The New Majority

The state and future of the British centre-right

BY JAMES FRAYNE

About the Author

James Frayne is a founding partner of policy research agency Public First, launched in 2016. James is a leading conservative strategist and has been influential in the Conservative Party's pivot towards working-class voters. He has been writing about working-class politics for many years, most notably for ConservativeHome and The Sunday Telegraph. He was Director of Communications for the Department for Education between 2011 and 2012, when Michael Gove was pushing the mass expansion of academies and the introduction of free schools. With thanks to Ed Shackle and Seb Wride for their help on this research

The Centre for Policy Studies

The Centre for Policy Studies is one of the oldest and most influential think tanks in Westminster. With a focus on taxation, economic growth, business, welfare, housing and the environment, its mission is to develop policies that widen enterprise, ownership and opportunity.

As an independent non-profit think tank, the CPS's work is supported by like-minded individuals and companies, but it retains full editorial control of all output to ensure that it is rigorous, accurate and unbiased.

Public First

Public First is an opinion research and policy development agency. It specialises in the analysis of complex public policy. Founded in 2016 and led by a group of senior policy experts primarily from the worlds of government and think tanks, Public First has worked for national and local governments, for some of the world's biggest businesses, as well as for an array of think tanks, campaigns and non-profits, in more than two dozen international markets.

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Executive Summary

Over the last few years, the centre-right coalition in the UK has broadened beyond recognition – illustrated most strikingly by the Conservative Party's landslide win at the 2019 election. It is vastly more financially and socially diverse than it was a decade ago; it's also geographically much broader.

The challenge, both for the Conservative Party and for the broader centre-right, is to maintain this new majority – in extraordinarily challenging political and economic times.

This report, informed by comprehensive new opinion research by Public First for the Centre for Policy Studies, examines the values and attitudes that bind this coalition together, and split it apart. It argues that the conservative movement's future lies in paying disproportionate attention to less affluent, working-class voters – voters even less well-off than the lower-middle-class who have sustained the Conservatives' electoral performance for two decades.

> **'The challenge, both for the Conservative Party and for the broader centre-right, is to maintain this new majority – in extraordinarily challenging political and economic times'**

Not only are these poorer voters the ones who are peeling off in the largest numbers right now, but the attention required to maintain their support will not irritate or alienate the other parts of the coalition. In fact, most of the policy ideas flowing from this strategy attract the support of the centre-right coalition as a whole.

Of course, the centre-right movement and the Conservative Party aren't the same thing. However, for the ease of analysis, they're occasionally used interchangeably in this paper. The Conservative Party is after all the primary vehicle for the political progress of centre-right ideas – and its electoral fortunes are the easiest way to measure their resonance.

The new working-class voters

In the past, I have written extensively about the lower middle class and affluent working class – the 'Just About Managing'. I spent several years arguing these voters should be the conservative movement's primary targets. These are the sorts of voters who are in steady, skilled, full-time work – for example in car factories and admin jobs in our smaller cities.

Post-Brexit, however, the centre-right movement became more authentically working-class, as it attracted less-affluent working-class voters in large numbers. Many came over to the Tories because of concerns about immigration and Brexit; others were

worried about the prospect of a high-taxing, high-spending Labour Party. As this paper explores, a sense of patriotism – at a time when Jeremy Corbyn seemed actively unpatriotic – also mattered.

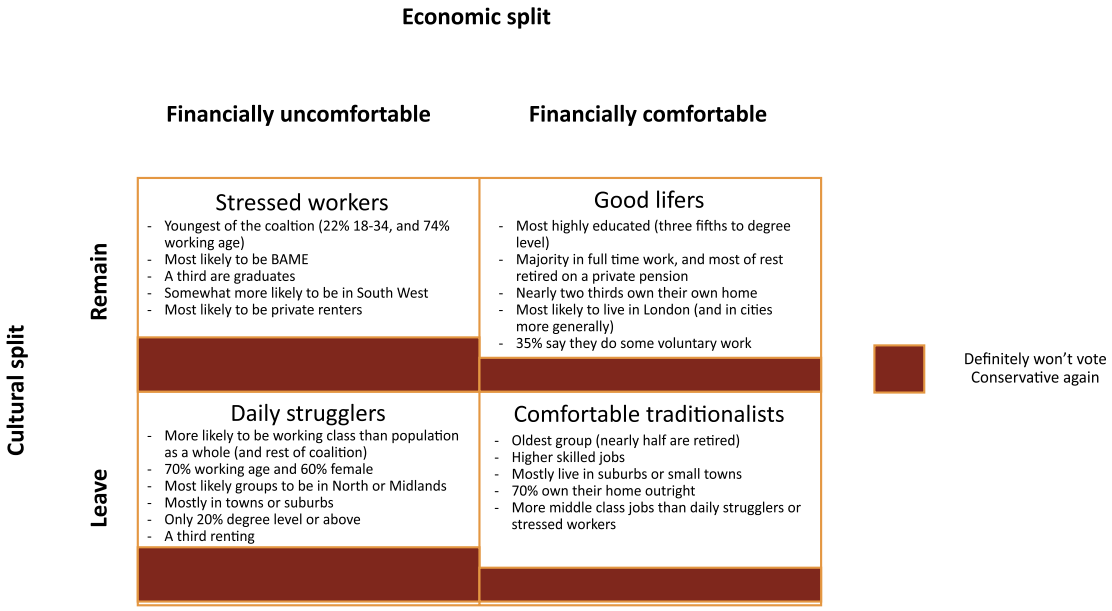
These less affluent voters work hard, but they're more likely to be in precarious roles in hospitality and retail. They're in towns and cities of all kinds across the country, but they're more urban than their more affluent working-class and lower middle-class neighbours. In short, they require a different approach from the 'Just About Managings'. And, from an electoral point of view, they are also those who the party has the loosest hold on. The affluent working class and lower middle class are unlikely to go anywhere too quickly; most 'Just About Managings' are still a long way from considering a Labour vote. It is further down the social scale that the new electoral battleground is to be found.

The centre-right coalition

In this report, we suggest there are essentially four key blocks who make up the coalition that voted Conservative in 2019:

- Working-class Leave voters, who we call daily strugglers (around 35% of the Tory coalition);
- Working-class Remain voters, who we call stressed workers (around 10% of the coalition);
- Affluent, mostly middle-class Leave voters, who we call comfortable traditionalists (around 35% of the coalition);
- Affluent, middle-class Remain voters, who we call good lifers (around 20% of the coalition).

They are summarised in the chart below.



There are vast numbers of other alternatives that could be considered – and indeed an array of other blocks we could break the coalition into. But the most obvious and useful approach, supported by the data, was to look at the most significant drivers of opinion and behaviour between different 2019 Tory voters; these were wealth and Brexit vote. Doing this gave us four groups with coherent values and opinions, which we can talk about generally but with sufficient specificity to guide politicians' thinking.

'Our analysis shows – as do the polls more broadly – that the Conservatives have lost ground with voters of every type since the 2019 election'

Our analysis shows – as do the polls more broadly – that the Conservatives have lost ground with voters of every type since the 2019 election. Many say they will not vote for the Tories at the next election. However, it is among the two less affluent groups where the party is seriously wobbling. These working-class voters make up over 40% of the Conservative vote, and many now say they don't know who they'd vote for next time: 25% of our daily strugglers say they will definitely not vote for the Conservatives next time around, while 26% of stressed workers say the same. This compares to 16% of comfortable traditionalists and 14% of good lifers. A small percentage have made up their minds to vote Labour (a smaller number Lib Dem), but most of those wobbling are just unsure where to go.

The centre-right strategy: 'on your side'

Given that these working-class voters are the most likely to be wobbling, the Conservative Party needs to pay them special attention. The strategy for the centre-right should therefore be built on three words it must credibly be able to say to working-class voters: 'on your side'. These words should determine what the Government does and how the centre-right conceives of and describes political action.

The reason for these words' stark nature reflects the anger felt within working-class communities; they currently don't think anyone is on their side and they feel forgotten. The Government and others need to be explicit arguing and showing them that this isn't the case.

Above all, working-class voters are drifting away from the centre-right movement because they're seething with anger at a perceived Conservative failure to deal with the cost of living crisis.

A few months ago, all voters were prepared to contextualise the dramatic increase in the cost of living as being down to the fallout of the Russian invasion of Ukraine and the massive debts accumulated by furlough payments during the Covid crisis. This has changed dramatically. Now, they increasingly blame the party they put their confidence in just a few years ago. They think the Conservatives are sitting idly by as their lives collapse around them. As a result, many don't currently believe the Government is on their side at all.

This anger has been brewing for a while but has been exacerbated by the leadership election. Not only did it seem to go on forever, but little of the candidates' campaigning seemed relevant to working-class lives. Particularly in the early rounds, candidates dwelt on apparent irrelevances such as free speech and gender identity; latterly, there has been a sense that the concrete measures the candidates have put forward to help alleviate rising costs have seemed laughably small in scale. To them, no one seems to be taking the problem seriously enough.

‘On your side’: helping them through the crisis

While this paper is designed to present a longer-term strategy for the centre-right, in our view that strategy must be rooted in a response to the present crisis. This is for two reasons: first, because it’s likely economic turmoil will be with us for many years, and second, because competence and compassion today will breed trust tomorrow.

To think of this the other way around: poorer voters will never forgive the Conservatives if they leave them high and dry without sufficient help when they really need it. In many ways, the stakes are even higher than during the Covid crisis.

> **‘Obviously, the next Government will announce specific measures to help on cost of living in the coming weeks’**

The Conservative response to the cost of living crisis should therefore act as the pivot point to set up the next phase of Conservative government and the centre-right movement’s campaigning. Because, as argued above, the party’s longer-term future lies in keeping working-class voters embedded within it.

Obviously, the next Government will announce specific measures to help on cost of living in the coming weeks. There has been much debate over the necessary scale of these, and whether it is best to target assistance or help all voters regardless of their financial circumstances (as proposed by Keir Starmer and Labour).

Our findings suggest that, whatever the economic arguments, poorer working-class voters will be most grateful for, and keenest on, measures that disproportionately benefit them – in other words, they believe they should receive the most help, and should receive it before others (and particularly before big business).

‘On your side’: patriotism and fairness

The two most powerful values for the centre-right right to project for working-class voters – to show they’re ‘on your side’ – are patriotism and fairness. Patriotism is the glue that has bound the centre-right coalition together in recent years, not least in the face of perceived attacks on Britishness by Jeremy Corbyn. While Starmer is a very different politician to Corbyn, the centre-right coalition reasonably considers British patriotism to be under threat from the left.

Patriotism should remain a key centre-right value. This should certainly not be an aggressive patriotism – and emphatically not an exclusive one – but a quiet and inclusive patriotism that the provincial English particularly tend to share. David Cameron probably articulated this best in recent times; to him, it just felt entirely natural and entirely moderate – a classic English, low-key patriotism.

Patriotism is not primarily a cultural force. That said, it is the only aspect of the culture war that has any resonance with most voters, including most Conservative voters. Many commentators wrongly assume the English working-class is obsessed and angry about ‘wokery’ and demand the Conservative Party do something about it. In truth, for the most part, working-class voters couldn’t care less about it. They know little about issues like gender identity, free speech, and so on. They do care, however, about attacks on Britishness and British history.

Yes, they fully acknowledge that Britain has something of a complex past, and that crimes have been committed under the British flag. However, they firmly believe that on balance we should be proud of our collective history and proud of the country we now are.

Even more important than patriotism is fairness – a particular obsession of the English working class. It is a value that must run through the movement's policy design and commentary on the cost of living crisis, and its proposed reforms of the economy and wider capitalist system.

'A focus on fairness will help the centre-right project an additional value, if you can call it that, of anti-establishment politics'

Working-class voters have long felt the system works against them. Usually, this isn't about 'the rich' having an easy life. Often their sense of unfairness reflects a sense that politicians haven't done enough to make work pay – and that a significant number of people do no work when they could, and get rewarded for it.

A focus on fairness will help the centre-right project an additional value, if you can call it that, of anti-establishment politics. It's hard not to fall into cliches when describing this approach (being on the side of 'the little guy'; backing 'the underdog' and so on); however, it's one of those things that people know when they see it and respond strongly to.

'On your side': an economic policy for working-class voters

Practically speaking, how does the movement show working-class voters it's 'on your side'? With the cost of living crisis in mind, we need to look at the economy first.

As I note above, if the Government decides that tax cuts are their chosen route to alleviate the cost of living crisis (this is not a cost of living policy report and is not analysing that choice against subsidies) they must show they know who is hurting most. That suggests that tax cuts should primarily be targeted at poorer voters – not for the population as a whole. These voters also believe that small businesses and sole traders need more immediate help than bigger businesses.

They would also support a massive crackdown on Government waste. Rightly or wrongly, working-class voters believe the Government could cut a great deal and that this would make a big difference to the public finances.

But beyond the specifics of the cost of living crisis, there is a broader economic policy that would appeal to working-class voters – as well as the other groups that make up the centre-right coalition – which would align these values of fairness and anti-establishment politics. This is fundamentally a reboot of its approach to free-market capitalism.

As the Centre for Policy Studies has repeatedly argued, restoring economic growth should be the country's core policy priority. That means supporting business. For example, the think tank has argued eloquently against the proposed rise on corporation tax, and spelt out the economic costs that it would have.

But in the eyes of working-class voters, from our research, the centre-right movement in general and the Conservative Party in particular has too often aligned itself with corporatist 'rent-seeking' – allowing the same sclerotic big businesses to operate as they always have at the expense of ordinary workers and consumers. They endlessly

see senior management in major companies pay each other vast fortunes even as their businesses go to the wall, or award ludicrous dividends to directors and shareholders, or raid pension funds and savings accounts to secure their own personal finances. This has delivered a bad deal for working-class voters, and it explains why so many have a negative view of 'big business'.

'As the Centre for Policy Studies has repeatedly argued, restoring economic growth should be the country's core policy priority'

To show 'it's 'on your side', the movement needs to accompany its pro-growth agenda with genuine free-market reforms that deliver for ordinary people. This doesn't mean just lazily advocating the taxation of big businesses and the wealthy for no reason. Rather, it means shaking up the market such that consumers get more rights and better products; breaking up the effective monopolies too many businesses have within their sectors; boosting small business challengers; and so on. The Conservatives should apply themselves to genuine free market reforms.

'On your side': levelling up

The final big policy area to focus on at the outset is levelling up. Time is running out to show the Government can deliver on this policy at all; they need to make significant progress by the next election. In doing so, they need to listen to working-class voters and focus on what matters most to them. And above all, that is about improving high streets and smashing anti-social behaviour in town centres and housing estates – about making working-class communities fundamentally more 'liveable'.

Our research shows that levelling up shouldn't be seen as a 'nice to have', or a luxury that sadly can't be paid for now the cost of living crisis has taken hold and money has run out. The decline of many working-class towns is part of the wider story of economic frustration; it feels to many as if their entire lives are going to the dogs, as they struggle personally even as their communities crumble around them. This can't be emphasised too highly: if people are struggling terribly to pay their bills and their homes are decaying, walking out of their front doors and seeing their communities decaying too makes it look and feel like they're under siege.

