
Secretary



Victoria Atkins MP
Shadow
Environment
Secretary



Luke Tryl
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Introducing the seven segments

An abstract graphic on the right side of the slide. It features a dark blue background with several overlapping circles. Two large circles are outlined in a light blue color. Within these circles, there are segments of different colors: a medium blue segment in the upper right and a green segment in the lower right. The overall composition is modern and geometric.

Introducing the seven segments

The British Seven segments were developed to move beyond traditional left-right or party-based analysis by exploring the deeper psychological, cultural and value-driven foundations that shape public opinion. This approach helps explain why political loyalties have fractured and offers a more nuanced understanding of what drives attitudes on issues like immigration, climate, and the economy—enabling more effective engagement with the public across a fragmented political and social landscape.



Progressive Activists



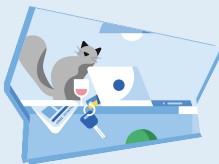
...an outspoken group that is politically engaged and globally minded, championing social justice but feeling alienated from mainstream politics

Incrementalist Left



...a group that leans left and trusts institutions, often stepping back from the news and avoiding politically fraught debates

Established Liberals



... a prosperous group that is confident in institutions, values expertise, and believes the system broadly works

Sceptical Scrollers



...a disengaged group that has lost trust in mainstream institutions and increasingly looks online for sources of truth

Rooted Patriots



...a patriotic group that feels overlooked by elites and wants leaders with common sense to protect local identity

Traditional Conservatives



... a nostalgic group that respects tradition, authority and personal responsibility, while remaining sceptical of rapid change

Dissenting Disruptors

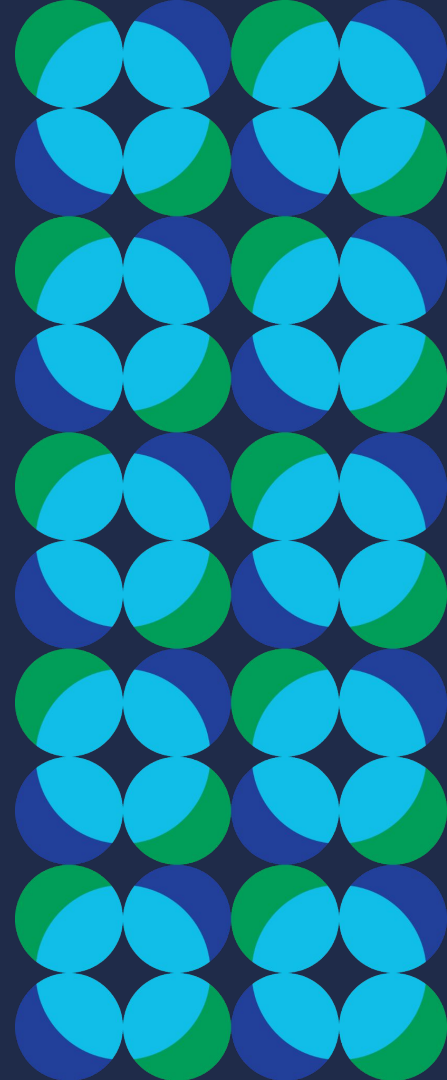


... a frustrated group that craves radical change and backs strong leaders who promise to shake up a broken system



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The state of the party



Kemi Badenoch has broken through – but has not lifted her party's fortunes

A year ago, the Conservatives' main challenge was for Kemi Badenoch to get a hearing; now it's turning Badenoch fans into Conservative voters.

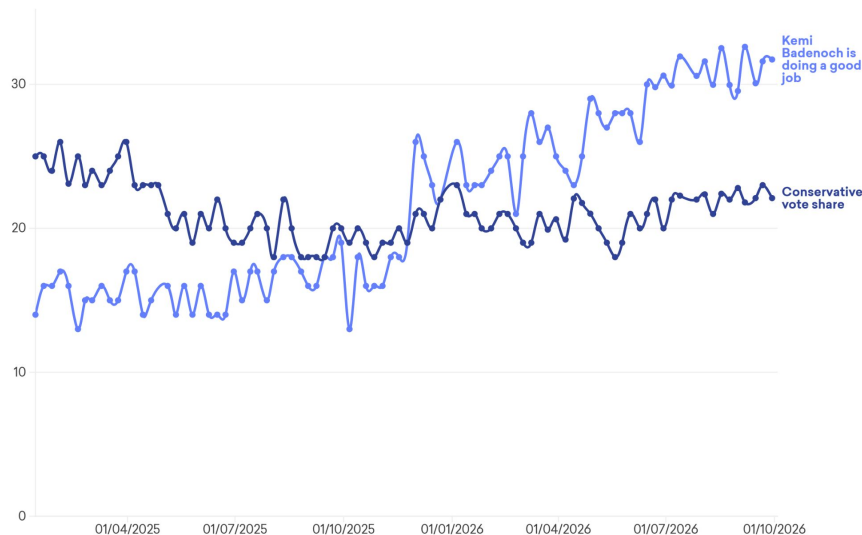
Kemi Badenoch's approval rating has soared in recent months; she is now one of only two party leaders with a net positive approval, and **Reform voters in particular have warmed to her.**

But much as Andy Burnham is outperforming the Labour Party, so too is Kemi Badenoch outperforming the Conservatives. Attitudes toward the Conservative leader have decoupled from support for her party: **of all those who believe Kemi Badenoch is doing a good job, only a third (34 per cent) say they would vote Conservative in an election tomorrow.**

Badenoch's approval has risen; the Conservatives' support has been slower to rise

(Proportion who think **Kemi Badenoch is doing a good job**, compared with **Conservative vote share**)

For each of the following, please indicate whether you think they are doing a good job or a bad job?



Some see Badenoch as a 'breath of fresh air'

In focus groups, many voters on the right describe Badenoch as a refreshing politician, someone unafraid to 'say it as it is'.

In particular, her performances in the House of Commons have helped her to break through as an effective Opposition leader. Two in five Britons say they have seen Kemi Badenoch doing PMQs in the past year, and those who have are far more likely to describe Badenoch as 'intelligent', 'professional' and 'principled'.

To me, she feels like a breath of fresh air. I'm not saying that that means necessarily that I would vote Conservatives, but the way she presents herself online, in interviews, in the house when she's doing question time each week and PM's, questions. To me, she presents herself really well and her arguments sometimes are really strong.

James, police officer, Northamptonshire

In a word or two, how would you describe Kemi Badenoch?



 More in Common

25 - 29 September 2024

"She's like Margaret Thatcher with a sense of humour."

Jill, retired, Makerfield

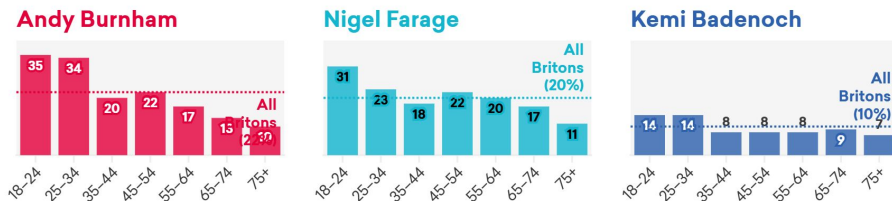
Badenoch doesn't cut through on social media – but her PMQ performances are impressing voters

Kemi Badenoch doesn't receive as much social media traction as her rivals: only one in ten Britons saw her on social media in the past week – half the figures for Farage or Burnham.

Yet two in five Britons (39 per cent) saw Badenoch on PMQs in the past year, and those who did are impressed: those who have seen her in PMQs are twice as likely to say she is doing a good job (whereas Burnham's approval does not move); they are also more likely to describe her as intelligent, professional, principled and decisive.

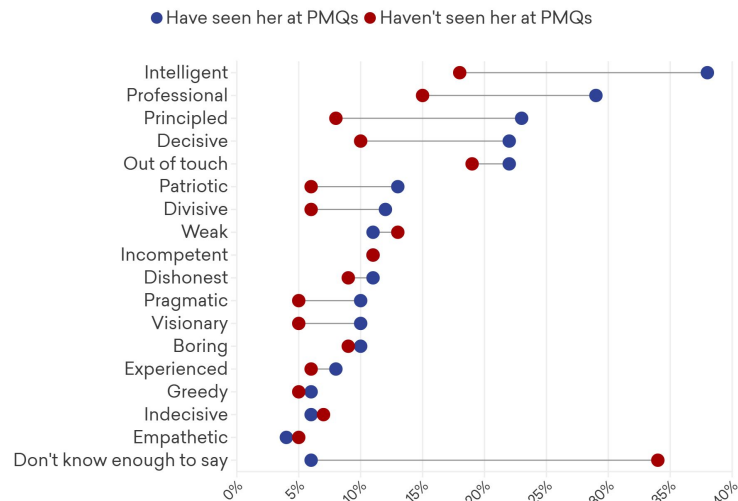
Only 1 in 10 Britons saw Kemi Badenoch on social media last week

In the past week, which of these political figures have you seen content from on social media?
(By age)



Britons who've seen Kemi Badenoch at PMQs are twice as likely to call her intelligent, professional and principled

Which of the following words would you use to describe Kemi Badenoch? (Select up to three)



Britons like Badenoch's robust style of debate – but for some, there is a risk it could go too far

In focus groups, there is a clear split in attitudes toward Kemi Badenoch's style of debate: most right-leaning voters enjoy her robust, humorous approach as Leader of the Opposition; but some feel that it goes too far, or is seen to be 'point scoring'.

Britons were split down the middle on Badenoch's "spiteful class warrior" comments about Bridget Philipson: 38 per cent said they were acceptable, while 38 per cent said unacceptable. Two-thirds of Conservative voters said they were acceptable – although a quarter said they were not.

*It could be that **you will ruffle some feathers, but I think that actually that's what we need, because something's got to change now.***

Fiona, not working, Lincolnshire

If Labour said the sky is blue, Kemi will say, no, it's not, it's green. She's argumentative for the sake of being argumentative.

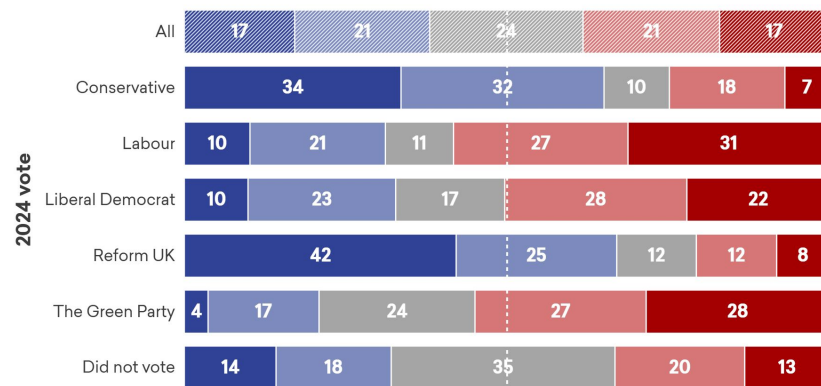
Rob, operations manager, Lincolnshire

Britons are split on whether Badenoch's 'spiteful class warrior' comments were acceptable

Conservative Party leader Kemi Badenoch cited a poll of teachers which found that 0% thought she was doing very well and called the Education Secretary a "spiteful class warrior" because of her policies.