Methodology

The opinion research for this report, carried out by Public First, took place over the spring and summer of 2022 – beginning during the last period of Boris Johnson's tenure and concluding midway through the Conservative leadership contest. We ran a mixture of qualitative research in the form of focus groups, and quantitative research in the form of polling. We ensured we held a number of focus groups after Boris Johnson's resignation and during the leadership debate to prevent the groups being too focused on passing issues.

We held 10 focus groups between April and August 2022, made up of the following sessions:

- **Greater Manchester**, August 23, working-class, Remain-voting Conservatives, open to voting for another party
- **Bury**, July 13, working-class, Leave-voting Conservatives, open to voting for Labour

- **Wolverhampton**, April 20, working-class, Leave-voting Conservatives, open to voting for another party
- **Derby**, April 20: working-class, Leave-voting Conservatives, open to voting for another party
- **Bury**, April 12: working-class, Leave-voting Conservatives, open to voting for another party
- **Barnsley**, April 12: working-class, Leave-voting Conservatives, open to voting for another party
- **Broxtowe**, April 21: middle-class, mix of Leave and Remain-voting Conservatives, open to voting for another party
- **Pudsey**, April 19: middle-class, mix of Leave and Remain-voting Conservatives, open to voting for either Labour or Lib Dems
- **Uxbridge**, April 12: middle-class, mix of Leave and Remain-voting Conservatives, open to voting for either Labour or Lib Dems
- **Esher**, April 12: middle-class, mix of Leave and Remain-voting Conservatives, open to voting for Labour and the Lib Dems

Public First also ran a 4,000 sample nationally representative poll between the 11th and 14th of July 2022. The respondents were weighted to be representative of the GB population by interlocking age and gender, region and social grade.

Public First is a member of the British Polling Council and Company Partners of the Market Research Society, the organisations which set the professional standards for opinion research firms in the UK.

Chapter One: The 2019 Coalition, Then and Now

This paper is about the centre-right movement and its future. It sets out a strategy for the movement to maintain the New Majority that it has developed over the last decade. However, for the purposes of this analysis we have focused on the Conservative Party. This is the primary driver of centre-right progress; and the fact it fights elections with measurable outcomes means it's by far the easiest way of evaluating the appeal and strength of centre-right ideas.

The different groups within the coalition

We can only create a strategy to develop and maintain The New Majority if we understand what it looked like in December 2019 – when the Conservatives secured their 80-seat majority – and what it looks like now. In particular, we need to understand which voters have begun to peel off from the Conservatives and why.

It is of course possible to break any electoral coalition into a vast array of voter segments. Indeed, the election campaigns for 2024 will no doubt do this as they seek to micro-target ads to different groups via social media. But this document isn't intended to be a playbook for the next campaign. It is meant to set out the basics of policy design and overall positioning, in order to retain and ideally embed this New Majority.

With this in mind, I'm breaking the Conservative coalition from 2019 into four significant groups. These are created by taking the issues and characteristics that most define their views. In this case, it means splitting the 2019 Conservative voter coalition into Leave and Remain, and then further splitting those groups between those who are relatively or very comfortable financially, and those who are struggling to make ends meet or can afford the essentials but do not have money for luxuries.

Doing so produces not just a coherent set of groups, but groups with significant differences between one another – while being broadly and noticeably Conservative.

We look at these in greater detail in subsequent chapters but, briefly, the groups are the following:

1. **Daily strugglers (Leave voting, financially uncomfortable)**. Making up a third of the Tory coalition, these are less affluent working-class voters whose lives are becoming more and more difficult as the cost of living rises. While they voted Leave – with many having previously voted UKIP – their lives are dominated by daily struggle. A significant minority are out of work and live in social housing, and around a third are retired.

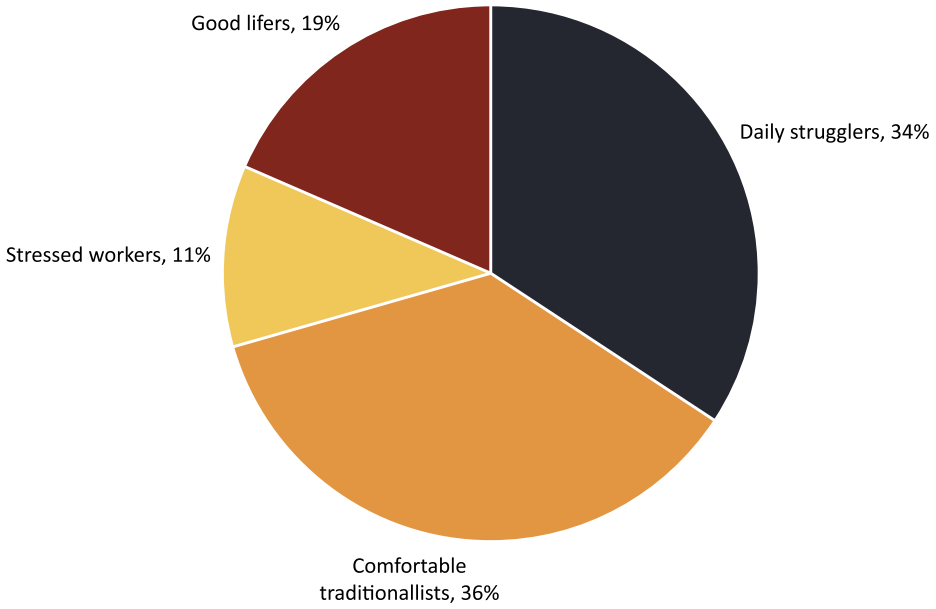
2. **Stressed workers (Remain voting, financially uncomfortable)**. At just over 10% of the coalition, they are the smallest part of the Tory vote. They lean middle-class, but aren't mostly graduates. Few own their own homes and many rent. Conservative supporters from ethnic minorities are more likely to be found in this group than other groups (around 10% of this group is from an ethnic minority). They are Remain voters. As with

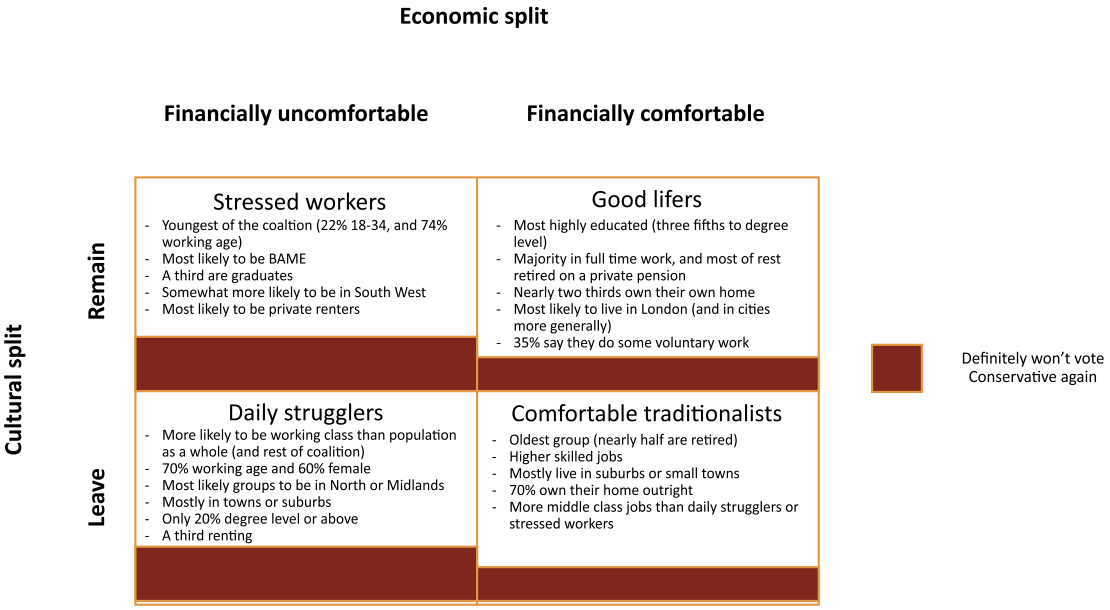
the daily strugglers, they are currently overwhelmingly concerned with the cost of livingnoting. This group is the least likely to be retired, at only 27%.

3. **Comfortable traditionalists (Leave voting, financially comfortable)**. Also making up a third of the coalition, this Leave group is more middle-class and older, with nearly half of them retired. They are unlikely to be educated to university level. While they share the general concern with rising living costs, they clearly feel the effects less than others. They're closer to being 'values voters' than other groups, partly because their relative wealth shields them from the worst of the cost of living crisis; they are more interested in issues like the EU and illegal immigration.

4. **Good lifers (Remain voting, financially comfortable)**. Nearly a fifth of the coalition, this group is the most classically middle-class: a majority are graduates; the majority are in full-time work; and nearly two-thirds own their own home. They are Remain voters; most live in urban or suburban areas; and a fifth are between 18 and 34. Around a third are retired. (Indeed, it is worth noting that the make-up of these groups contradicts the widespread myth that the Tory party is supported exclusively by OAPs.)

The 2019 Conservative coalition





What they have in common

What made these voters choose the Conservatives in 2019? What do they have in common? A number of small things but, in truth, really only one big thing: British patriotism.

Across our polling, the members of the New Majority are much, much more likely than other groups to say they are proud to be British and much more likely to say their identity is strongly British. Furthermore, they are more likely to say they support the Royal Family and respect the Armed Forces.

To many observers, this might seem like a small thing. But it's huge. And it also helps explain the 2019 result. At the last election, the choice was partly framed (fairly or not) as a choice between a patriotic leader of a patriotic party – Boris Johnson's Conservatives – and an unpatriotic leader of a party ashamed to be British – Jeremy Corbyn's Labour.

In the 2017 election, this wasn't an issue, with few people labelling Corbyn 'unpatriotic' when polled. But from the summer of 2018, large numbers of people began to question whether Corbyn was hostile to British interests and its history and traditional culture. That probably reflected widespread coverage of Corbyn's supposed sympathy for the IRA and hardline pro-Palestine groups, but there was also, crucially, his tin-eared reaction to the Russia-backed poisonings in Salisbury. Focus groups from the middle of 2018 carried out by the current author and others showed voters became obsessed with Corbyn's apparent lack of patriotism, meaning that his apparent 'anti-Britishness' became a viable attack line for the Conservatives.

With Keir Starmer in place, the 'anti-British' attack line is much less viable. To most voters, Starmer seems like a perfectly conventional and quietly patriotic politician; in fact, he is straight out of central casting for a 'serious politician'. However, the media and social media are awash with stories about left-wing attacks on British history and historical memory, on the institutions of the state, and so on. Some of these attacks come from Labour politicians and many come from Labour activists. As such, for many Conservatives, British patriotism remains under threat – and the Conservatives' defence of it is often heard, respected and acted upon at the ballot box. In short, British patriotism is a powerful force and binds the Conservative coalition together.

Elsewhere, there are various issues and values which unite two or three of the four blocs of the Tory coalition, but where one or two disagree. For example, good lifers aren't particularly in favour of tougher sentencing, while the other three are; daily strugglers and comfortable traditionalists are concerned about illegal immigration, while the others aren't; daily strugglers and comfortable traditionalists are more sceptical than others about the power of the Government to help solve social problems.

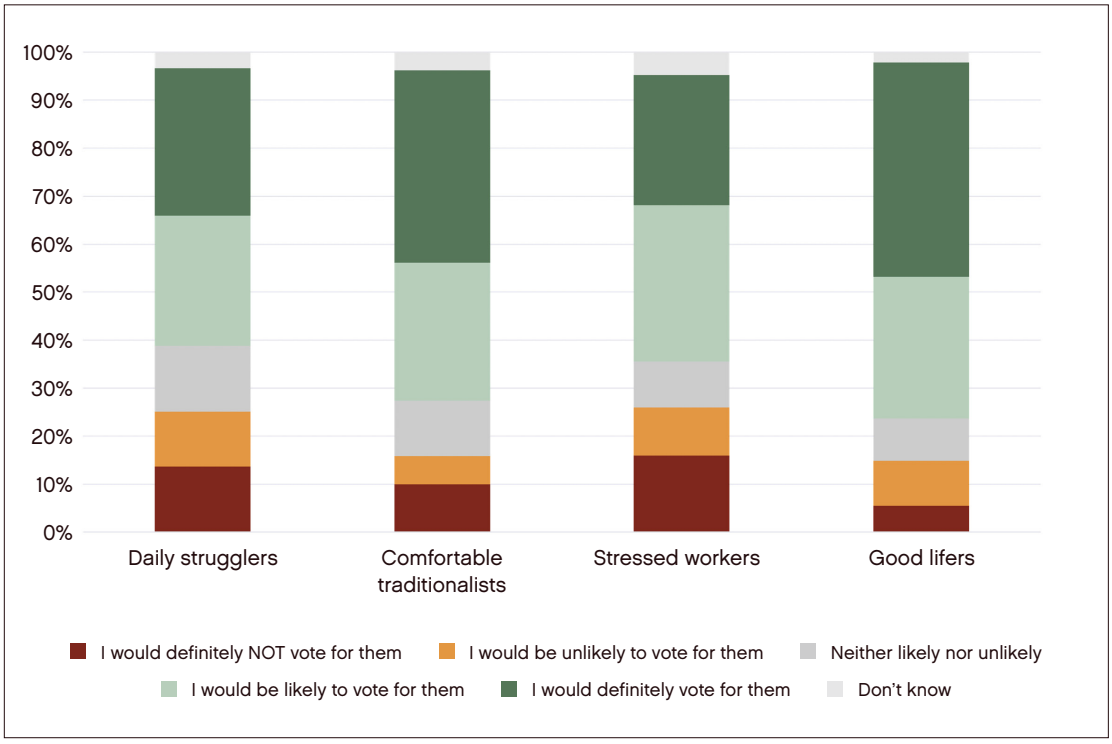
Broadly speaking, however, on social issues the coalition is divided by Leave/Remain, while on economic issues it's divided on wealth. These are the dividing lines across the coalition. Which of these is strongest? In our experience, the Leave/Remain divide was the greater determinant for political outlook in the few years following the referendum and Boris Johnson's ascent to power. However, it appears this influence is waning somewhat and is being replaced by wealth – which makes sense given the impact of the cost of living crisis. This is currently determining who is staying within the coalition and who is exiting or wobbling.

How working-class voters are wobbling

The Conservatives have lost ground full stop with their voters; many say they won't vote for the party at the next election. However, it's among the less affluent groups where the Tories are seriously wobbling:

- 25% of daily strugglers say they will definitely not vote for the Conservatives next time around;
- 26% of stressed workers say they will definitely not vote for the Conservatives;
- This compares to 16% of comfortable traditionalists and 14% of good lifers.

Voting intention – Conservative



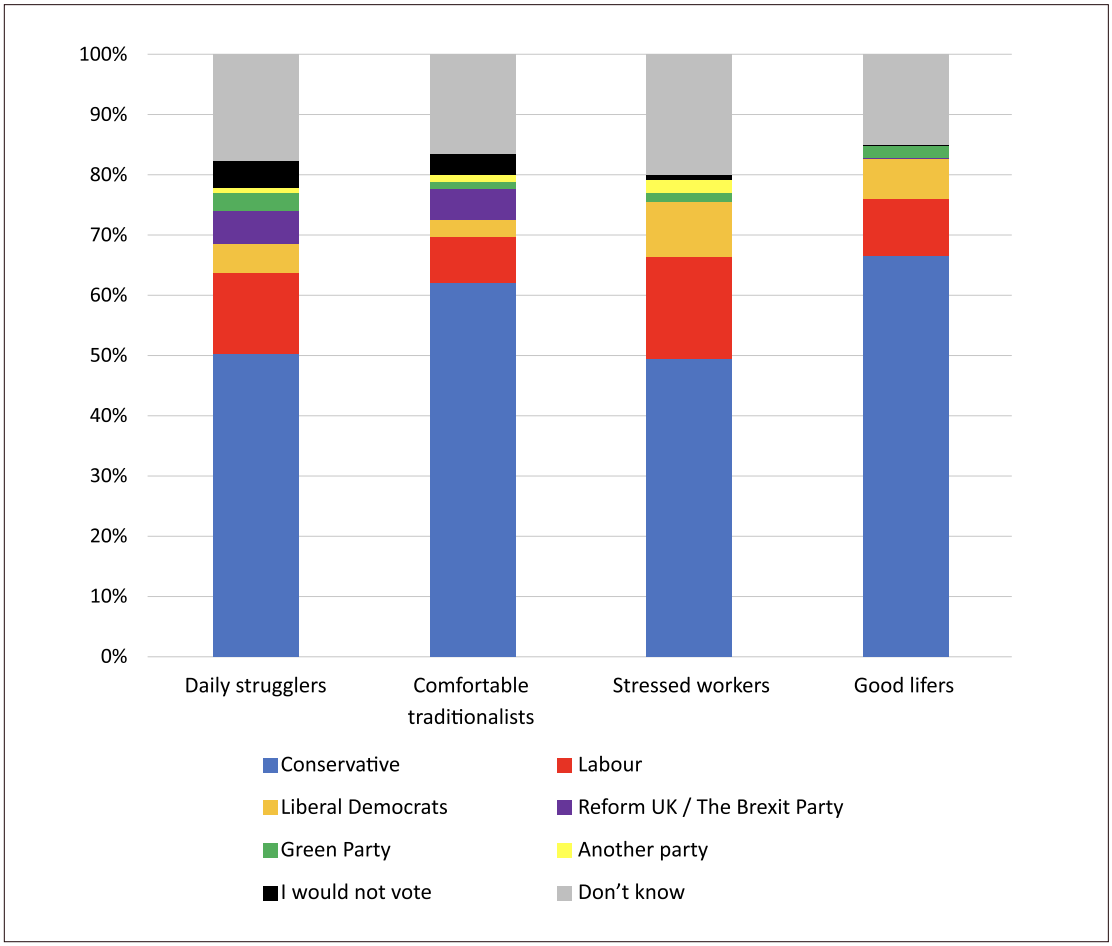
This spread of sentiment is reflected in the question of whether people think the Government has generally done a good job since it was elected in 2019. Daily strugglers agree that the Government has done a good job by 54% to 24% (with the rest saying it has done neither a good job nor a bad job). Stressed workers agree by 46% to 26%. However, the more affluent Tory groups are more positive: by 67% to 15%, comfortable traditionalists think the Government has done a good job, and by 65% to 17% good lifers also agree.

When we asked this question, during the Conservative leadership race, we also whether Boris Johnson's exit had made it more or less likely that people would vote Conservative. Interestingly, while a majority of Tory voters said his exit had made no difference, twice as many daily strugglers said it made them less rather than more likely to vote Conservative. In all other groups the opposite was the case (with a majority unbothered, but more saying they would be more likely than less likely to vote Conservative).

This raises a legitimate question that we should address early: is it really Boris Johnson's exit that has caused working-class voters to wobble? For a small minority, it's certainly a part of it. In Public First's focus groups, both for the Centre for Policy Studies and separately for the Times, working-class voters were more likely to express sympathy and support for Boris Johnson. However, this sentiment clearly isn't shared by working-class Remainers.

More importantly, throughout our polling for this project, it's clear that the Conservatives' numbers on the economy are terrible among working-class voters – and that this is the overwhelmingly dominant issue for the public. So it's clear it's financial status that is primarily driving attitudes, rather than the issue of the leadership.

Where are these voters going?



For working-class Conservatives, Labour seem like they should be the competition. In focus groups in post-industrial areas, many working-class Conservatives reveal themselves to be former Labour voters. However, as it stands, these groups are not wholeheartedly switching to Labour.

Stressed workers are the most likely to have switched directly to Labour, with 17% now expressing their intention to vote Labour. Among the Leave-voting groups, a small group are switching to Reform UK; of the Remain-voting groups, a small number are now planning to vote Lib Dem. A large chunk of every group, however, is now unsure of their vote, saying they do not know how they will vote if a general election is called tomorrow.

> **'Stressed workers are the most likely to have switched directly to Labour, with 17% now expressing their intention to vote Labour'**

These voters are therefore – currently, at least – still very much in play. Intriguingly, and perhaps crucially for a future general election, only 5% of the group who voted Conservative in 2019, but were now unsure of their vote, told us they completely ruled out voting for the Conservatives at the next general election. (Though we suspect that figure will grow, as outlined at length below, if they perceive the party to have betrayed them over cost of living.)

Given the less affluent groups are wobbling most, it makes sense to look in detail at how the Conservatives can boost their position with them. In this report, we therefore pay particular attention to daily strugglers and stressed workers. We look closely at who they are and their attitudes and values. We then look at how best the Conservatives can persuade them to stay.

In doing so, there are some important additional questions. Is it even possible to maintain the centre-right coalition going forward? Was the broadening of the Tory coalition in 2019 a temporary phenomenon, driven by a specific and unrepeatable set of circumstances (Brexit, Boris, Corbyn etc)? If so, what does a more viable coalition look like – and which groups should be prioritised?

We will answer these questions implicitly through the analysis of these groups, before answering it explicitly and directly at the end.

Chapter Two: The Daily Strugglers

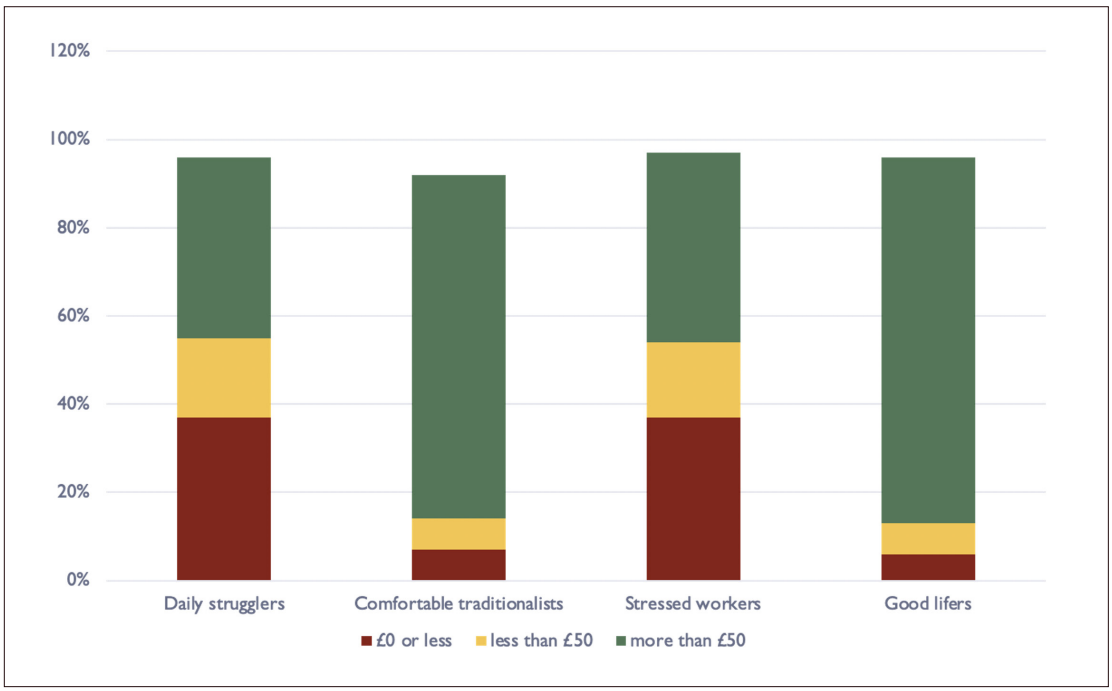
The lives of daily strugglers

Daily strugglers made up a third of the 2019 Conservative vote, just slightly smaller than the affluent, middle-class, socially conservative group we call the comfortable traditionalists. Many daily strugglers are recent Conservatives, having joined the coalition because of a specific set of issues, chiefly Brexit (or, more accurately, the prospect of greater border control), or a sense of patriotism they thought ran through the Conservatives but not through Labour. They all (by definition) voted Leave in 2016 and some came to the Conservatives via Nigel Farage.

While their Euroscepticism is important, the daily strugglers' views are increasingly dominated by their precarious financial status. This makes sense. The comfortable traditionalists are the group I have previously described as 'just about managing'. They have been mostly Conservative voters for some years now (generally coming on board in the mid-2000s) and are more likely to be B or C1/C2 on the social scale. The daily struggler group is different from their fellow Leave voters; they are much less affluent and are more likely to be C2/D.

Overall, around 70% of daily strugglers are homeowners, but very few own their homes outright. They are more likely to be in precarious lines of semi-skilled and unskilled work – often temporary work – in hospitality, retail, warehouses and factories. Half of our sample live in households led by a manual worker. Only half of them are able to put aside more than £50 each month. A significant minority are out of work and live in rented social housing.

Amount of savings every month



Even a decade ago, most of these daily strugglers would have voted Labour. In fact, many will have come from families which had a historical antipathy towards the Conservatives. In focus groups in their years of electoral transition – the late 2010s – many would talk about in an almost embarrassed way about their planned Conservative vote, about how their grandparents would have been horrified by their electoral choice.

As with the other major group who are wobbling – the stressed workers – the obvious question to ask is how conservative this group are, and whether their Conservative vote was entirely transitory or transactional.

We will deal with this later in detail but, in brief, our view is the issues they moved over to the Conservatives on – Brexit, border control, patriotism – are going to be defining issues within British politics for some time; and the major differences between the Conservatives and Labour on these issues are such they'll remain more attracted to the Tory approach. To put it another way, they just don't feel or sound like modern Labour voters.

'14% say they'd never vote for the Conservative Party again and an additional 11% say they'd be unlikely to'

More importantly, for the next few years, their worries on the economy mean they are going to be open to messages which focus on and offer the prospect of lower taxes, less waste, more jobs, more growth, and so on. While historically they've been in favour of higher spending, our sense from dozens of focus groups is that they're becoming more open to cuts – not ideologically to somehow 'cut the state down to size', but to establish headroom for the Government to be able to provide help for them on cost of living through personal tax cuts, subsidies or equivalent.

Admittedly, there's obviously a compelling Labour narrative on the need to tax the rich and big business, and it is possible that perceived Conservative failings on the economy will irritate and anger working-class voters so much that they peel away in great numbers. However, the Conservatives have historically been competitive on the economy and ought to remain so.

This is not to say their wobbles are inherently temporary or that these voters have (to use a classic political term) 'nowhere to go'. On the contrary, they could go to a number of different parties. The point is that they're not Labour voters who happened to vote Conservative because of Boris, Brexit and immigration. They're potentially in play for the centre-right for the longer term.

Attitudes to the Conservative Party

Daily strugglers' attitudes to the Conservative Party itself are complex. They obviously voted Conservative in 2019, but 14% say they'd never vote for the Conservative Party again and an additional 11% say they'd be unlikely to. Some 23% say they're less likely to vote Conservative after Boris Johnson's resignation and 36% say he shouldn't have resigned at all (compared to 19% of the public as a whole).

Digging deeper, there are reasons for the Tories to be both optimistic and pessimistic. Asked about the values they take most seriously themselves, the daily strugglers name family, freedom (a new one, post-Covid), fairness and tradition. When asked about what values they most associate the Conservatives with, they name tradition, patriotism, ambition and hard work. So there is not a total misalignment here.

The problem for the Tories is that when asked about who they think the Conservatives care about most, they say – by a large margin – people on high incomes and businesspeople. They essentially still view the Conservatives as the Party of the rich. This is particular bad when they're incandescent about the cost of living and about the Conservatives' perceived failure to deal with it.

How they differ from Labour voters

While their support for the Conservatives is waning, daily strugglers have a considerable way to go before they resemble current Labour voters as a group. They are considerably more concerned about levels of immigration (36% compared to 8%), and more likely to say they're proud to be British and English. They're more likely than Labour supporters to place tradition and hard work among their top values, and less likely to put equality high up, which is one of the key values for those planning to vote Labour.

'62% say they're 'very worried' about rising inflation and rising costs, compared to the national average of 52%'

On a range of metrics, Labour supporters still outstrip daily strugglers in their support for income redistribution and typically 'left-wing' views on the economy – although, as we will discuss later, daily strugglers tend to hold these same views at an aggregate level, just less strongly. Equally, Labour voters tend to hold similar 'authoritarian' views on crime, education and censorship at an aggregate level, but to a lesser extent than the daily strugglers.

Daily strugglers align with Labour voters on their worry about rising inflation and costs. Current Labour supporters generally tend to be more concerned than Conservatives about rising inflation and costs (61% compared to 36% saying they are 'very concerned'), but the daily strugglers draw level with Labour supporters on this question. They blame slightly different things (they are more likely to blame conflict in Ukraine, and much less likely to blame Brexit), and apportion blame primarily on other governments besides the UK's. But with almost half of daily strugglers currently holding the Government at least partly responsible for the crisis, this could change.

It is also clear that daily strugglers feel more politically unrepresented than the rest of the 2019 coalition. In fact, with 47% agreeing they feel like their vote has never had an impact, they only just tail Labour supporters – of whom 51% agree. They are also slightly more likely than Labour supporters to agree that none of the political parties represent their political views, and as likely as Labour to disagree that there is a political party for everyone in the UK (although they still tend to agree overall).

While they don't align perfectly with modern Labour voters and aren't all peeling off to Labour, our research shows clearly that Labour is a perfectly reasonable electoral destination for them –particularly if Keir Starmer continues to moderate the excesses of the activist class within the Labour Party.