How acceptable or unacceptable do you find Kemi Badenoch's comments?

● Entirely acceptable ● Somewhat acceptable ● Don't know
● Somewhat unacceptable ● Entirely unacceptable



But for many, the Conservative brand is still toxic

A common refrain in focus groups is that voters on the right like Kemi Badenoch, but lament that she is leader of the Conservative Party.

For some, this is the legacy of the previous government. In focus groups, some describe the Conservative Party as an “empty shell” of a party – or say that it has “burned all its bridges”.

She's fantastic. (...). But like I say, she's head of an empty party. It's a shell of a party really, isn't it? (...) They need to reinvent themselves.

They found a good leader, but need to reinvent themselves because obviously they've got lots of other competition now, haven't they?

Sam, social services, Stretford

*I think that she's taken a party that's **burnt their bridges too many times**. (...) So she seems to know what to do, but at the moment she's third. **And it's a long way to bring it back.***

Terry, retired, Haughton Green

In a word or two, how would you describe the Conservative Party?



More in Common

25 - 29 September 2024

*“There’s no shilly-shallying with her. I think she speaks sense and she’s the only politician I’ve ever listened to that, when she’s asked a question... actually answers straight away (...) And **if you didn’t know which party she was head of, I agree with a lot of the things she said.**”*

Cheryl, interior designer, Hale

The Conservative brand is showing signs of recovery

On a handful of key metrics, perceptions of the Conservative Party have improved since last year's party conference.

Since last year the proportion saying that the Conservatives feel 'genuinely different' from when Rishi Sunak was leader has risen from 25 per cent to 38 per cent now.

The number saying that the Conservatives position is 'irrecoverable' has fallen from 44 per cent to 40 per cent.

And since May of this year, the share who think the Conservatives are the main party of the right has risen from 17 per cent to 25 per cent.

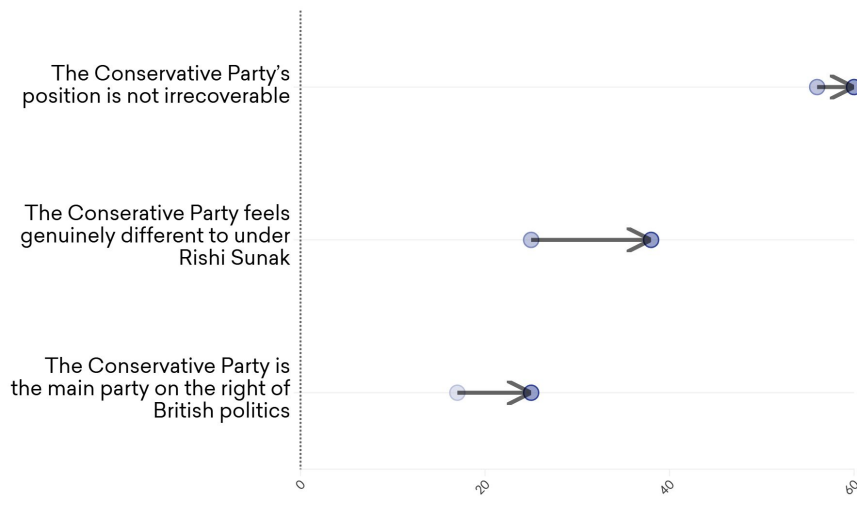
At the moment, I feel like I'm personally swinging back to being a conservative voter again... I feel like they have a plan to make real change. Now, we all know that parties make promises and tend not to follow through on them, but it feels like there is a plan to make change, whether that comes to fruition or not.

James, police officer, Northamptonshire

On many key metrics, the Conservative Party's brand is improving

Proportion who agree with each statement

● September 2025 ● September 2026 ● May 2026

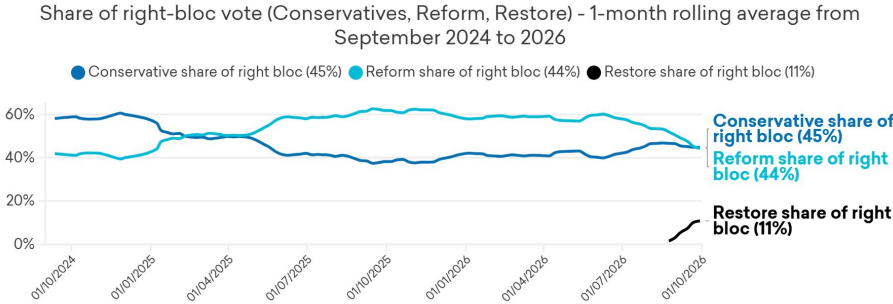


The Battle for the Right is neck-and-neck

A year ago, Reform held over 60 per cent of the right-bloc vote. Today it is level with the Conservatives (44 per cent to 45 per cent), with Restore Britain on 11 per cent.

Perceptions are shifting too: since May, the share of Britons naming Reform as the main party on the right has fallen from 43 per cent to 35%, while the Conservatives have risen from 17 per cent to 25 per cent. The shift has been biggest among those who backed the Conservatives in 2024.

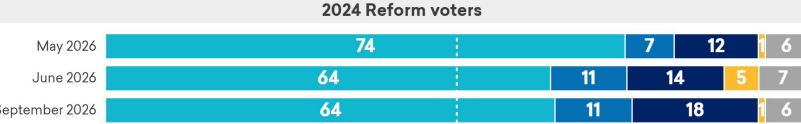
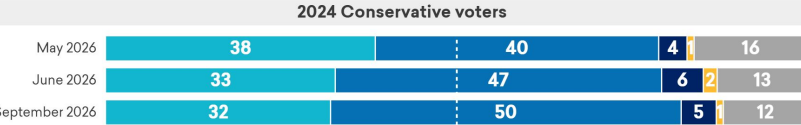
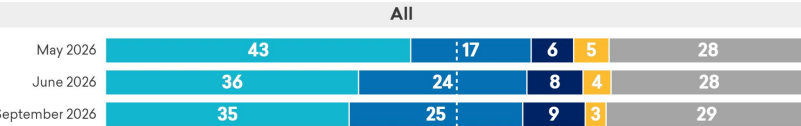
The Conservatives and Reform are now neck and neck on the right



A growing minority of Britons consider the Conservatives - not Reform - the main party on the right

Which political party do you think is the main party on the right of British politics?

Reform UK The Conservative Party Restore Britain The Liberal Democrats Don't know



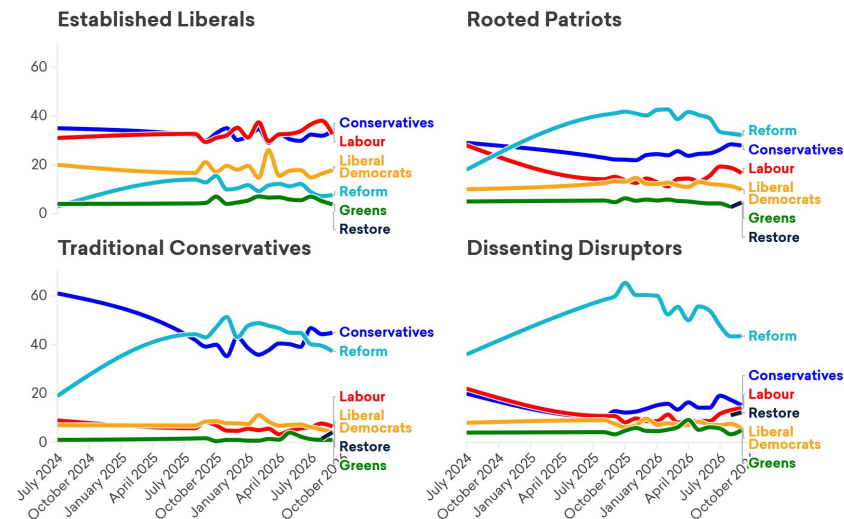
Badenoch is performing well across the right and centre

The Conservative Party is expanding its support towards both the centre and the right. It has reconnected with its core segment, Traditional Conservatives. After trailing Reform UK in this group for most of the past year, it now leads by 45 per cent to 37 per cent. Among Established Liberals, the Conservatives are once again tied with Labour, by 34 per cent to 33 per cent. Among Rooted Patriots, Reform UK's lead over the Conservatives has narrowed from 18 points to just four.

Badenoch is net popular with three of the seven segments—Traditional Conservatives, Rooted Patriots, and Established Liberals. She is also close behind with the Incrementalist Left and Dissenting Disruptors.

The Conservative Party has regained ground among Traditional Conservatives, Established Liberals and Rooted Patriots

Monthly average voting intention, omnibus polling only, August 2025 to September 2026



The Conservatives have a high ceiling

With 22 per cent of the vote, the Conservatives are five points behind Labour. An election tomorrow would likely be even worse than their historic 2024 loss. **But alongside those currently supporting the party, an extra 22 per cent of likely voters would *consider* backing them.**

Taking current voters and considerers together, 44 per cent of voters are reachable for the Conservatives in theory – compared to 45 per cent for Labour and 38 per cent for Reform UK.

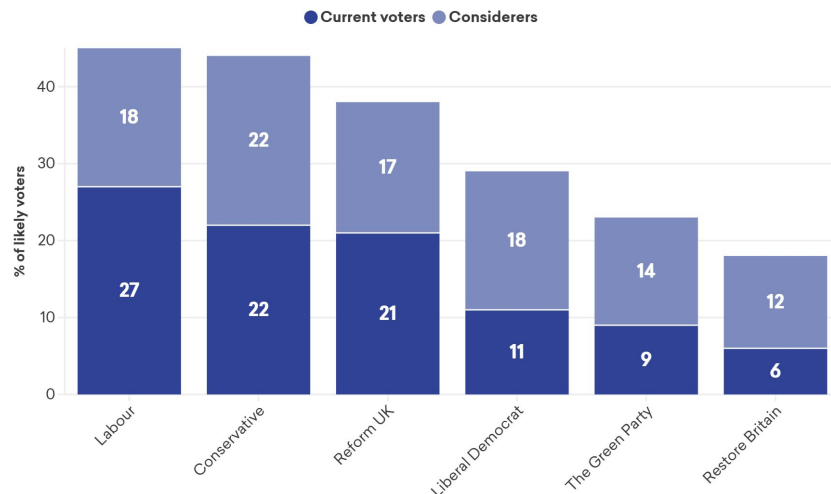
I think I've gone from conservative back, now I'm back, I feel like that would be the route I would go again.