How financial concerns dominate their outlook

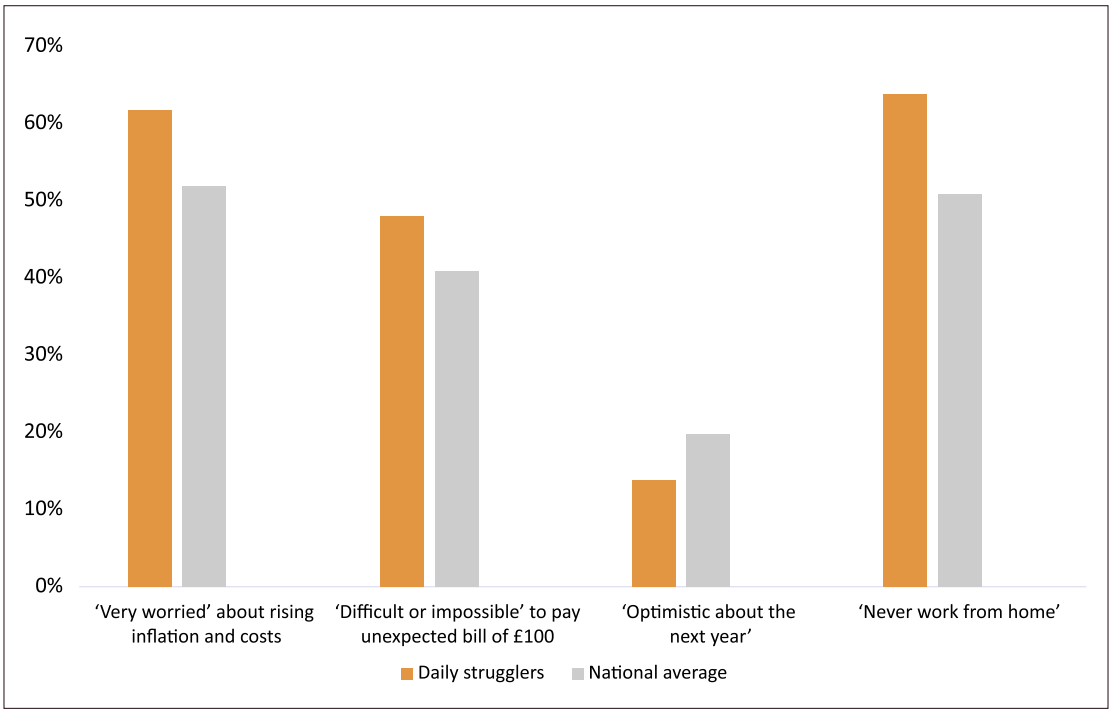
As the name suggests, this group struggles and they will struggle more and more in the next few years. Struggle will completely consume their lives and affect how they see almost everything – from where they shop, to whether they can have a holiday, to what they can buy their children for Christmas.

Their earning potential is relatively low and they can't save much. Consequently, they're the group most likely to name the cost of living as the top concern facing their family – not just the most likely of the groups that make up the Conservative coalition, but of every demographic group across our polling. The issues they name as most important to their family are cost of living, the economy and the quality of the NHS. They name the same issues for the top issues facing the country.

Their own financial circumstances are strained:

- 62% say they're 'very worried' about rising inflation and rising costs, compared to the national average of 52%. Within the Conservative coalition, only stressed workers are more worried, with 71% saying they're very worried.
- 48% say they'd find it difficult or impossible to pay an unexpected bill of £100, compared to the national average of 41%; 70% say they'd find it difficult or impossible to pay an unexpected bill of £500, compared to the national average of 56%.
- Just 14% say they're optimistic about the next year, compared to the national average of 20%; this is the lowest figure within the Conservative coalition.
- They're much less likely to say they work from home than other groups: 64% say they never work at home, compared to the national average of 51%.

Daily strugglers



In other, more recent polling by Public First for The Sunday Telegraph – more narrowly on the cost of living – we found their fears were growing:

- Nearly half said they couldn't pay energy bills if they reach the levels that are commonly expected;
- A third said they couldn't last more than a month if the main breadwinner lost their job;
- 80% said they are cutting back on non-essential spending;

- Just 23% expect a pay rise of any kind in the next year; 78% doubt they'll get a pay rise linked to inflation;
- 84% agree that the gap between rich and poor is growing;
- A majority believe the cost of living crisis will see more people being cut off from utilities, more homelessness, more repossessions of homes, and more people shoplifting.

The magnitude of these concerns was echoed in our group discussions:

> *'I am definitely feeling the pinch on the cost of living... You know, my electric bill – and I know my gas – has doubled. So I'm keeping an eye on that. Is that going to scare me more than I've planned in my head? At the end of the month? I'm lucky that my energy supplier will invoice me at the end of the month, so we're not waiting three months for the quarterly people to find out how bad it's gonna be. It's not gonna look very good, is it? 2019 In 2022, people won't believe what's happened. I don't think you could actually write it all down.' (Middle-aged working-class woman, Wolverhampton).*

'Just 23% expect a pay rise of any kind in the next year; 78% doubt they'll get a pay rise linked to inflation'

> *'Considering where we travel to with the fuel costs – my husband often does 20-30 mile round trips for nights out and I'm having to be realistic and say, 'do you actually need to go? Do you think you need to just, you know, miss one?' Just so I know that the fuel is going to be there for those essential trips of dropping the kids off where they need to be. And not running out of money at the end of the week.' (Middle-aged working-class woman, Wolverhampton).*

Such was the expected scale of rising costs that many, bordering on most, expected not to be able to pay their bills come winter. Some offered that they had already actively discussed with friends the possibility of not paying their bills.

> *'I'm going to tell you something honestly, now a lot of people I've been speaking to have literally point blank told me that if they start to increase anymore, they will point blank refuse to pay the bills, and – not my words – 'and everybody should'. What will they do then? That kind of made me think, well, what would they do then?' (Middle-aged working-class woman, Bury).*

The idea that there could be boycotts if prices continue to rise was popular with daily strugglers, who shared a desire for action, largely out of desperation.

> *'If in autumn, there's a rise of 40% on bills. I'm gonna stand up. And I'm gonna start doing something, because I can't afford life. I can't afford life right now.' (Middle-aged working-class woman, Bury).*

But there were some who raised concerns about being cut off by the energy companies, unless everyone took part.

> *'Unless everybody does it, no [I won't boycott]. Because there'll still be people paying and the energy companies won't really care. They'll just cut off your supply. So it has to be the majority of people that do it.' (Middle-aged working-class man, Bury).*

With all this in mind, it's not hard to see how their vote will be determined almost entirely by who they think will best help them out. This isn't about selfishness; what else are they supposed to do when they genuinely fear that they won't be able to pay their rent or mortgage, to heat and light their homes, or put food on the table?

The character and values of the daily strugglers

You can't understand the daily strugglers without understanding their financially precarious state. During the cost of living crisis, this is determining their views on a range of issues. But you also can't understand them without digging deep into their character and values, which determine how they consider the politics of the crisis. This allows us to understand why they blame particular groups or causes, the sorts of national policies they want to see mitigate the crisis, and so on. At a more practical level, it helps understand the language and messaging the Conservatives should adopt in their campaigns.

The daily strugglers are the closest you get in the current Tory coalition to populists, in the classic American sense of the term – ie people who are driven by self-consciously 'fair' economic policies, while also expressing support for their country and for law and order. Across a broad range of questions, this comes through very strongly.

They're motivated personally primarily by the values of 'family' – the value which most frequently appears among the top five most important values for the group – followed by 'freedom', 'fairness', 'tradition' and 'hard work'. In this sense, they're not so different from others in the centre-right coalition.

Values that are personally important

	Top value	2nd	3rd	4th
Population	Family	Fairness	Freedom	Equality
Daily strugglers	Family	Freedom	Freedom	Hard work
Comfortable traditionalists	Family	Fairness	Freedom	Decency
Stressed workers	Family	Fairness	Freedom	Decency
Good lifers	Family	Fairness	Decency	Hard work

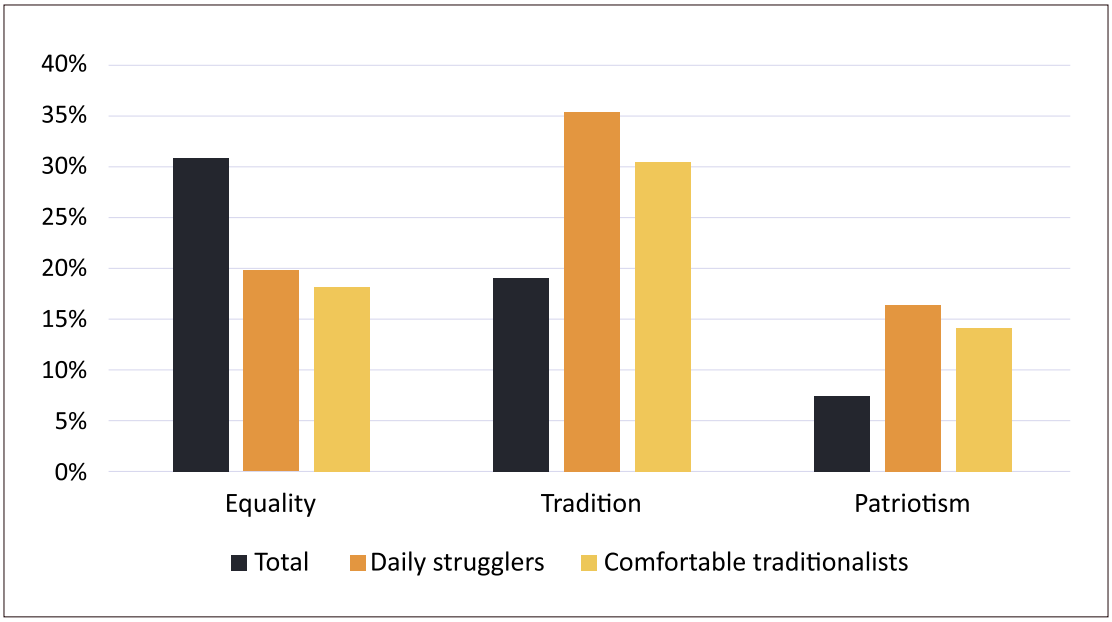
Values associated with the Conservative Party

	Top value	2nd	3rd	4th
Population	Tradition	Patriotism	Ambition	Entrepreneurship
Daily strugglers	Tradition	Patriotism	Ambition	Entrepreneurship Opportunity
Comfortable traditionalists	Tradition	Patriotism	Opportunity	Ambition
Stressed workers	Patriotism	Tradition	Opportunity	Ambition
Good lifers	Tradition	Patriotism	Hard work/Opportunity/ Entrepreneurship	

However, the daily strugglers stand out from the other parts of the 2019 Conservative coalition in their stated patriotism: 16% put 'patriotism' among their top five most important values from our provided list. This is reflected in the way they think about issues like British history, the EU and border control; as we explain below, their patriotism is relatively more assertive than that of other groups.

In addition, compared to the other parts of the Tory coalition, they more often select tradition, freedom and family as being important to them. In the country as a whole, tradition is selected by 19%, but among daily strugglers this increases to 35%. Where daily strugglers differ particularly from the national average is in their attitudes towards 'equality'; 20% select this compared to 31% among the country as a whole.

Core values



When it comes to their own political ideology, fewer daily strugglers regard themselves as 'moderate' than the rest of the coalition, and more regard themselves as 'right-wing'. 'Conservative', unsurprisingly, still dominates this group's description of their own ideology.

Indeed, in our poll we asked a range of ideological questions; first on typically 'left-wing' and 'right-wing' economic views, and then on views towards authoritative government. In general, the daily struggler group tends to have more left-wing views on the economy, and a greater tendency towards authoritarian (ie tougher) viewpoints on crime; however, they have greater resistance to censorship than others in the coalition.

To be specific, 66% of daily strugglers agree that 'ordinary working people do not get their fair share of the nation's wealth'. That is a view shared by 68% of the public as a whole, but only 50% of comfortable traditionalists and 49% of good lifers. On a more explicitly left-wing question – whether 'government should redistribute income from the better-off to those who are less well-off' – daily strugglers tend to agree (40% agree, 29% disagree), where their Leave-voting counterparts among the comfortable traditionalists tend to disagree (30% agree, 38% disagree). The daily strugglers still agreed to a lesser extent than the general population, but they are broadly in line with the wider public on the other statements we tested. In our focus groups they tended to be the most likely to complain about the levels of poverty in the country.

'We are supposedly the fourth richest country in the world and yet one in four children are in poverty, how is that a thing? That shouldn't be happening. It shouldn't, not if we are one of the richest countries in the world; there shouldn't be that poverty in this country.' (Middle-aged working-class woman, Bury).

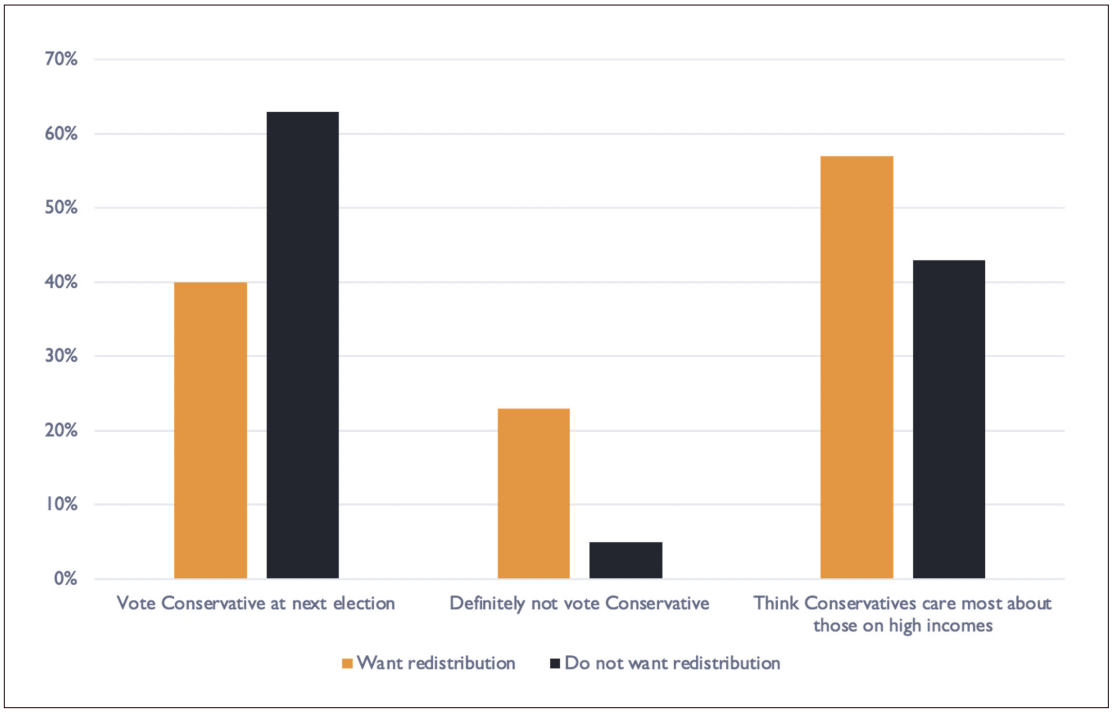
Similarly, they tend to feel management will try to get the better of employees, that there is one law for the rich and one for the poor, and that big business benefits owners at the expense of workers. Daily strugglers also express more scepticism about the private sector in general; a majority among the other groups agree 'private sector businesses are better at solving problems than the public sector', but the answer is less certain for daily strugglers, with only 47% agreeing.