Sandra, retired, Northamptonshire

The Conservatives have the joint biggest pool of potential voters

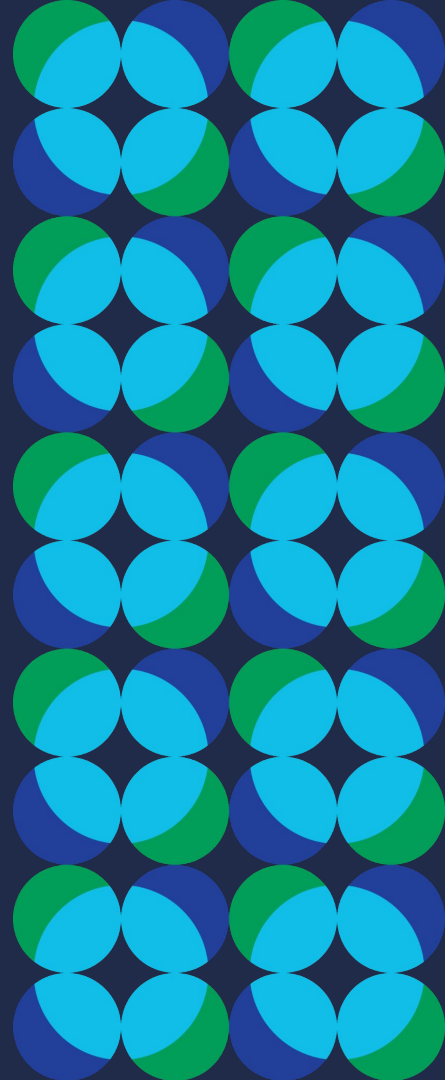
Respondents who say they would vote for [this party] if there was an election tomorrow, alongside respondents who would 'consider' voting for [this party]...

[Consider party Q: Which other parties might you consider voting for?]





The Conservatives' changing voter coalition



Established Liberals (9% of the population, 14% of Conservative voters)

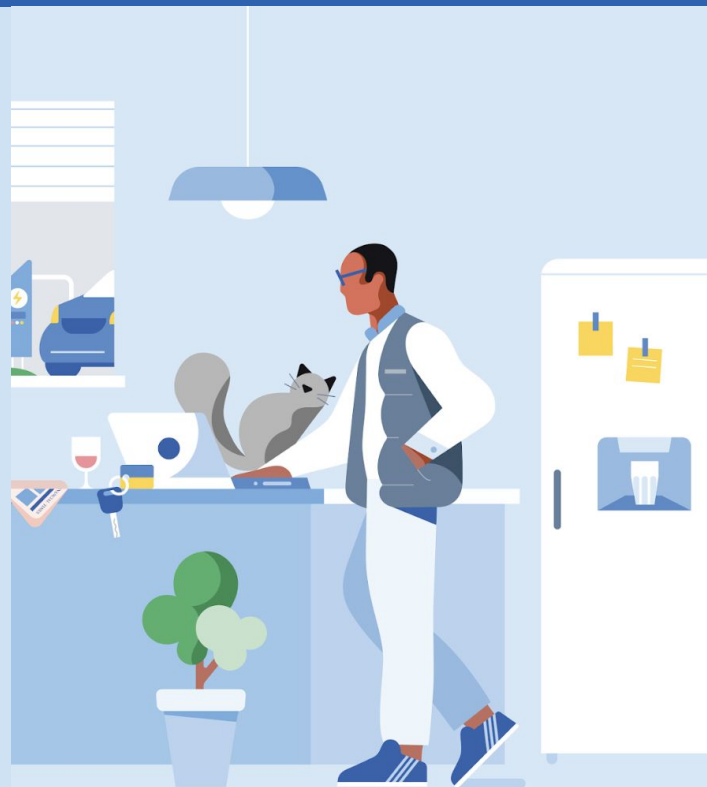
Key words: secure, internationally-minded, trusting, liberal, meritocratic, comfortable, optimistic

Top strengths of the Conservatives: creates economic stability (31 per cent), maintains British tradition and culture (22 per cent), stands for hard work and success (20 per cent).

Top barriers to voting Conservative: Partygate and other scandals (20 per cent), their record on Brexit (20 per cent), their record on public services (18 per cent).

20 per cent trust Kemi Badenoch more than the Conservative Party, 17 per cent trust the Conservative Party more than Kemi Badenoch, and 34 per cent trust them both about the same.

This group are metropolitan, and have some of the highest levels of trust in institutions. At the same time, they are the most economically well-off – often making them feel insulated from the current cost of living issues being faced in Britain.



Incrementalist Left (21% of the population, 20% of Conservative Voters)

Key words: liberal, compromising, conflict-averse, satisfied, community-orientated

Top strengths of the Conservatives: creates economic stability (19 per cent), looks after the middle class (16 per cent), maintains British tradition and culture (15 per cent).

Top barriers to voting Conservative: they don't understand ordinary people (28 per cent), they don't represent my values or beliefs (24 per cent), their record on Brexit (23 per cent).

19 per cent trust Kemi Badenoch more than the Conservative Party, 14 per cent trust the Conservative Party more than Kemi Badenoch, and 31 per cent trust them both about the same.

This segment has some similarities to the Progressive Activist although they are much more disengaged from politics, mostly driven by the fact that they are relatively happy with the status quo and find no joy in the news.



Rooted Patriots (20% of the population, 24% of Conservative Voters)

Top strengths of the Conservatives: puts Britain's interests before other countries (20 per cent), looks after the middle class (18 per cent), cuts immigration (16 per cent).

Top barriers to voting Conservative: they don't understand ordinary people (31 per cent), the Conservatives are more of the same (22 per cent), their record on immigration (22 per cent).

24 per cent trust Kemi Badenoch more than the Conservative Party, 11 per cent trust the Conservative Party more than Kemi Badenoch, and 31 per cent trust them both about the same.



Traditional Conservatives (8% of the population, 24% of Conservative Voters)

Top strengths of the Conservatives: stands for hard work and success (30 per cent), creates economic stability (29 per cent), cuts taxes (23 per cent).

Top barriers to voting Conservative: their record on immigration (26 per cent), their record on Brexit (14 per cent), the Conservatives are more of the same (13 per cent).

31 per cent trust Kemi Badenoch more than the Conservative Party, 12 per cent trust the Conservative Party more than Kemi Badenoch, and 41 per cent trust them both about the same.



Dissenting Disruptors (20% of the population, 14% of Conservative voters)

Top strengths of the Conservatives: looks after the middle class (16 per cent), stands for hard work and success (16 per cent), maintains British tradition and culture (16 per cent).

Top barriers to voting Conservative: they don't understand ordinary people (32 per cent), their record on immigration (28 per cent), the Conservatives are more of the same (21 per cent).

25 per cent trust Kemi Badenoch more than the Conservative Party, 10 per cent trust the Conservative Party more than Kemi Badenoch, and 27 per cent trust them both about the same.



The 2019 coalition is shattered presently by Reform, but there are signs of recovery

The enormity of the shock delivered to the Conservatives in 2024 has not dissipated and the Conservative coalition in 2019 is far from being reconstructed.

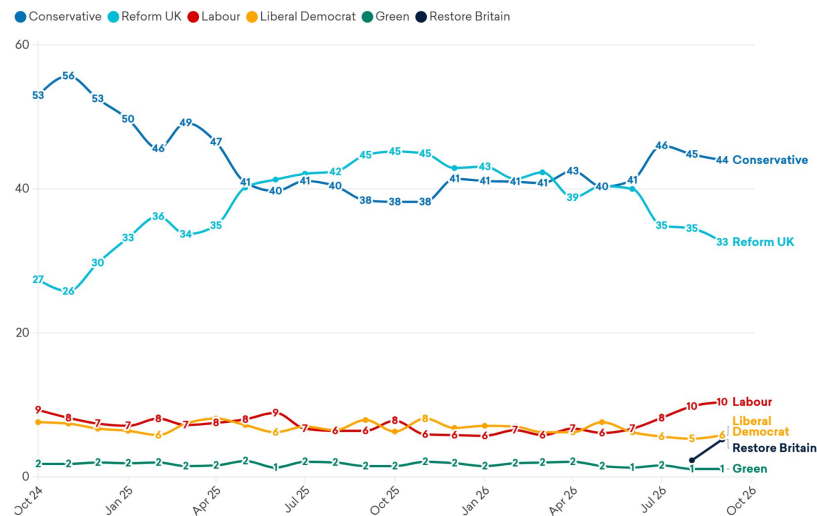
Just 44 per cent who voted for the Conservatives under Boris Johnson still intend to do so, 33 per cent are now voting Reform. A notable portion (10 per cent) are voting Labour, but the biggest movement is still to the right.

This is, however, a substantial improvement from last Autumn, where Reform lead among Conservative voters, 45 to 38.

However, in a fragmented system, a Conservative recovery does not need to win 45 per cent of the vote, they can still win large numbers of seats on a more modest vote share.

Conservatives have a narrow lead with their former 2019 coalition

Voting intention of people who voted Conservative in 2019. Monthly average.



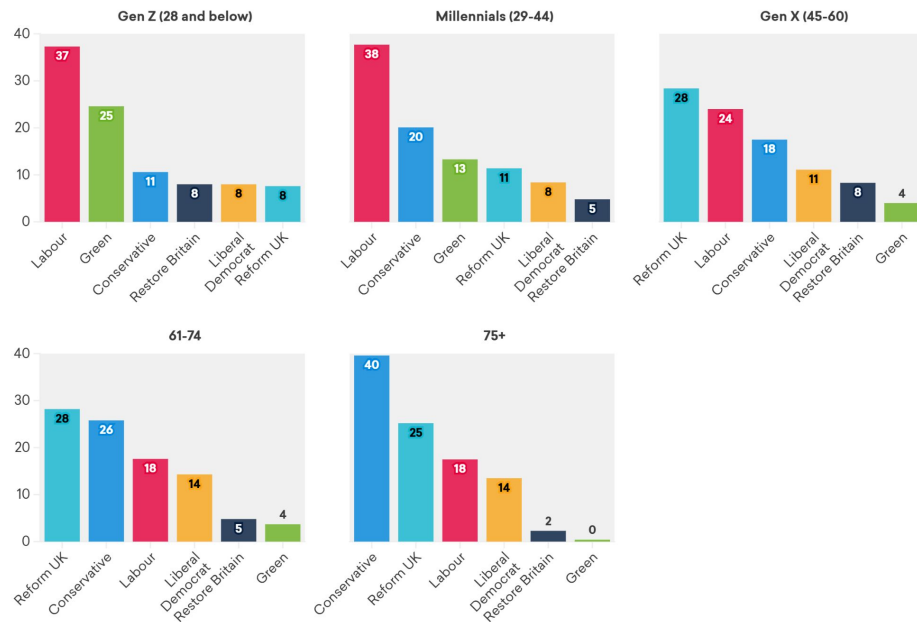
The Conservatives are recovering more with the old than the young

The Conservatives continue to seriously struggle with younger generations of voters.

The only generation where the Conservatives have a lead are the over 75s, at 40 per cent. They remain under 20 per cent with voters under the age of 60, and are polling at just 11 per cent with Gen Z.

Conservative support is strongest among those over 75

Voting intention by generation



Conservatives are doing better with women than men

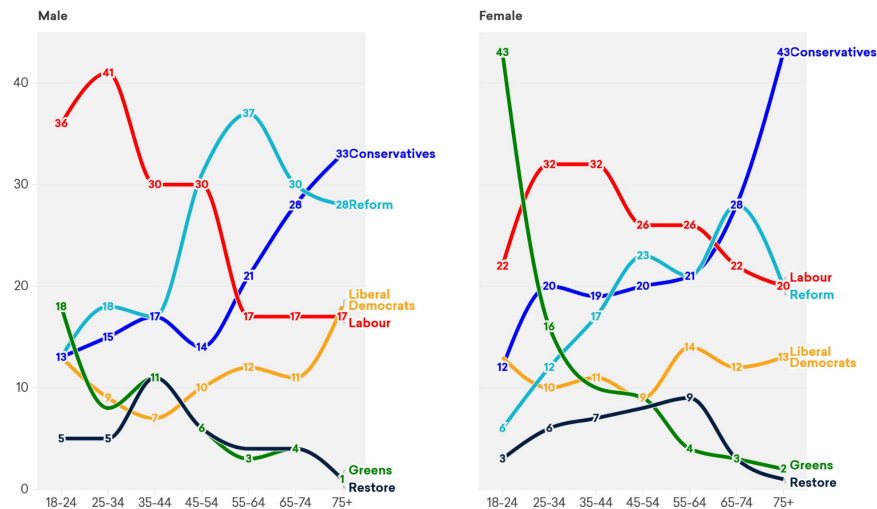
A notable gender gap has started to emerge between Reform UK and the Conservatives.

The Conservatives are roughly four points stronger with women than with men overall. But this gap is particularly strong with older women. 43 per cent of women over the age of 75 currently intend to vote Conservative. Reform are doing much worse with middle aged and older women than they are doing with men.

While the Conservatives are doing well with women, they are struggling more with men. The Conservatives do not lead Reform with any group of men except the over 75s.

Reform is far more dominant with men than the Conservatives, with Conservatives stronger among women

September 2026 voting intention



The M&S Party?

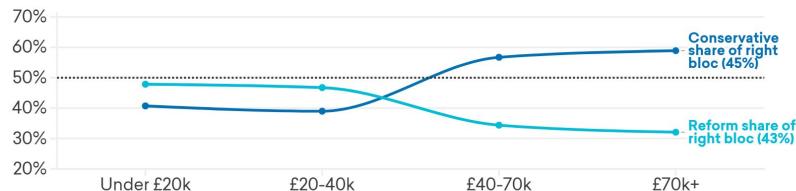
The Conservatives lead clearly among M&S shoppers and narrowly among Sainsbury's shoppers, but at no other supermarket.

That reflects their coalition. **Their vote has the steepest age gradient of any party:** they lead only among over-75s. It also skews towards higher earners. Among those earning over £40,000 they are the main party of the right; among those earning less, Reform is.

Right-leaning voters earning over £40,000 back the Conservatives - those earning less lean Reform

Share of the right-bloc vote (Conservatives, Reform, Restore), by personal income

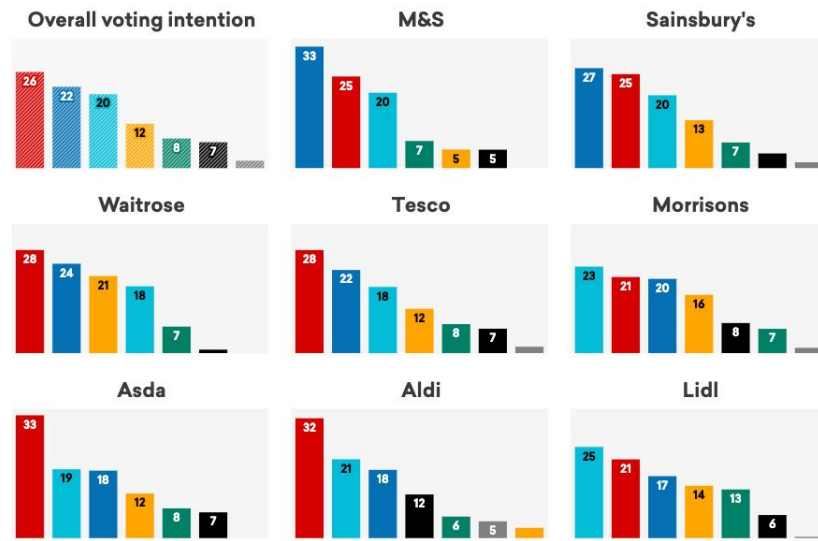
● Conservative share of right bloc (45%) ● Reform share of right bloc (43%)



Conservatives lead among people who do the weekly shop at M&S - but are behind across most other supermarkets

Westminster voting intention, by where people do their weekly food shop

● Conservative ● Labour ● Liberal Democrat ● Reform UK ● Restore Britain
● The Green Party ● Another party/Independent Candidate



Deprivation is the defining dividing line on the battle for the right

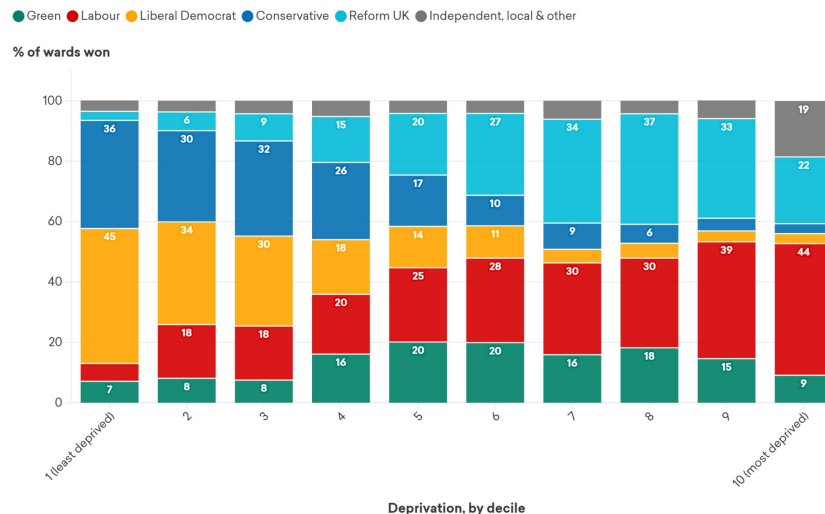
The battle for the right is broadly breaking down along lines of deprivation: the Conservatives do best in the least deprived wards, and Reform in the more deprived ones.

In the least deprived tenth of wards, the Conservatives won 36% of the councillors up for election in May, with 26% of the vote. In the most deprived tenth, that falls to just 3% of councillors and 9% of the vote.

Reform, by contrast, do best in more deprived areas. They won 15% of the vote in the least deprived wards, rising to a peak of 27% in the eighth decile of deprivation, and won between a third and 37% of councillors (33–37%) in the seventh, eighth and ninth deciles.

Conservatives won 36% of the councillors in the least deprived wards, but just 3% in the most deprived wards

Share of wards won, by number of households with at least one metric of deprivation, ONS



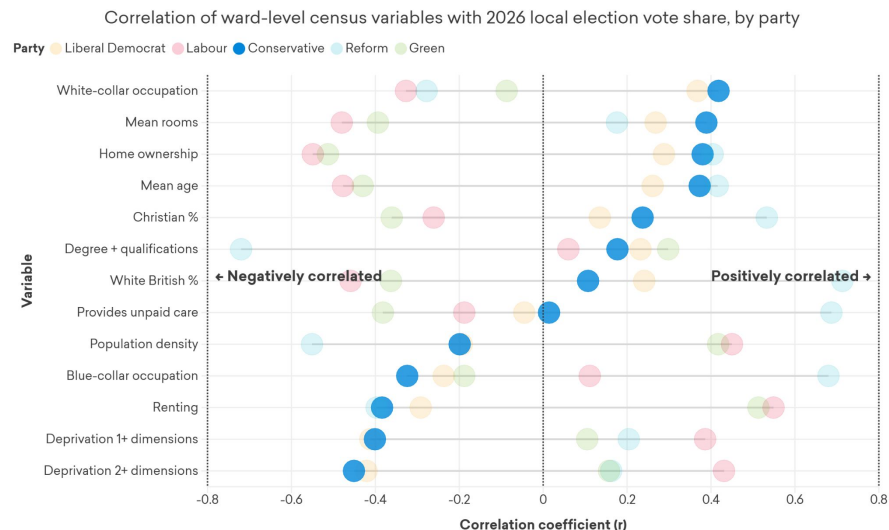
Conservatives have become the party of the white collar homeowner

Looking at local results in 2026 more closely, Conservative voters on some metrics look similar to the Liberal Democrats, and on others to Reform.

Like Reform, the Conservatives do well in whiter areas, do well with homeowners, and do well in wards with higher average ages. But, like the Liberal Democrats, the party now does markedly better in areas with high white collar occupations and areas with a high graduate population, and worse in areas with high deprivation.

If replicated at a general election, this support profile would stand the Conservatives in good stead in wealthier, more educated areas where it is competitive with the Liberal Democrats, but would struggle against Reform in more deprived former Conservative heartlands.

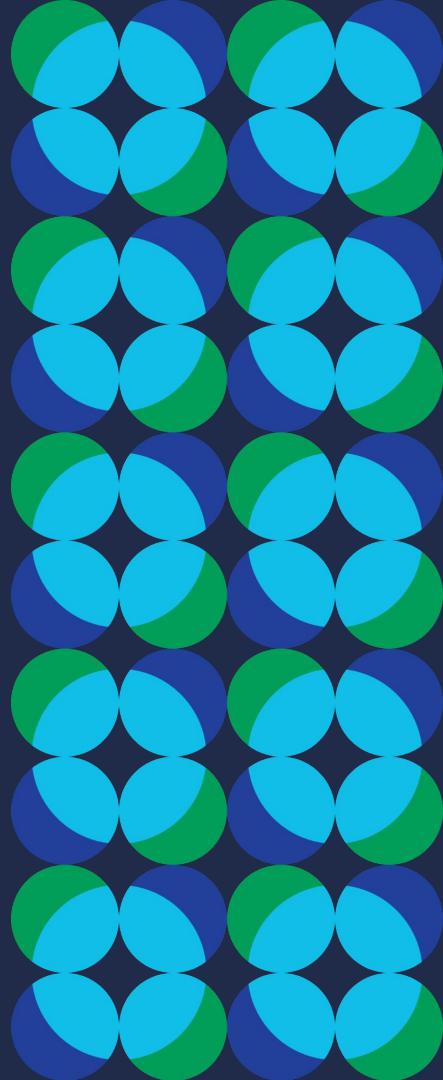
The remaining Conservative base is becoming increasingly correlated with white colour, wealthier homeowners





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The hidden divide in the Conservatives' voter pool



There is a *hidden divide* in the Conservatives' voter pool.