These views towards business and management fit well within the context of the daily strugglers' general antipathy towards institutions, which I'll talk about in more detail later. A likely explanation is that, given the financial concerns which they face, they feel a need for economic change in a way that more financially comfortable Conservatives do not.

The significance of this issue for the Conservative party's electoral majority cannot be overstated. Among those daily strugglers who agreed that 'government should redistribute income from the better-off to those who are less well-off', only 40% say they would vote Conservative at the next election, with 24% now saying they will vote Labour. However, 63% of the daily strugglers who disagreed with redistribution said they will vote Conservative. Almost a quarter (23%) of pro-redistribution daily strugglers completely rule out voting Conservative at the next election, compared to 5% of their anti-redistribution equivalents. Furthermore, 57% of those who want redistribution see the Conservatives as caring most about people on high incomes, compared to just 43% of those who do not want this redistribution.

It is therefore hard not to assume that a perception of inaction from the Government when it comes to helping the least well-off will seriously jeopardise the Tories' relationship with the most financially uncomfortable among their electorate.

Daily strugglers by views on redistribution



When it comes to 'authoritarian' views, daily strugglers stand out among the Conservative coalition as some of the most resistant to censorship, but the most supportive of tough sentencing. A large majority of daily strugglers agree that for some crimes, the death penalty is the most appropriate sentence – a view which only just scrapes a majority among Remain-voting Conservatives. An even greater majority agree that young people today don't have enough respect for traditional British values.

Hostility to Government economic policy

Having looked at their 'philosophy', we now look at the daily strugglers' views on the economy more specifically.

It would appear that the Government's perceived failure to address rising costs is part of the explanation for members of this group peeling away from the Conservatives. When asked who's to blame for rising costs, nearly half say the UK government (below other countries, who they blame more; although this number does fluctuate). Furthermore, nearly half say the Government is capable of doing more to help but is choosing not to do so. Only stressed workers, who are also peeling away, are more likely to blame the Government for the problem and for failing to act. And when given a list of options for whom the Conservatives primarily represent, by far the top two options were businesspeople and those on high incomes.

'Daily strugglers are divided on whether they are personally taxed too much: around 40% each say they're taxed too high and a similar proportion that they're taxed the right amount'

This irritation and anger is mostly general, but if you dig a little deeper it becomes more specific. Daily strugglers were very hostile to the Government's increase in National Insurance Contributions. When asked whether the policy was good or bad, and implemented well or poorly, 60% labelled it a bad idea – higher than the national average of 57% (surprisingly high, given these are Conservative supporters). Given a list of options that explain why the cost of living has gone up, the suggestion that Government tax rises were to blame came around mid-table – with more daily strugglers blaming tax rises than other groups in the Conservative coalition.

Interestingly, however, daily strugglers are divided on whether they are personally taxed too much: around 40% each say they're taxed too high and a similar proportion that they're taxed the right amount. This makes them the least likely of the Conservative groups, along with the stressed workers, to feel their tax burden is adequate. (Needless to say, there is not much of a constituency for the suggestion that they are taxed too little.)

On fiscal policy more broadly, a majority of daily strugglers believe the Government should tax less and spend less. Furthermore, given a list of options for what the parties might put in their manifestos at the next election, the second most popular choice – behind clearing NHS backlogs – was cutting taxes to help reduce the cost of living. However, this group generally favour tax cuts for lower paid workers but tax increases on larger businesses and the wealthy. Given a list of reasons why taxes might be cut, the arguments they were most persuaded by were tax cuts on businesses to pay workers more, and tax cuts to help the high street.

The daily strugglers we spoke to through our qualitative research demonstrated their loose alignment with the Conservatives, and why economic success is such an important driving factor in their vote:

> *'The only reason I voted Conservative in the first place was because they promised to reduce taxes. So I thought that it would make a positive impact on the cost of living, and it just hasn't, in fact, it's done the opposite. It's disgusting really because they would never have got my vote in the first place.' (Younger middle-aged working-class woman, Bury).*

> *'You hear 'lowering tax', 'keeping taxes the same'; I've heard a lot about tax and National Insurance. It's the same every single time somebody is coming up for election. Even if they reduce your tax or whatever they do to it is minimal. It's not going to make any difference to us at the moment.' (Older working-class man, Bury).*

In short, this is a group of people who strongly believe economic policy should be directed at helping other poorer working-class voters like them – people they consider that have been left behind and let down in recent times.

The growth in anti-politics sentiment

Among daily strugglers, there's a general sense of frustration and anger over how they've been treated in recent times and how the country is doing. Economics and finance is the biggest driver of this, but the sentiment is wider:

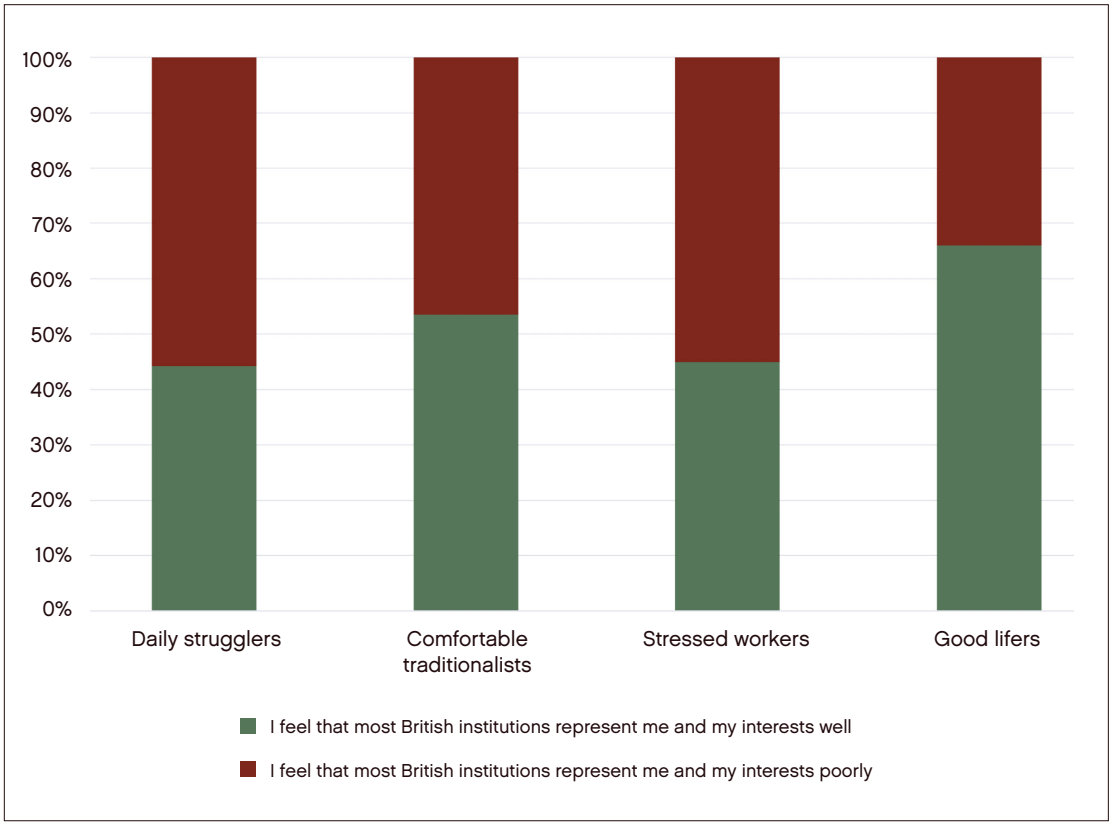
> *'I think all politicians are on their own side. I've said, I think no matter what's in their manifesto, to get your vote they'll do what they want when they've got the power. I don't think I'd vote Conservative again.' (Middle-aged working-class woman, Wolverhampton).*

As we discuss below, they think leaving the EU has been badly handled, as has the introduction of new immigration rules – despite the fact they support these policies in principle. Many of them think their towns and particularly their high streets have got worse.

'Among daily strugglers, there's a general sense of frustration and anger over how they've been treated in recent times and how the country is doing'

By 56% to 44% they think British institutions don't represent them well (the lowest in the Conservative coalition and only marginally higher than the national average – which will be dragged down by non-Tories who are hostile to the Government). They are also far more likely to say politicians are involved in politics for their own interests rather than to serve the public; this puts them in line with the national average, but means they are more hostile to politicians than others in the Conservative coalition – in fact, vastly more hostile than the two more affluent Tory groups. They also agree by 47% to 30% that 'I feel like my vote has never had an impact'. And they're the only Conservative group where more people agree than disagree that 'none of the political parties represent my political views'.

Views on institutions



This also extends to how they view the opposing parties. During our group discussions it was clear many people were open to switching their vote at the next election, but were being turned off by the constant criticism and level of abuse the major parties were directing at the Government:

> *'There's a bit of a clique – an old boys' network. I understand some of the things they have to do. But I just think it's just incompetence, the amount of money they have lost at furlough – furlough, fraud and whatnot. Reactive towards the things which have happened in the last two years; having no real plan, in case there was a pandemic, which is what these advisors are for. But I think both parties – as I said – there's nothing to choose' (Middle-aged working-class man, Wolverhampton).*

> *'I'm open to being persuaded [to vote for another party] .... but everything you're reading is criticising the Conservatives. We need somebody dynamic, we need somebody to address all the issues that are important to us and to tell us what they're gonna do and not what the other party did wrong; we know what they did wrong, and we're not interested.' (Older working-class woman, Bury).*

Their hostility to Government is practical rather than philosophical; they don't want to 'let freedom ring' and attempts to mobilise them towards libertarianism in the American mould would fail. Rather, large numbers of them just don't think anything works. This view, among a similar cohort, was prevalent in the 2000s when anti-politics sentiment grew in England. It appears that it is growing again.

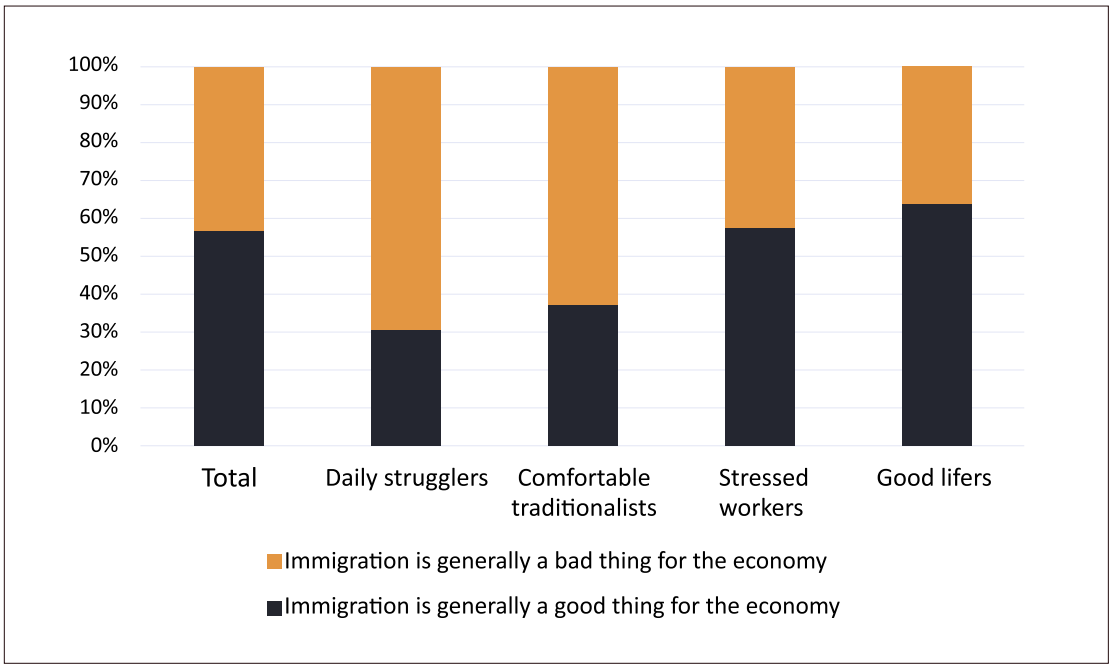
While three quarters think government should try to solve more problems than it does, just over half think the Government intervenes too much in our daily lives. Nearly two thirds believe the Government cannot help them solve problems in their daily lives (one of the highest of any group). Interestingly, nearly 30% say the NHS doesn't provide very good care.

Immigration, the economy and the EU

In our research in the past, we have generally found that working-class Conservatives oppose large-scale immigration, but that they see the issue through the prism of economics rather than culture. While Remain-leaning commentators have ascribed 'nativist' views to this cohort, in reality they're much more likely to express concerns about immigration by talking about competition for jobs and the effect on wages.

In our poll for this report, daily strugglers were the most likely of any group to say immigration is generally bad for the economy rather than good for the economy. They asserted this by 69% to 31%, while the older comfortable traditionalists agreed only by 63% to 37%. On average, most people in the country agreed that immigration was generally good for the economy – by 57% to 43%.

Views on immigration



Since last autumn at least, these working-class voters have expressed concern about the Government's failure to deal with the continued arrival of 'small boats' from France. With this in mind, the Government hasn't received much credit for its introduction of an 'Australian-style' points system for immigration; nearly half of daily strugglers say it was a good idea, though implemented poorly. Related to this, nearly half of daily strugglers, who all voted Leave, describe leaving the EU as a good idea but implemented poorly. This is almost certainly related to the state of the economy since we left the EU.

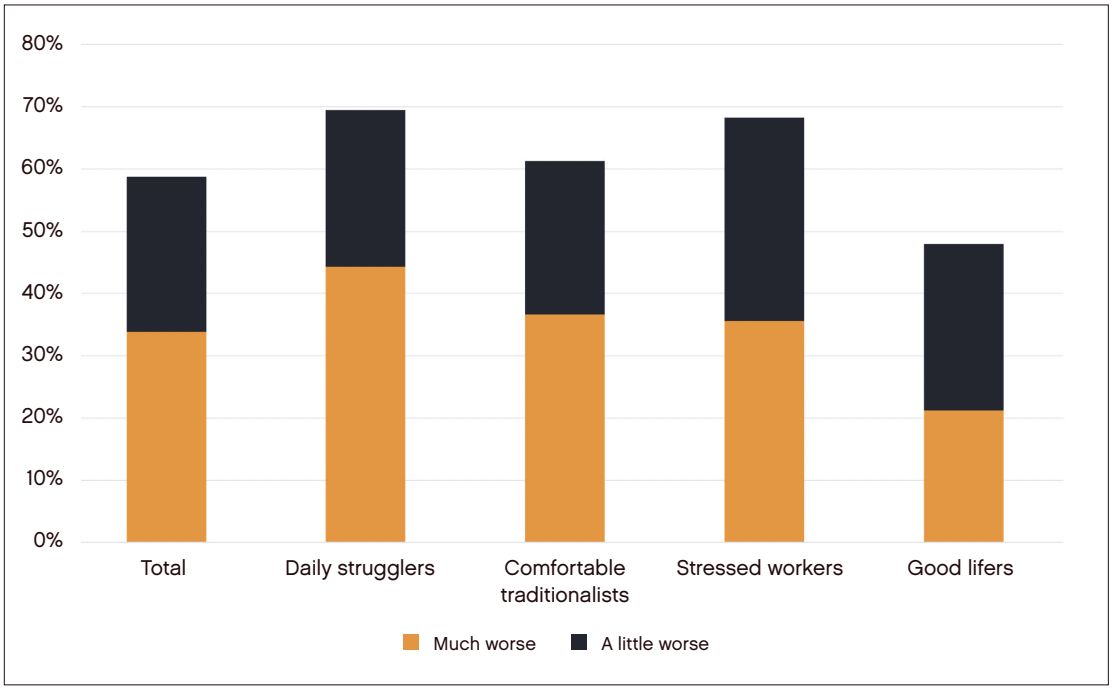
The importance of levelling up

We have been asking working-class voters about levelling up for nearly three years. In that time, voters have gone from knowing almost nothing about the idea, to knowing a fair amount. In any working-class focus group now, around a half to two-thirds will be familiar with the concept.

While many are sceptical it will make much difference, they support the Government making an effort. There is a particular desire for the Government to boost local high streets and to take them at least back to where they were in the mid-1990s.

In our research, we have found working-class Conservatives to be particularly concerned about the state of their towns. In our poll, nearly half of daily strugglers said their town had got worse in the last decade (the same as stressed workers) – significantly higher than the national average of 38%. Some 69% said their nearest high street had got worse. By 50% to 27%, they also agree that someone born 50 years ago will have a better life than someone born today.

% who say high street has become worse in last decade



When we talked about the decline of their local area and the high levels of poverty, participants were keen to point out the level of pride felt by people in these areas, and how difficult they found relying on others for help:

> *'At my school, where I work, it's shocking how many people are working and that are utilising food banks, it's heartbreaking. It really is. It's devastating. And you can see these people, they are proud people, but they've got no other choice.' (Younger middle-aged working-class woman, Bury).*

However, as with immigration and the EU, while daily strugglers support the concept of levelling up, they are frustrated with progress. Again, a little over half of these working-class voters said levelling up was a good idea but poorly implemented. There was a similar theme in our groups. Participants in Bury felt a palpable sense of frustration that they had not yet seen any improvement in their area:

> *'It's a good idea. The divide's still there. And people who live in the North like us feel it, feel it very strongly, and it didn't happen. And it needs to happen. They've invested a lot of money in Manchester city centre and saying it's like a mini London. But then we don't get the salaries. We don't get the same things as London, but the prices in Manchester are going like London.' (Younger working-class woman, Bury).*

There was some level of sympathy for the government's lack of delivery because of Covid and the war in Ukraine.

'I don't think it's been easy though with coronavirus, and then the trouble in the Ukraine; it's taken a lot away from what they had to do for the country. I'm not sure if anybody else would have done any different. The coronavirus has cost absolutely billions. And what we're going through at the moment isn't just us. There's lots of countries in the whole world that are all going through exactly the same as we are because of coronavirus.' (Middle-aged working-class man, Bury).

But most daily strugglers had no patience for the government's slow progress:

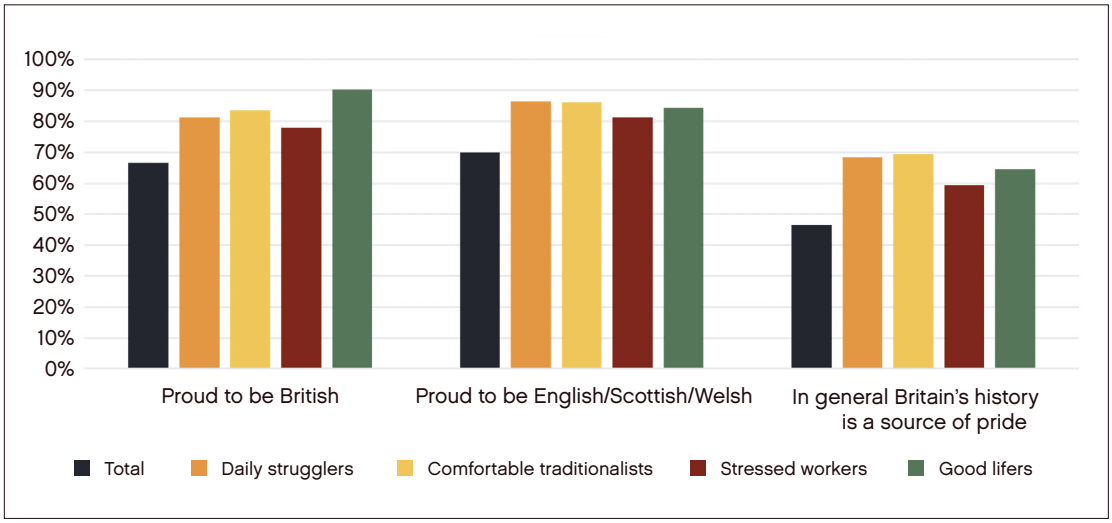
'I still think they should have made more progress to be fair. It's not my responsibility. It's not your responsibility. It's their responsibility. I know they weren't prepared for the pandemic, but maybe they should have been. And that's that.' (Middle-aged working-class woman, Bury).

Working-class Conservatives often talk about anti-social behaviour in the context of levelling up. They are also, predictably, extremely tough on crime. In this poll, they were the group who were most likely to say sentences were too lenient: by 87% to 12% they thought sentences for serious crimes were too lenient.

Patriotism and culture

For all their hostility to Government, and the fact they feel angry and frustrated towards Government, this group remains very patriotic. In terms of identit, they lean towards England rather than Britain, although it's a close-run thing: 86% say they are proud to be English (or Scottish or Welsh, but the vast majority of this cohort are English) and 82% say they're proud to be British. Along with comfortable traditionalists, they are very likely to express pride in Britain's past, rather than shame.

Views on patriotism



It is often lazily assumed – partly because this group of working-class voters is so patriotic – that they must be enthusiastic for the start of a culture war; there is an assumption this group is very 'small-c' conservative. In fact, this is not the case at all: given a suggested list of things that politicians and the media have focused on and asked which they think are important, discussions around gender comes bottom. Furthermore, in the list of suggested policy options the parties could announce in their manifestos, banning gender neutral toilets came in the lower half of the list.

Chapter Three: The Stressed Workers

The lives of stressed workers

Stressed workers are the smallest part of the centre-right coalition – around 10%. They are Remainers. While they lean lower-middle-class 'professional' (towards C1) and lean younger, most aren't graduates and they are still in a financially precarious position. Like the daily strugglers, half can't save more than £50 a month.

A third of our sample work in the public sector. They're more likely to live in larger towns and cities. They're more likely than other groups within the coalition to be from an ethnic minority, although this number is still relatively small.

'Among stressed workers, 70% would increase taxes on those earning over £80,000, closer to the 73% of Labour supporters than the 58% of financially comfortable 2019 Conservative voters'

As with daily strugglers, stressed workers' lives are dominated by concerns about the cost of living. This is unlikely to change for some time – and as with daily strugglers, the way the Conservatives handle the crisis will determine their vote at the next election and beyond.

Attitudes to the Conservative Party

Stressed workers' attitudes to the Conservative Party largely mirror those of the daily strugglers – although they're less positive overall because they don't have fond views of Boris Johnson or Brexit. Some 78% say Johnson was right to resign and more than a quarter say they're more likely to vote for the Party with him gone.

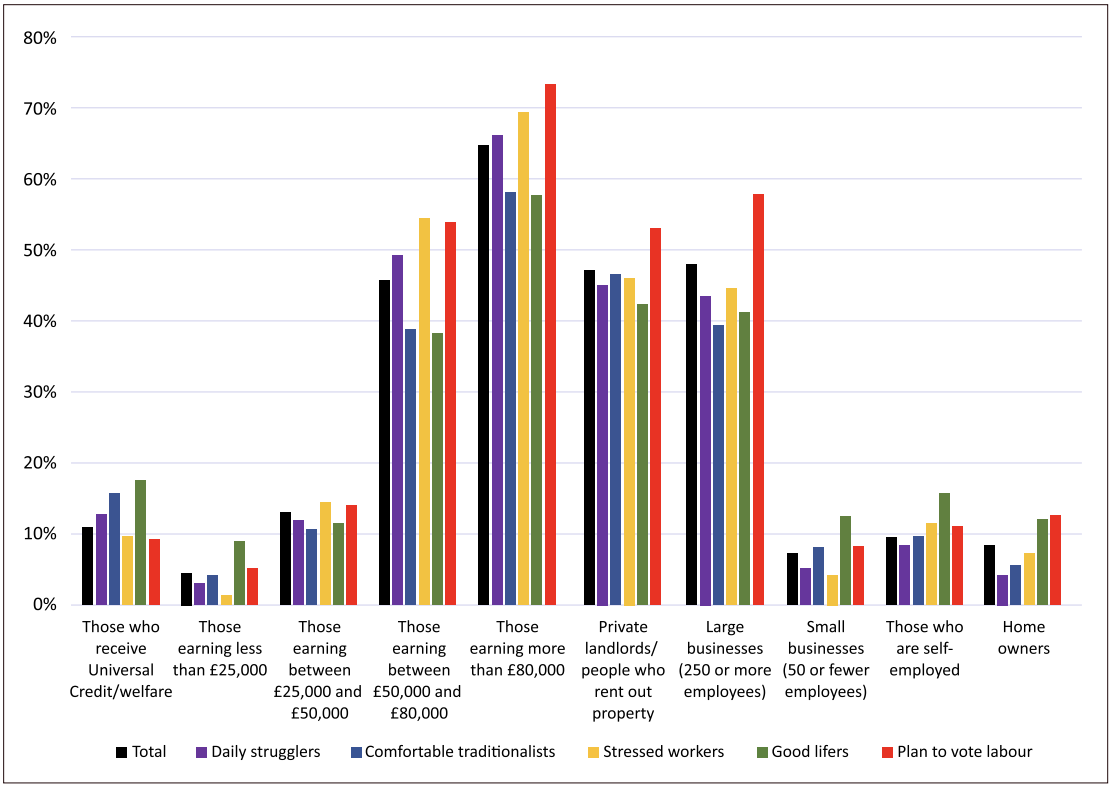
Again, stressed workers overwhelmingly believe the Conservative Party mainly cares most about those on high incomes and businesspeople. Asked which values they most closely associate with the Conservative Party, and they name patriotism, tradition, opportunity and ambition.

As with daily strugglers, the core electoral problem is that this group of working-class voters have negative attitudes to the Conservatives on their biggest vulnerability: they think the Party is primarily for the rich when they are personally struggling, and will be for some time.

How they differ from Labour voters

The stressed workers, unlike the daily strugglers, appear relatively similar to Labour supporters on issues which matter most to them: they are the only one of our four groups to actually prioritise cost of living more than Labour supporters. Their left-wing tilt on economics is reflected in a number of their views: for example, 70% would increase taxes on those earning over £80,000, closer to the 73% of Labour supporters than the 58% of financially comfortable 2019 Conservative voters. A majority also want higher taxes on those earning £50,000-£80,000, in line with Labour supporters.

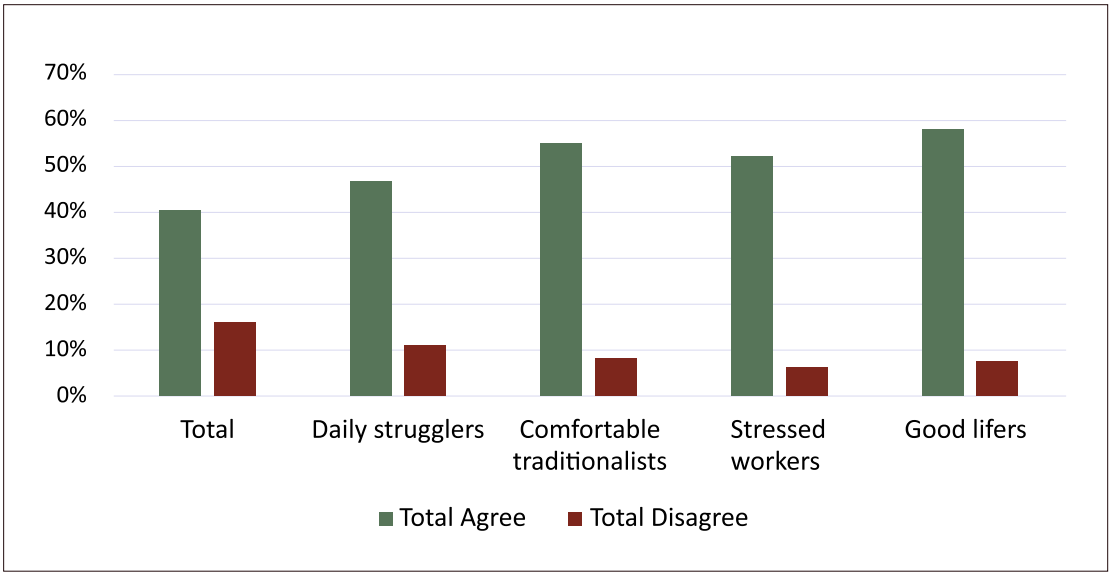
Proportion saying taxes on the following should be increased



As with daily strugglers, the differences between stressed workers and Labour supporters on the left-wing and authoritarianism questions is typically one of magnitude not direction. Their views on the right to protest are nearly identical to Labour supporters (unlike the other Tory-voting groups), and their narrower support for the death penalty is closer to Labour supporters' stance than it is to the Leave-voting portion of 2019 Conservatives.

There are some areas where there are stark differences between the stressed workers and the average Labour supporter, such as abolishing the Royal Family – where Labour supporters are torn and stressed workers strongly oppose. A majority of stressed workers view Britain's history as a source of pride, something only a third of Labour supporters feel. Compared to Labour supporters, they also display a greater level of belief in the private sector as a problem-solver vs the public sector.