A key divide has emerged in the Conservative Party's potential support base. Of those who would consider voting Conservative, 45 per cent are currently voting for Labour, the Liberal Democrats or the Green Party; 53 per cent are voting or considering Reform UK or Restore Britain.

The Tory-Curious Left (current Labour, Liberal Democrat and Green voters) are affluent, likely to be graduates, and much more likely to live in London and other cities. Most support Net Zero; many would vote tactically against Reform. They most often cite **Partygate** and the **Conservatives' record on public services** as barriers. Most like Andy Burnham but dislike Nigel Farage. At its best, they believe the Conservative Party **provides economic stability**.

The Tory-Curious Right (currently Reform UK or Restore Britain voters) are more likely to feel financially insecure, to live in small towns and villages, and three quarters (75 per cent) voted for Brexit. They are strongly opposed to Net Zero, and are **worried about the Conservatives' record on immigration**. They like Nigel Farage, but dislike Andy Burnham. This group thinks that, at its best, the Conservative Party **stands for hard work and success**.

It will be challenging for the Conservative Party to please both groups. However, they do have several key things in common: both groups like Kemi Badenoch; both believe that the Conservatives have a credible economic agenda; neither group believe that the Conservatives' approach is too tough on immigration.

A tale of two voter groups

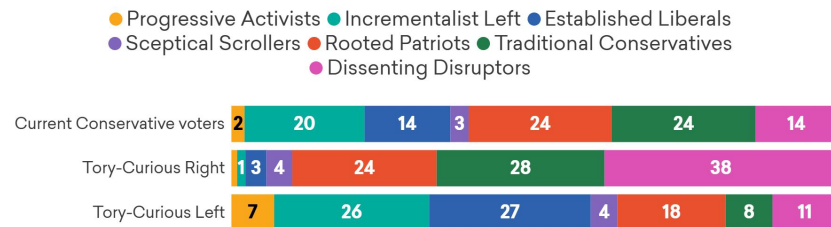
The Conservatives' potential voter pool can be split into two similarly-sized groups. Of those who would consider voting Conservative, 45 per cent are currently voting for Labour, the Liberal Democrats or the Green Party; 53 per cent are voting or considering Reform UK or Restore Britain.

These groups look very different. The **Tory-Curious Left** are three times as likely as the **Tory-Curious Right** to have a degree, and to earn over £70,000. Three quarters of the right voted Leave. The left are mostly Established Liberals and Incrementalist Left; the right, Dissenting Disruptors and Traditional Conservatives.

The Tory-Curious Left are mostly Established Liberals (27 per cent) and Incrementalist Left (26 per cent), followed by Rooted Patriots (18 per cent). **The Tory-Curious Right are dominated by Dissenting Disruptors (38 per cent), Traditional Conservatives (28 per cent) and Rooted Patriots (24 per cent).** Rooted Patriots are the only segment that makes up a large share of both groups.

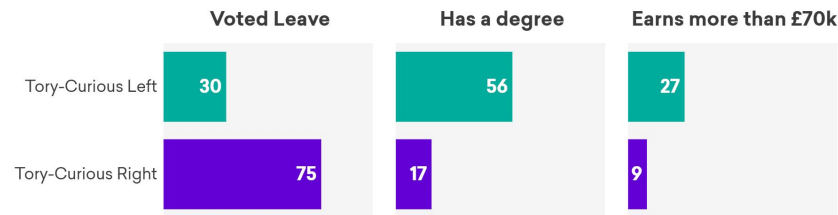
The Conservatives' two potential voter pools are drawn from very different segments

Segment make-up of those who would consider voting Conservative, and of current Conservative voters



The Tory-Curious Left are more likely to be graduates and high earners; the Tory-Curious Right voted Leave

Share of each group who voted Leave, have a degree, and earn more than £70,000



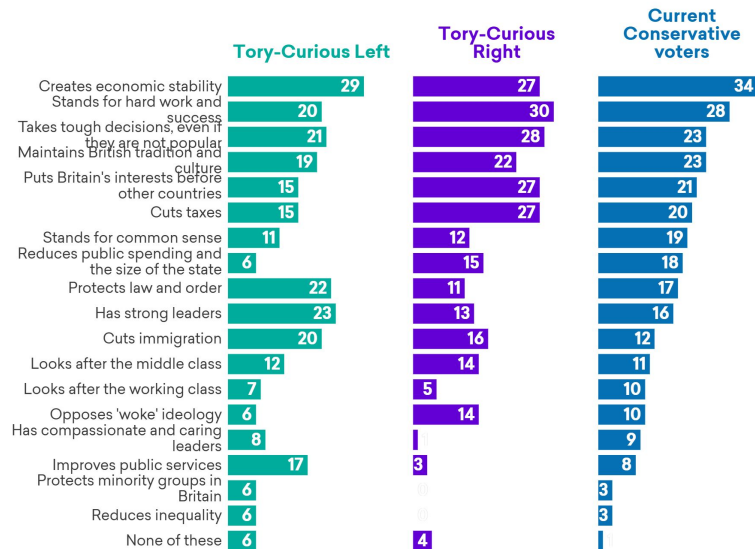
At its best, voters say the Conservative Party delivers economic stability and champions hard work

Economic stability is what current Conservative voters most associate with the party at its best.

Tory-Left voters value economic stability above all else. Meanwhile, for the Tory-Curious Right, the Conservatives at their best are also about fixing the social contract. Three in ten (30 per cent) say the party stands for hard work and success, the most popular of all answers, while 28 per cent choose the idea that the party is willing to take tough decisions, even if they are not popular. More than a quarter (27 per cent) say the Conservatives **put Britain's interests before other countries.**

Economic stability is what Conservative voters most associate with the party at its best

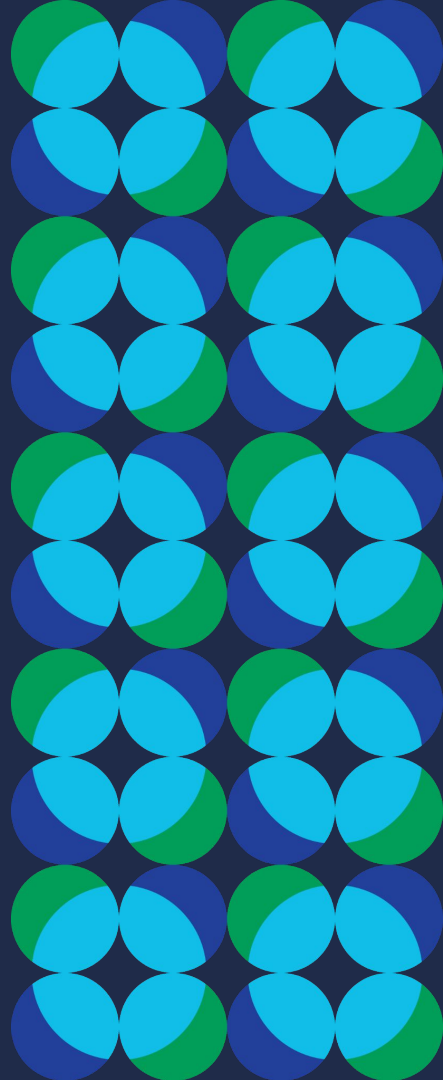
Setting aside who you intend to vote for, when the Conservative Party is at its best, what does it represent? A party that...





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What voters want from the Conservatives



Moving beyond apology

The public haven't forgiven the Conservatives for their failures in office, but they are more receptive to Kemi Badenoch looking forward than apologising for the past.

Four in ten Britons (42 per cent) say apologising for Conservative failures on immigration would reflect well on Badenoch, but more than half (52 per cent) say setting out her plans to control immigration in future would.

The shift is biggest among Conservative voters themselves: 81 per cent say moving on would reflect well, compared with 66 per cent for an apology. And among both Conservative and Reform voters, the share saying it would reflect *very well* doubles (from 27 to 54 per cent, and from 25 to 55 per cent).

Imagine Kemi Badenoch...

- **SPLIT A:** apologised for the Conservatives' failure to control immigration while they were in government. **42 per cent support.**
- **SPLIT B:** set out her plans to control immigration, including deporting people who come to the UK illegally and leaving the European Convention on Human Rights **52 per cent support.**

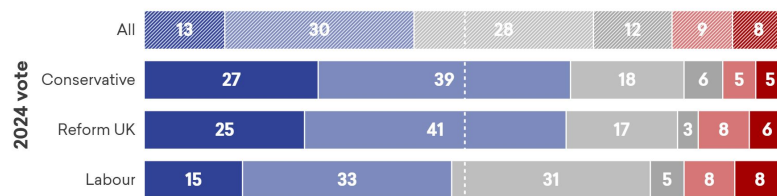
Would you say this would reflect well or badly on her?

Britons think it would reflect better on Badenoch to look forward than to apologise

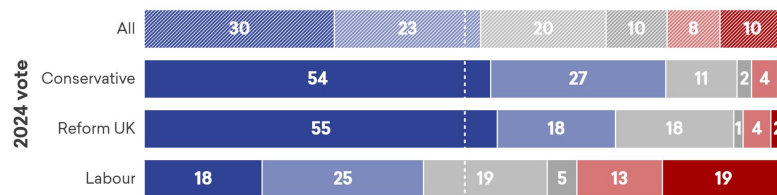
Would you say this would reflect well or badly on her?

● Very well ● Somewhat well ● Neither well nor badly ● Don't know
● Somewhat badly ● Very badly

SPLIT A: Apology



SPLIT B: Policy



Tory-curious voters have different policy preferences, but they are not irreconcilable.

The two groups diverge in their policy preferences, but there is an agenda that appeals to both.

The biggest dividing line is net zero. Three quarters of the Tory-Curious Left (76 per cent) support net zero, compared with 16 per cent of the Tory-Curious Right. The Conservatives could face pressure from their left flank to set out a clear alternative climate policy and prove they have a plan to tackle climate change.

But beyond this, many of the Conservatives' key tax and spend policies are overwhelmingly positive across their voter pool. Leaving the ECHR is highly popular with the Conservatives' right considerers, but splits the left – although notably they are still more likely to support (38 per cent) than oppose the policy.