Private sector businesses are better at solving problems than the public sector

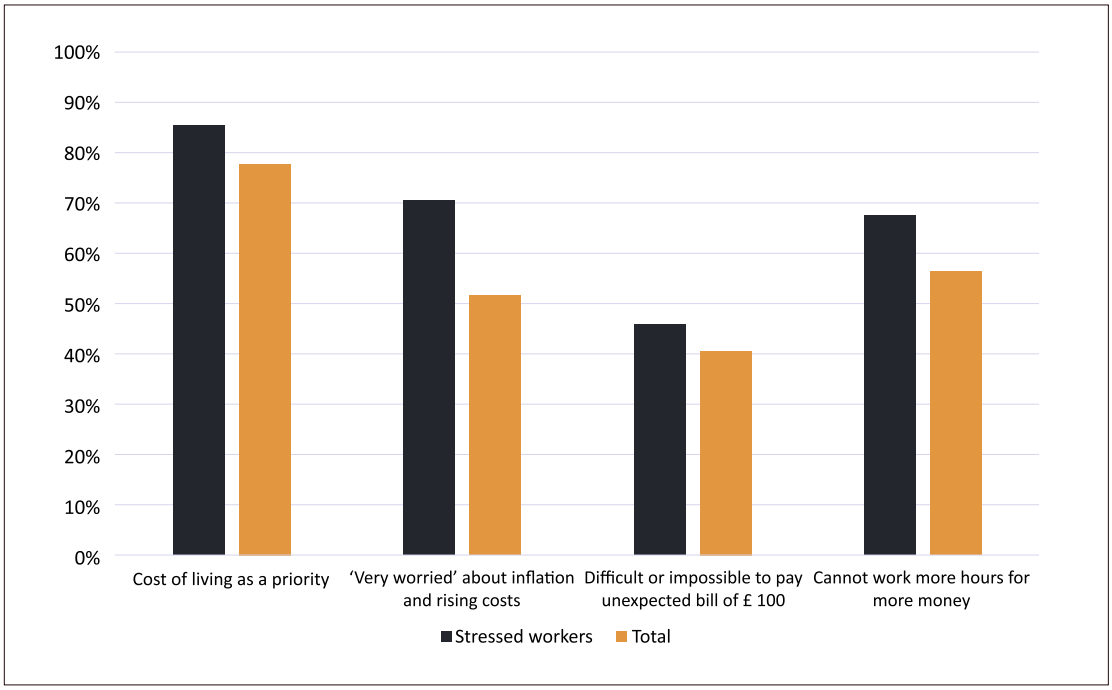


They're also less likely to value equality than Labour supporters, but the differences on other values are quite narrow; even on tradition – which normally separates Conservative groups from Labour – stressed workers only select this value 6% more frequently than the average.

How financial struggles dominate their outlook

The financial status of stressed workers looks similarly bleak to the daily strugglers. In fact, if anything, their predicament feels worse.

Financial exposure of stressed workers



- They put the cost of living top of the issues facing them and their family by a long way – the highest of any group in the poll;
- They're the group most likely to say they are 'very worried' about inflation and rising costs (71% compared to a national average of 52% and just 24% of comfortable traditionalists);
- Nearly half (46%) say they would find it difficult to deal with an unexpected bill of £100;
- 68% say they couldn't work more hours to make more money, the highest number within the Tory coalition.

This was reflected in our focus group conversations, where all of the participants had made lifestyle changes, and some showed serious concern for how they were going to feed their families:

> *'I've definitely cut back on food. I think it's worse anyway in the holidays if you've got kids. With eating and things like that, because they just snack throughout the day. But mine are on packed lunches at school. And that's just a ridiculous amount to spend.' (Younger middle-aged working-class woman, Greater Manchester).*

Their character and values

The character and values of stressed workers are easy to understand through the lens of a) concern for their own finances; and b) their location on what we might casually call the 'left' of the party.

'Stressed workers are less affluent and lean further left than other members of the Conservative coalition'

As they are both financially insecure, and self-define as more 'moderate', they tend to be considerably more open to income redistribution. For this group alone, a manifesto pledge to 'spend more to support people with their costs' is just as popular as a manifesto pledge to 'reduce people's taxes' as a means to tackling cost of living. It is likely this group, from an ideological point of view, will be hardest for the Conservatives to keep on board; a lack of action on income inequality will not only frustrate this group on a personal level, but from an ideological angle too:

> *'I think the government doesn't have any leadership ability. And these energy companies are just running rings around them to be honest, they should be doing more to help people rather than pushing us all towards the poverty line.' (Older middle-aged, working-class woman, Greater Manchester).*

The most important value for the stressed workers is still family – although, as with richer Tory Remain voters, this scores slightly lower than it does among Leave voters. Family is followed by 'fairness', 'freedom' and 'decency'. 'Hard work', which features highly among the other segments, scores slightly lower among the stressed workers.

As mentioned above, the difference between stressed workers (and good lifers for that matter) and the rest of the coalition is most evidently displayed on 'tradition', which only 19% place among their top five values compared to around a third of the Leave-voting bloc.

Given stressed workers are less affluent and lean further left than other members of the Conservative coalition, their stance on economic principles is often pretty starkly different from that of other Conservative 2019 supporters. This comes through most clearly on the question of whether the Government should redistribute income from the better-off to those who are less well off, where nearly half of stressed workers agree (easily the most of the four groups). They share the rest of the coalition's analysis on inequality, with a large majority agreeing that ordinary workers don't get their fair share of the nation's wealth, and that there is one law for the rich and one for the poor.

'Stressed workers are the only part of the New Majority where 'moderate' pips 'conservative' as a way to describe themselves'

Although, like the rest of the coalition, they are largely uninterested in 'culture war' questions as opposed to economic pressures, they lean slightly towards disagreement at the prospect of keeping both very left-wing and very right-wing opinions out of the media. In line with other Conservatives, a majority believe that the censorship of films and media is necessary to uphold moral standards, and a majority agree that racist or sexist speech should be censored.

On authoritarian responses to crime and disorder, where we often see Remain-voting groups expressing more liberal opinions, stressed workers are no different. Half agree the death penalty is the most appropriate sentence for some crimes, which is high relative to Labour supporters but is lower than the Leave-voting portion of the Tory coalition. They are also the most supportive of protest, with 77% agreeing that people should be allowed to protest if they disagree with how the country is being run.

The stressed workers are less sure than other Tories about how they'd refer to their own political ideology (although in general people find this a difficult thing to do). They are less likely to think of themselves as right-wing than the Leave portion of the coalition, and they are the only part of the New Majority where 'moderate' pips 'conservative' as a descriptor. When positioning themselves on a scale from left to right, an outright majority (53%) place themselves in the centre.

Hostility to government

Looking more practically at economic questions, stressed workers are particularly brutal in their assessment of the Government's economic policy – but their hostility to government in general is similarly broad to the daily strugglers.

- 55% primarily blame the British government for rising costs, the top answer from the list of options we have;
- 55% say the Government could do more to ease the crisis but is choosing not to do so;
- 36% blame government tax rises (less than daily strugglers, but more than other parts of the Tory coalition);
- 26% say the Government has mostly done a bad job since it was elected, significantly less than the national average of 45% but the highest in the Conservative coalition;
- 50% say the Conservative Party mainly represents businesspeople and 49% say the Conservative Party mainly represents those on high incomes.

As we saw, the daily strugglers' anger was specific but also general; as well as cost of living, they were angry about immigration and the apparent failure of Brexit to deal with the problem. Stressed workers share many of the same characteristics: they're clearly disillusioned with the political system and the political process. But the fact that they're generally positive towards immigration, and were Remain voters/supporters, means they're not 'anti-politics' in the same way the daily strugglers are. If they leave the Tories, it won't be for a new version of UKIP. Their disillusionment also feels more focused on economics than the daily strugglers':

- By 55% to 45% they feel British institutions represent their interests poorly;
- 52% agree someone born 50 years ago will have a better life than someone born today;
- By 67% to 12% they agree 'ordinary working people do not get their fair share of the nation's wealth';
- By 64% to 6% they agree 'big business benefits owners at the expense of workers';
- By 64% to 15% they agree 'there is one law for the rich and one for the poor'.

Daily strugglers we spoke to in our focus groups showed little sympathy for the Government, voicing frustrations at their inability to cope with the cost of living crisis, and failure to adequately prepare for it:

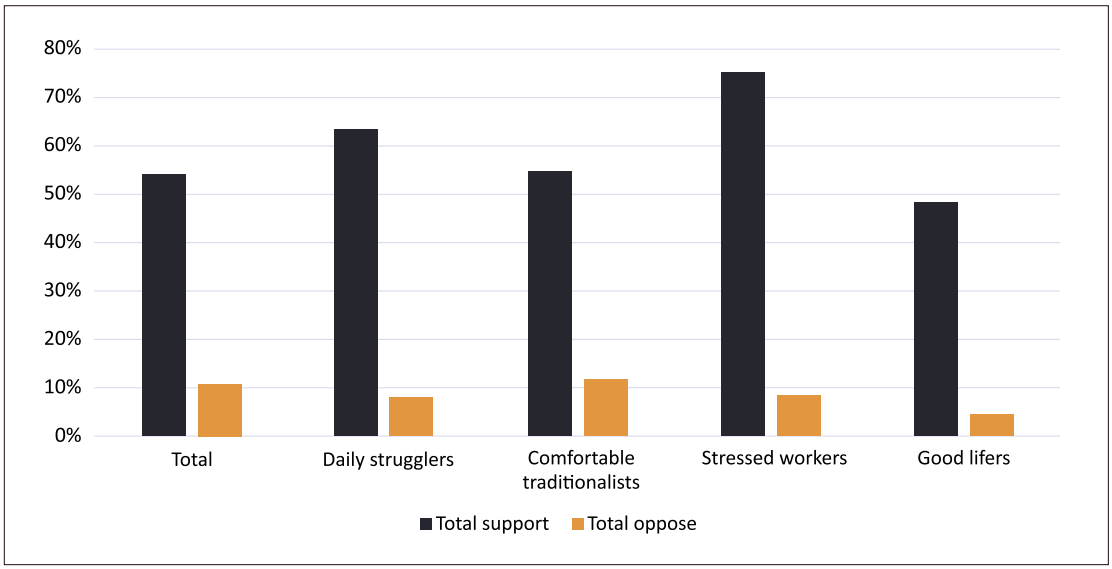
> 'The Government [is to blame for the cost of living crisis] in terms of not being prepared. So I think since Brexit everything's kind of got a bit out of hand. And there's been the blame game going on. A lack of preparedness within the UK is an issue, from local council to government.' (Middle-aged working-class woman, Greater Manchester).

> 'I think they [the Government] knew more than they let on and we're in this mess and I just don't think we've actually lived through it yet. Come October, November, December it's just gonna get worse and worse for people. And I think that's when they're going to have to take action. And that's when they will realise, it's all talk at the moment, they're just not doing much.' (Middle-aged working-class woman, Greater Manchester).

The economic policy they want to see

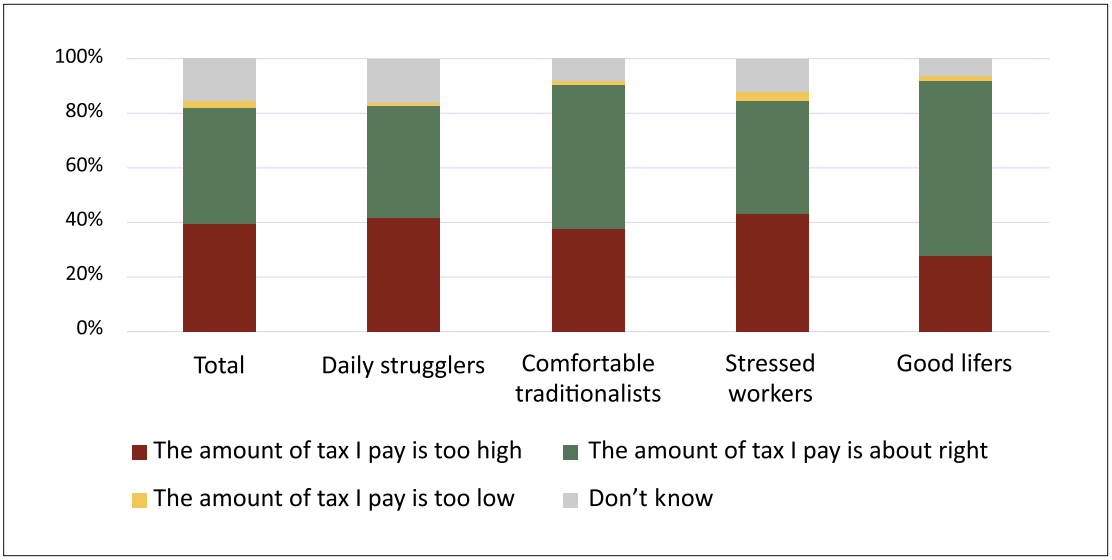
As we note above, as with daily strugglers, stressed workers prefer what might be described as a more populist approach to economic policy. They are much more likely to favour cutting taxes on lower paid workers and raising taxes on the higher paid and on bigger businesses. Some 69% want lower taxes on those earning less than £25,000 a year and 48% want lower taxes on small businesses (43% want them kept at the same level). However, 69% want higher taxes on those earning over £80,000 a year; and 44% want higher taxes on big businesses (with 36% saying they want them kept at the same level). Interestingly, by 47% to 26% they agree 'Government should redistribute income from the better off to those who are less well off'. Given a list of reasons to support lower taxes, they're most enthusiastic about reducing the amount of taxes business pay to encourage them to pay their workers more.

In general, would you support or oppose reducing the level of tax on businesses to encourage them to pay their employees more?



However, as with the other parts of the Conservative coalition, they are supportive of general low-tax messages. Across the coalition, they are the most likely to say that the amount of tax they pay is too high, with 43% saying this, compared to 42% saying it's about the right amount. By 70% to 10% they agree that if taxes are too high it will remove the incentive for people to work hard.

Which of the following comes closest to your view on the amount of tax you personally pay?



The importance of levelling up

As with daily strugglers, the levelling up concept resonates with our stressed workers. Many believe their towns have got much worse in recent years and most think their high street has got worse. This generally plays into their sense that life is very difficult at the moment.

- Asked directly what they think about levelling up, they support the concept but think the Government has done a bad job on it: 6% think it's a good idea implemented well; 45% think it's a good idea implemented poorly; 7% think it's a bad idea implemented well; and 16% think it's a bad idea implemented poorly;
- By 47% to 17%, they think their local areas have got worse in the last decade;
- By 69% to 13%, they think their local high streets have got worse in the last decade.

In our qualitative discussions with stressed workers, levelling up was brought up early and unprompted, with groups sharing a strong belief that it was the right policy for the government to do. Yet despite their support, they were also able to offer multiple examples of levelling up promises near where they lived which had not been delivered:

> *'It's a good idea. For example, when they brought the term levelling up, they were going to bring like Manchester closer to Leeds and Yorkshire and really improve the trains; and link great towns like Halifax and Huddersfield; make it all much quicker and accessible. And then I'm pretty sure they cut most of what they promised. So I wish they would actually make realistic policies and actually follow through with them. Levelling up just feels like another big word that the Government in Westminster don't know what it means because they're just so disconnected.' (Middle-aged middle-class man, Greater Manchester).*

> *'HS2 is a good example … as it's getting more and more expensive we'll shave a bit off here, shave a bit off there. I believe the part that was supposed to be going into the city centre of Manchester was supposed to be underground, but that's now costing too much so they are now looking at it going overground to save costs. It's just sort of 'hold on a minute, you've just put a cross link through London. And now we're [the north] losing bits' … it's a good example of how we're being promised things and it's not being delivered.' (Older middle-aged working-class man, Greater Manchester).*

Participants were even able to trace it back to its roots in previous Conservative administrations.