Net Zero splits the Conservative voter base - but the vast majority of their other policies are non-divisive

Net support (support minus oppose) for each Conservative Party policy

Group ● Tory-Curious Left ● Tory-Curious Right ● Current Conservative voters



A sense that the Conservatives are too weak on immigration is a barrier with the Tory-Curious Right, but toughness is not a barrier with the Tory-Curious Left

Seven in ten of the Tory-Curious Right (71 per cent) say the Conservative Party is too weak on immigration, including three in ten (31 per cent) who say it is far too weak.

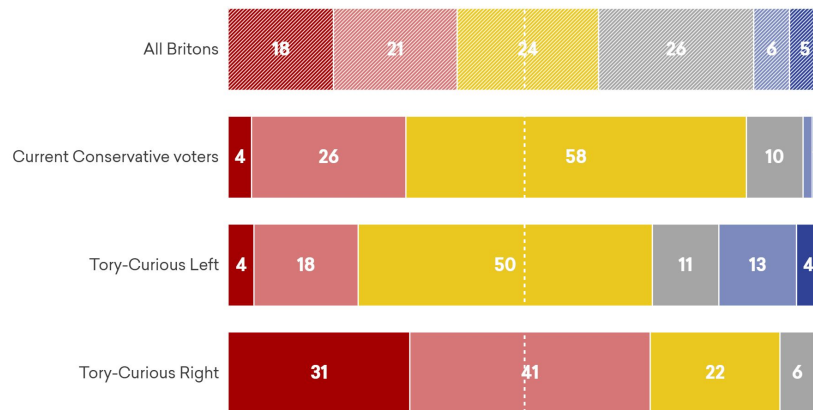
But it would be a mistake to assume that demonstrating toughness on immigration is a barrier with the party's left flank. Only 17 per cent of the Tory-Curious Left say the Conservatives are too tough on immigration. Half (50 per cent) say the party's approach is about right, and 22 per cent say it is too weak.

In other words, demonstrating credibility on migration may still be needed.

Few Britons believe the Conservatives' approach to immigration is too tough

From what you've seen and read, would you say the Conservatives' proposed immigration policies are,,

● Far too weak ● A bit too weak ● About right ● Don't know ● A bit too tough ● Far too tough



Most Britons support the Conservatives in cutting benefits for foreign nationals – but including EU citizens could prove to be more divisive

Nearly three in five Britons (59 per cent) support the principle of stripping benefits from foreign nationals.

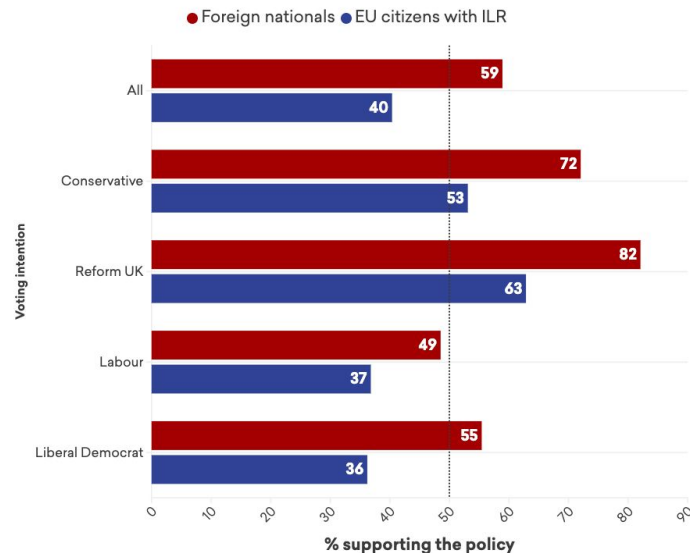
When asked specifically about EU nationals, this falls to 40 per cent overall and just above 6 in 10 Reform voters (63 per cent). In focus groups, participants often cite principles of fairness as well as personal familiarity, with many who might lose out.

 *We've got a friend, she's Italian and she's lived here for years and years, and I don't think she has got British citizenship.... And she's put into this system for 10 plus years, so if anything happened to her and she got poorly today, why shouldn't she be entitled to it?*

Dorothy, Small Business Owner, Erewash

Britons support the principle of cutting benefits for foreign nationals, but not when it comes to EU citizens with ILR

Support for making [foreign nationals/ EU citizens with ILR] ineligible to claim benefits in the UK.



The median Briton places themselves between the Conservatives and Reform on immigration

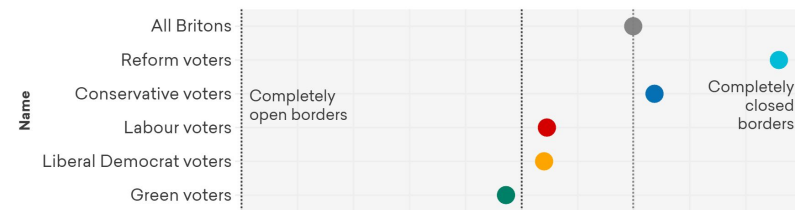
The average Briton describes themselves as slightly further right than the Conservatives on migration. There is appetite to go further, but to try to outflank Reform risks missing the median voter.

On a scale from 0 (completely open borders) to 10 (completely closed borders), the median Briton places themselves at 7. They place the Conservatives at 6, Labour, the Liberal Democrats and the Greens at 5, and Reform UK and Restore Britain at 9. In other words, Britons place themselves to the right of the Conservatives, but to the left of Reform and Restore. **Conservative voters place themselves in line with the median Briton.**

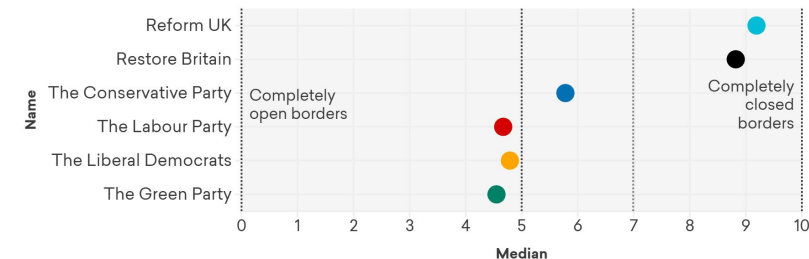
Britons place themselves to the right of every party on immigration - except Reform UK and Restore Britain

How would you rate yourself and the following parties regarding their approach to immigration to the UK?

How voters describe themselves:



How the median Briton describes each party:



The Conservatives could make economic credibility a USP

Conservatives have begun to claw back ground on the economy from other parties, after a year of heavy focus in their messaging.

The Conservatives are the only party seen by the public as more realistic than unrealistic in their economic plans. The Conservatives are also more trusted on handling debt, foreign investment and lower taxation than Labour.

“Creates economic stability” is now the top description that voters cite when they are asked to name the Conservatives’ biggest strength, with around 17% mentioning this.

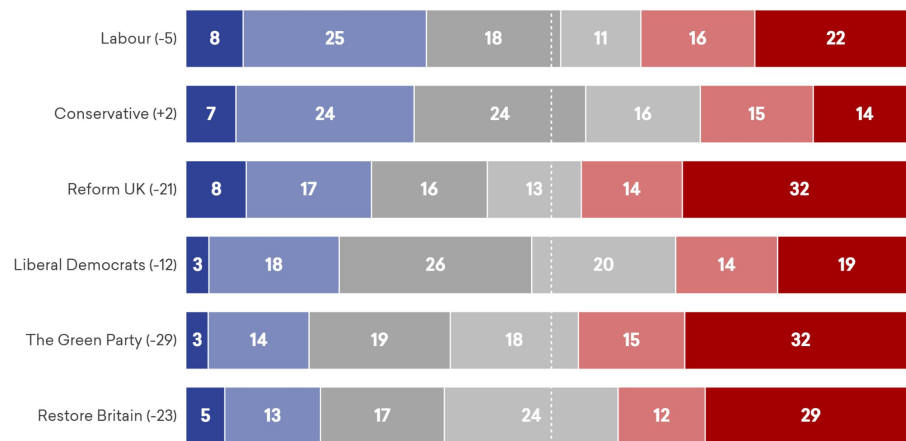
 *It's a real opportunity now for Kemi and for the Conservatives to take that centre right (...) They are missing an opportunity to gain back people that are probably a little bit more business-minded and a little bit right-leaning, but certainly wouldn't vote for Reform.*

Pete, adult education, Lincolnshire

The only party seen as more realistic than unrealistic in their economic plans are the Conservatives

For each of these parties, would you say their plans for the economy are realistic, or not realistic?

● Very realistic ● Somewhat realistic ● Neither realistic nor unrealistic ● Don't know
 ● Somewhat unrealistic ● Very unrealistic



But memories of the past government is still dogging the Conservatives on the economy

There are still crucial vulnerabilities on the Conservative economic record, however.

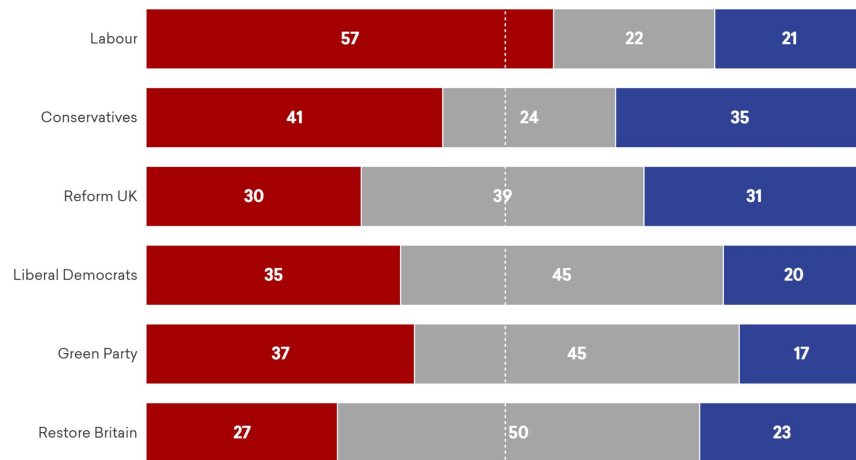
Despite a raft of promised tax cuts, the public are not convinced that the Conservatives are the party of low taxes. They poll far better than Labour on this metric, but 41 per cent still associate the Conservative with high taxes, compared to 35 per cent who associate them with low tax

There is also scepticism about who the Conservatives tax policy will benefit. 24 per cent think the Conservatives will benefit 'people like me', compared to 43 per cent who do not. 35 per cent think their economic policies mainly benefit the upper classes, compared to 22 percent who think they mainly benefit the middle classes.

The Conservatives are still more associated with high taxes than low taxes

Would you associate the following parties with...

● High taxes ● Don't know ● Low taxes



The Conservatives can unite disparate voter groups on the economy

Although the potential Tory voter coalition may diverge on net zero and the priority given to immigration, the way to unite different segments of the Conservative base is through the economy, where voters broadly agree.

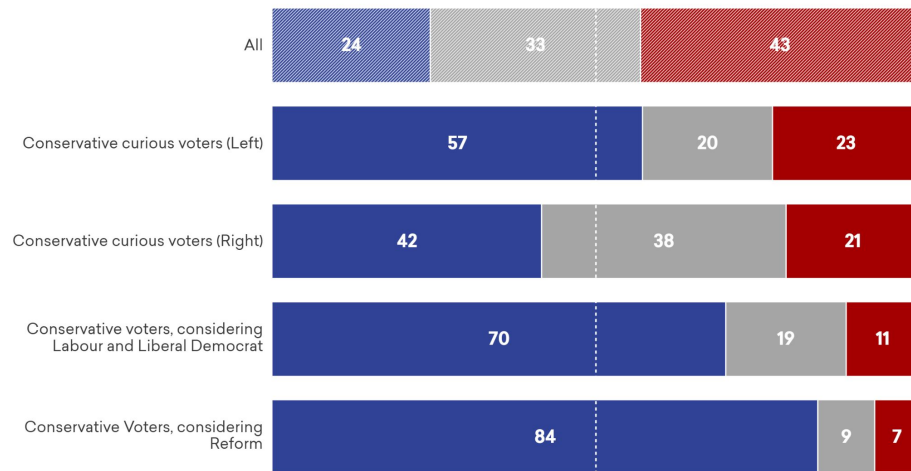
Where they do agree is on a sense that the Conservatives could make people like them better off. Tory curious, and current Conservative voters currently agree that Conservatives will make life better for people like them.

Focusing the national conversation on economic issues where there is broad agreement among the Conservative potential base, and off more divisive areas, will help unite this coalition.

The Conservative coalition is united by an expectation that Conservative economic policy helps them

From what you've seen and read, would you say the Conservative Party's economic plans...

● Would benefit people like me ● Don't know ● Would not benefit people like me



The public are open to a tough conversation about public spending

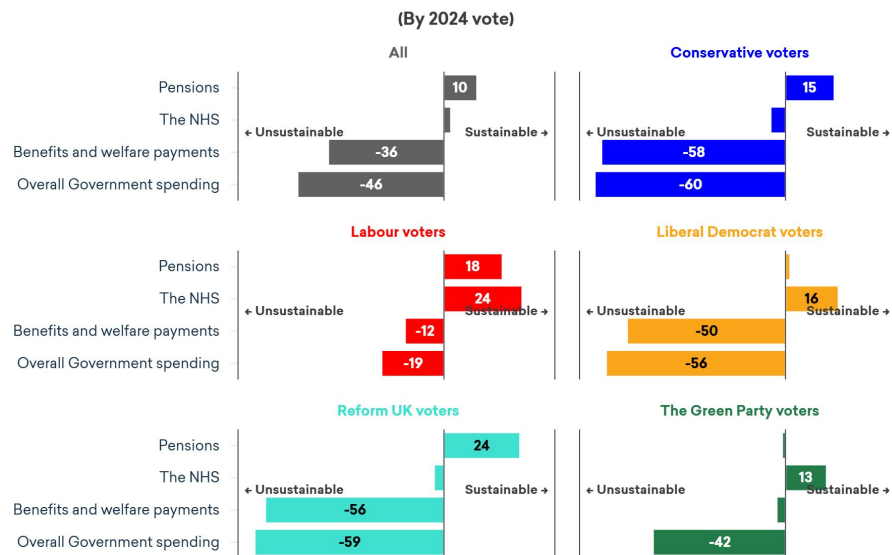
Nearly two thirds of Britons (64%) think the current level of overall government spending is unsustainable; only 18% think it's sustainable.

Welfare is where the public is most convinced that current levels need to change. Six in ten (60%) say spending on benefits and welfare is unsustainable. That includes three quarters of 2024 Conservative and Reform UK voters, and even around half (51%) of Labour's own 2024 voters.

The NHS and pensions split voters. The public is split on whether NHS spending is sustainable (41% sustainable, 40% unsustainable), and more say pensions spending is sustainable than not (44% to 34%).

Most Britons - and including 2024 Labour voters - think current welfare spending is unsustainable

Would you say that levels of Government spending on each of the following at the moment are sustainable or unsustainable?



There is space for Kemi Badenoch to be a national unifier

Often, Britons in focus groups respond well when **Kemi Badenoch talks about culture and national identity**. Her interventions on integration are often popular, and set her apart from Labour – but often her supporters praise her for having mainstream boundaries than Nigel Farage is seen to go beyond.

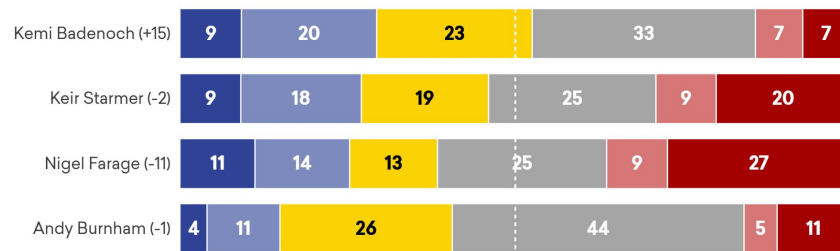
A key example is Badenoch's response to the Henry Nowak case: Britons rated her response more than Keir Starmer's and Nigel Farage's. Some felt that Keir Starmer's response failed to acknowledge a real problem, while Farage's "pure cold rage" statement was seen as divisive.

In this context, there may be space for Kemi Badenoch to be seen as a national unifier – setting her apart from both Labour and Reform UK.

Badenoch's response to the Nowak case has landed best with the public

For each of the following, how well or badly do you think they have responded to the Henry Nowak case?

● Very well ● Quite well ● Neither well nor badly ● Don't know ● Quite badly ● Very badly



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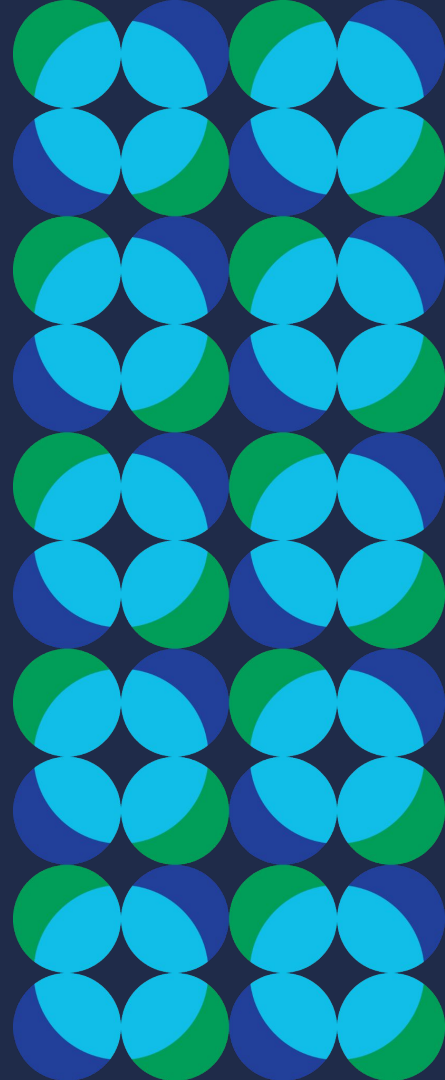
"I think she's good. I think that some of the things that she said about British culture and that we shouldn't be so tolerant of other people's cultures, and there's a level of tolerance, and I think that we are too tolerant of other people and we need to have a bit more pride, a bit more standards, and we should be proud of our country. And I think that she does say that, but then it's like the journalists are trying to trick her into saying something to make a sensation out of it."

Kevin, broker development manager, Nuneaton



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Paths to 2029



The Battle for the right is on a knife edge

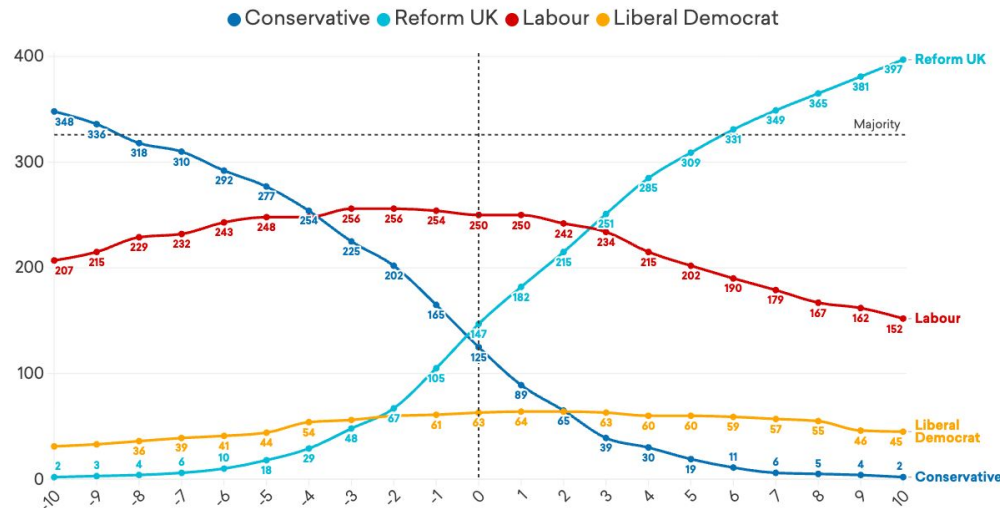
Conservatives are highly vulnerable to any Reform UK revival, and, on the other hand, could greatly benefit from Reform voters coming back to the party

Fewer than 1 in 100 Reform voters need to change their mind and support the Conservatives for the Conservatives to remain as official Opposition. A 2% swing away from Reform will deliver the Conservatives over 200 seats.

If Reform revives, however, the Conservatives fall under 100 seats with just a 0.6% swing to Reform, and drop under 50 with a 2.6% swing to Reform.

The battle for the right is on a knife's edge, with small swings either way radically changing the political landscape

Seats under uniform swing between Conservative and Reform UK, applied to September MRP baseline



Conservatives could profit from persuading Liberal Democrats

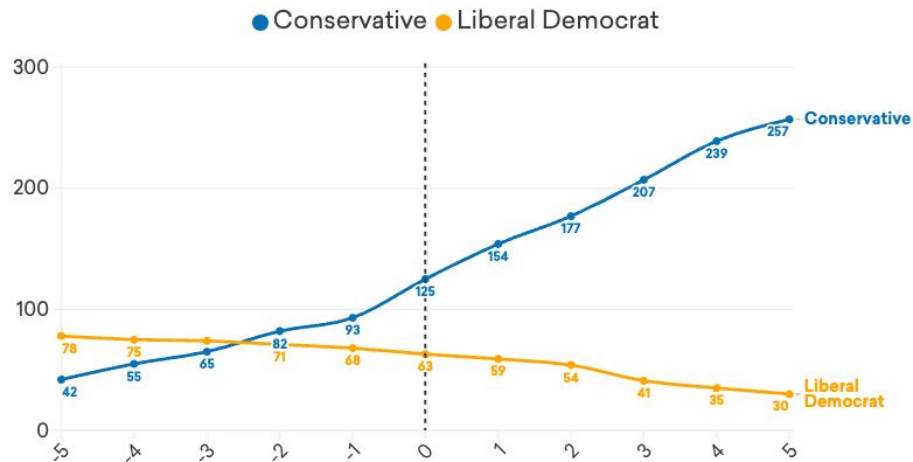
At the moment, 24 per cent of Liberal Democrats are open to considering voting Conservative.

A swing from the Liberal Democrats to Conservatives could not only help win back Con-LD seats, but would win back other seats where Liberal Democrats are likely splitting the centre-right vote. A 1% swing takes the Conservatives to 154 seats, larger than Reform, and a 3% swing reduces the Liberal Democrats to 41 seats and pushes the Conservatives above 200.

Conversely, the Conservatives are still vulnerable to losing voters to the Liberal Democrats. Just a 2.8% swing from Conservative to Liberal Democrat would leave the Liberal Democrats larger than the Conservatives.

Conservatives could profit from squeezing persuadable Liberal Democrats

Seats under uniform swing between Liberal Democrats and Conservatives, applied to September MRP baseline

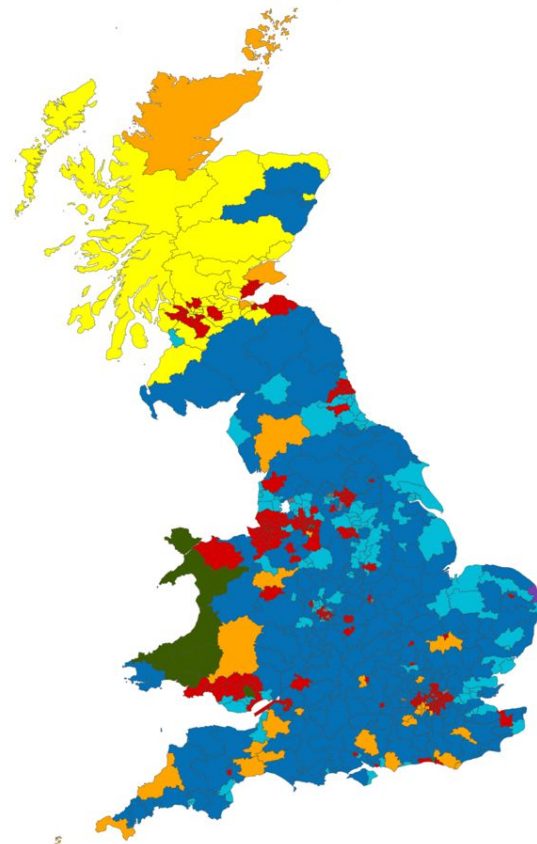


A Centrist Path to Victory?

One way the Conservatives could establish a poll lead is by squeezing the 'tory curious' voters currently voting Labour, Liberal Democrat or Green.

If 50% of those voters would switch over, Conservatives would lead Reform and Labour, 27% to 24%. This would establish the Conservatives as the largest party, with 259 seats, with Labour at 177, Reform at 110 and the Liberal Democrats at 31.

This coalition would retake much of the home counties, south west and south east from Labour and the Liberal Democrats, but struggle in 'the red wall'. The Conservatives could win up to 19 seats in London.

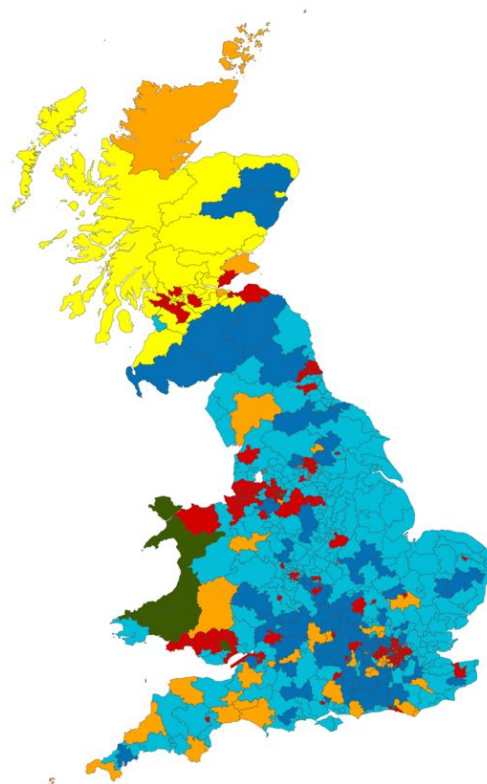


... but losing voters to Reform could spell disaster

However, losing half of the 28% of Conservatives who would consider voting Reform if the Conservatives adopt a centrist strategy, could spell disaster.

Reform would rise to 280 seats, and the Conservatives would crash to 89 seats. Labour would win 169 and the Liberal Democrats 40. It would see the Conservatives wiped out in the South West and East.

Interestingly, the national popular vote under this scenario is closer than the seat result appears. This scenario sees Reform winning 27% of the vote, Labour 24%, and the Conservatives 23%. The fact that Reform would win over three times more seats, despite the gap with the Conservatives being just 4 points, suggests that a centrist strategy that loses Reform voters may be particularly electorally inefficient.



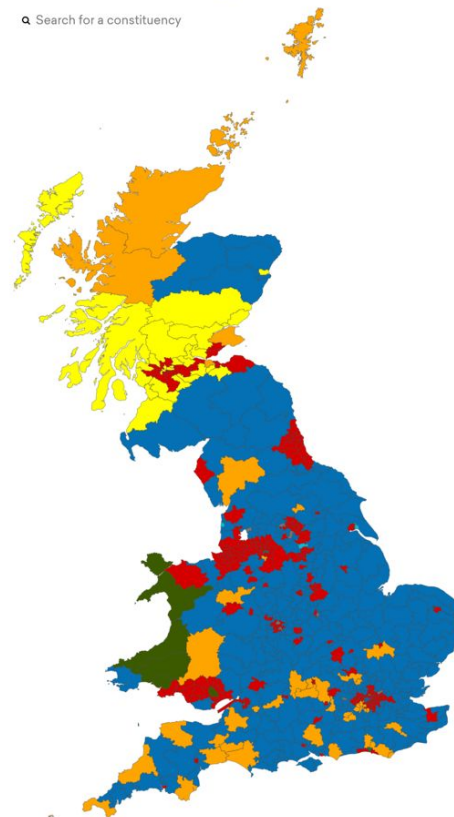
Conservatives winning back the right could reap electoral rewards

One way the Conservatives could establish a poll lead is by squeezing the 'Tory curious' voters currently voting Reform or Restore Britain.

If 50% of those voters would switch over, Conservatives would lead Labour and Reform, 28% to 26% to 18%. This would establish the Conservatives as the largest party by a wide margin, with 302 seats, Labour on 238, Liberal Democrats at 44, and Reform collapsing to just 3.

This coalition would be built overwhelmingly outside London: the party's gains are concentrated in the South East (63 seats), East of England (51), West Midlands (37) and South West (37), and the East Midlands (33) with smaller gains even reaching into Yorkshire and the Humber (25) and the North West (17).

 Search for a constituency

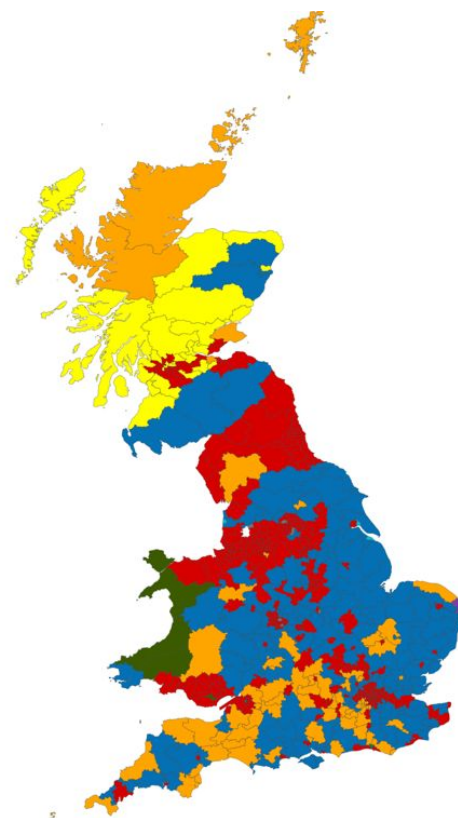


But they cannot afford to sacrifice the centre

However, losing half of the Conservative voters who would consider voting Labour (21%) or the Liberal Democrats (24%) by adopting a strategy focusing on the right, could also put off left leaning voters and also lead to a severe defeat.

Labour's tally would rise to 340 seats, and the Conservatives would fall to 177 seats. Reform would remain wiped out at just 3, and the Liberal Democrats would rise to 71. It would see the Conservative coalition shrink hardest in London (down to just 10 seats) and the North East (down to 1), while holding up comparatively better in the East of England (38) and South East (34).

This underscores the danger of adopting a purely right or left leaning strategy. Losing either of the left or right flanks would both end in disaster. **Conservatives must balance the need to please the centre, and win back the right.**





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Can Badenoch turn the Conservatives around?



Monday 5 October



16:15 to 18:00



Sonata Room, Hyatt
Regency, Secure Zone



Lord Finkelstein
(Chair)
The Times



Nick Timothy MP
Shadow Justice
Secretary



Kevin Hollinrake MP
Chairman of the
Conservative Party



Baroness Davidson
Prosper UK, and
former Leader of the
Scottish
Conservatives



Alex Burghart MP
Deputy Leader of
the Conservative
Party



Chris Philp MP
Shadow Home
Secretary



Victoria Atkins MP
Shadow
Environment
Secretary



Luke Tryl
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Coming up later today...



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Policy Lab

Strong community and prosperous economy: can a Conservative communitarianism renew Britain?



Megan
McElroy (Chair)
Politico



Lord
Willetts
Resolution
Foundation



Kitty
Thompson
Create Streets
Foundation



Joe Robertson
MP
Shadow Minister for
Work and Pensions



Luke
Tryl
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Mayor Paul
Bristow
Mayor of
Cambridgeshire and
Peterborough



Monday 5 October



18:15 to 19:15



Executive Room 7,
Secure Zone, ICC

More in Common Conservative Conference Reception

20:30 onwards

Executive Room 7, Secure Zone, ICC



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