> *'It was started by Cameron and George Osborne, like the Northern Powerhouse, and I believed it and I felt it to be honest with you; I did believe that the money was going in that area. And then obviously, they resigned after Brexit, so it just kind of fell apart and got rebranded as you don't hear Northern Powerhouse anymore. So it's rebranded as kind of 'levelling up'. So it just sort of lost a bit of momentum there.' (Older middle-aged working-class man, Greater Manchester).*

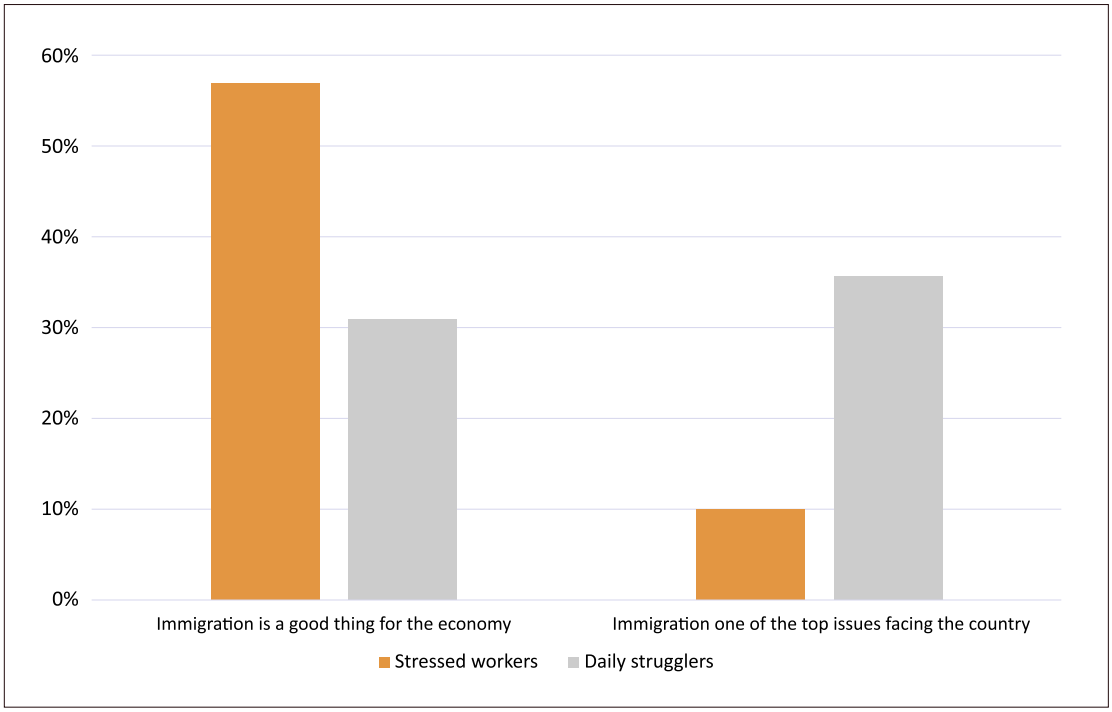
Immigration and the EU

Reflecting their Remain-voting status, stressed workers are more hostile to Boris Johnson: 27% say his exit makes them more likely to vote Conservative next time (compared to 12% of daily strugglers) and 78% say it was right that he resigned (higher even than the national average of 74%). They are far, far more likely than other

Conservative groups to blame leaving the EU for rising inflation and the most likely to say leaving the EU was a bad idea, poorly implemented.

Similarly, they're more relaxed about immigration. They agree by 57% to 43% that immigration is generally a good thing for the economy (compared to daily strugglers, who disagree by 69% to 31%). They are the group least likely to say they're concerned about immigration levels (10% named this one of the top issues facing the country, compared to 41% of comfortable traditionalists).

Views on immigration



Patriotism and culture

So far, stressed workers may seem in some respects to be closer to Labour voters than to traditional Tories. However, one reason that they are part of our New Majority is that they are far more likely than the national average to declare themselves proud to be British – agreeing by 78% to 7%, compared to the average of 67% to 12%. Asked how they think of themselves primarily, just over half say being British is the most important in how they identify, compared to the national average of 43%.

In short, while the Leave-voting segments are more likely to be assertively patriotic, this group of Conservatives is still more consciously patriotic than most.

On more cultural issues, stressed workers are much less small-c Conservative than others in the Tory coalition. They are much less likely than daily strugglers and comfortable traditionalists to say that for some crimes the death penalty is the most appropriate sentence (although 50% still agree); they are also less likely to support stiffer sentences more generally and less likely to say the law should always be obeyed even if it's wrong.

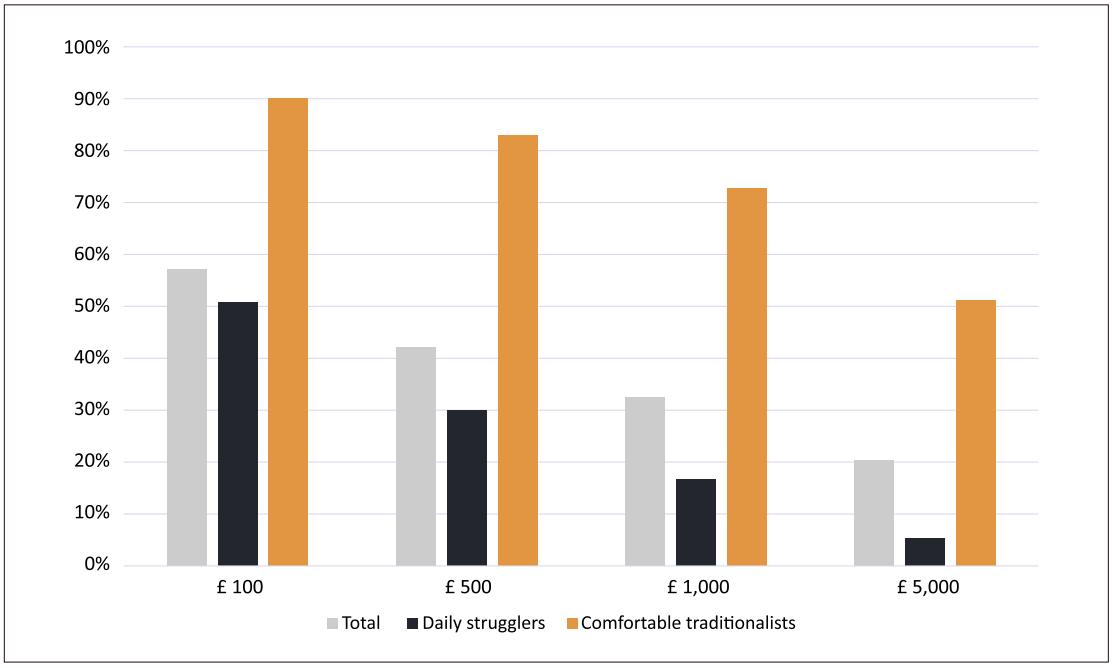
Chapter Four: The Comfortable Traditionalists

The lives of comfortable traditionalists

Making up a third of the Tory coalition, and nudging out the daily strugglers as the largest bloc of Tory supporters, this Leave-voting group are more middle-class and older, with nearly half of them retired. Almost all comfortable traditionalists own their own homes, and more than two-thirds own their homes outright. They're unlikely to be educated to university level, although most live in households led by white collar workers.

The comfortable traditionalists (and good lifers, their Remain-voting equivalents) are significantly less worried about the cost of living crisis because they're so much better off than others. It remains their top concern, but it's not in the same league as an issue as it is for those closer to the breadline: even if it's uncomfortable and worrying, they mostly know they can cope. Some 73% of comfortable traditionalists name the cost of living crisis as their top issue – high, obviously, but significantly lower than the 87% of daily strugglers who name this as their top issue. And if they had to pay an unexpected bill for £100, 90% say they wouldn't find it difficult at all. In fact, a majority say they could immediately settle a £5,000 bill without any difficulty.

'Not at all difficult' to pay an unexpected bill of...



Unsurprisingly, just 24% say they're very worried about inflation and rising costs, compared to 62% of daily strugglers. Only 57% say they're planning to cut down on heating and lighting their homes (although, to be fair, we know from prior research that this group is already quite careful about turning lights off, keeping heating levels sensible etc).

'We just live in our own little bubble really. It's quite weird because our income doesn't change because he's drawing a Rolls-Royce pension. We've got no aged parents we've got to look after, nor have we got any young children to worry about. So the biggest part of our life will be: should we put a jumper on instead of turning the heating off? You know, we've got enough petrol in the car to have a run up to [the picturesque Derbyshire town of] Matlock, in the middle of the week. So yeah, we're in a pretty different position to a lot of other people.' (Older middle-aged working-class woman, Derby).

Attitudes to the Conservative Party

Comfortable traditionalists are more positive towards the Conservative Party than most other groups. In fact, they're more positive about life generally, which affects things, but even so they are probably the most closely aligned with the Conservatives of all the groups within the coalition.

'Among comfortable traditionalists, 62% completely rule out a vote for Labour at the next election, more than rule out a vote for Reform UK'

Their own stated values are family, fairness, freedom and decency. The values they associate most closely with the Conservatives are tradition, patriotism, opportunity and ambition.

They think the Conservatives care most about businesspeople and those on high incomes, but to a lesser extent than the working-class groups. Homeowners and small business owners get more of a showing in this question, although they're still dwarfed by 'the rich'.

How they differ from Labour voters

Comfortable traditionalists are some of the most starkly different people to Labour voters. In fact, this group are the least like Labour voters across the Conservative coalition. No surprise then that 62% completely rule out a vote for Labour at the next election, more than rule out a vote for Reform UK.

The clearest difference between the comfortable traditionalists and Labour supporters, and probably the most important for the time being, is their level of concern for cost of living. Of those planning to vote Labour, 84% put this among their top issues, compared to 69% of comfortable traditionalists. This is partly unsurprising given the level of financial comfort this group enjoys relative to a typical Labour supporter.

Comfortable traditionalists are more than five times more likely to put 'levels of immigration' in their top issues than Labour supporters. Along with daily strugglers, they view immigration as generally a bad thing for the economy, while Labour voters (and the two Remain-voting blocs within the Conservative coalition) tend to view it as a good thing for the economy. Comfortable traditionalists value equality less than Labour supporters, and tradition considerably more.

Labour supporters and the rest of the Conservative coalition alike are completely divided on whether Governments interfere too much, or do not interfere enough; however, the comfortable traditionalists lean towards believing Governments interfere too much. Furthermore, being the only group in the coalition which leans against income redistribution, they clearly set themselves apart from Labour voters on this issue.

As with all of the Conservative 2019 coalition, they express more authoritarian views on a range of issues, but are distinct in wanting to keep very left-wing views out of the media. It is fair to say that, with a majority actively identifying themselves as 'right wing', the comfortable traditionalists tend to have a strong, self-defined political ideology.

Character and values

The comfortable traditionalists are ideologically the most stereotypical Conservative voters. They think of themselves as right-wing, they value freedom, family and hard work, and from a list of ideological terms they consider themselves 'conservative' first and foremost. Unlike the rest of the coalition, they tend to disagree with income redistribution – but even here a left-leaning outlook on the system permeates, with a sense workers are not getting their fair share.

As ever, 'family' tops the list of their preferred values, followed by 'fairness', 'freedom', 'decency' and 'hard work'. They're considerably below the nationally representative levels for concern about 'equality', at only 18% – falling behind typically lower-scoring values like 'stability', 'morality' and 'independence'. Along with the equally comfortable good lifers, comfortable traditionalists are more concerned about 'moderation' than the rest of the coalition, although this is still low at 10%.

'Comfortable traditionalists are ideologically the most stereotypical Conservative voters. They think of themselves as right-wing, they value freedom, family and hard work'

While half agree ordinary working people do not get their fair share of the nation's wealth, this is low among Tory voters (and voters more generally). They are unique, however, in their tendency to disagree that the Government should redistribute income from the better-off to those worse off. As we saw with daily strugglers, the pro-redistribution group within the comfortable traditionalists have become more sceptical of the Tories, with 18% now ruling out a Conservative vote compared to just 8% of those who do not favour redistribution. Even among these more comfortable respondents, then, there is a palpable frustration with Government inaction.

This group has a notable support and desire for authoritative systems. They're the most likely to agree that schools should teach children to obey authority, although this is a nationally popular view. They overwhelmingly favour stiffer sentences for those who break the law. As mentioned above, this group tends to favour keeping very left-wing opinions out of the media, but they're more divided on whether to do the same with very right-wing views media. They're also the least supportive among Tory voters of allowing people to protest if they disagree with how the country is being run, with 59% agreeing compared to 72% among the country at large.

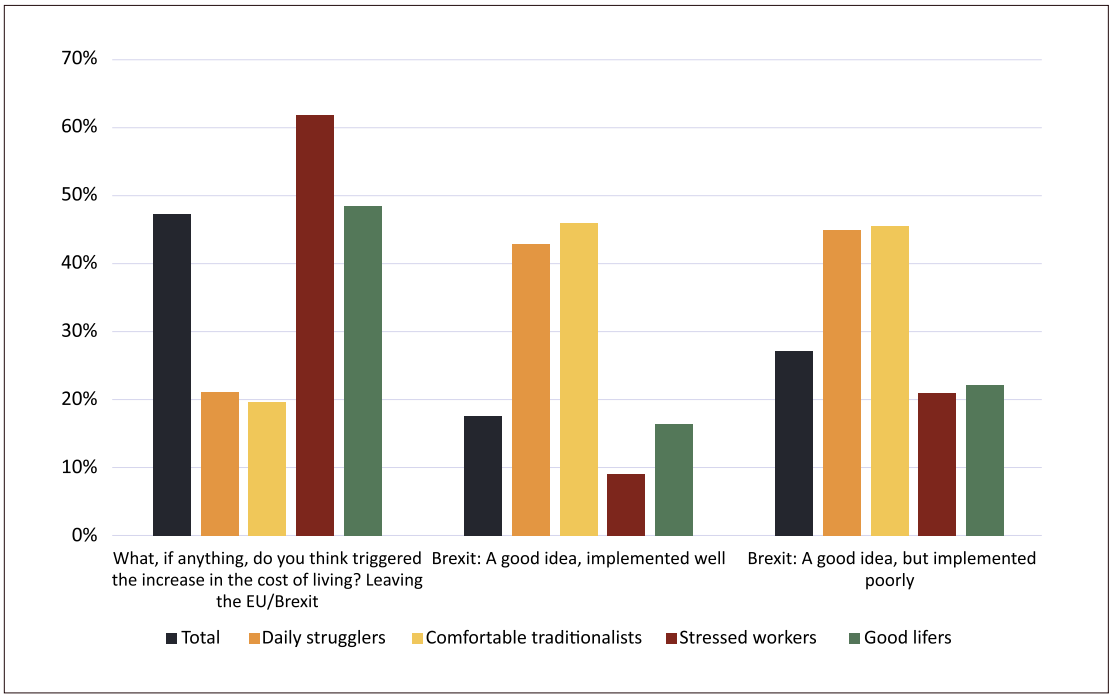
Their political interests

While these middle-class voters name the cost of living and the economy as their top issues, as we note above, they also feel the crisis much less: it's a serious concern for them, rather than an utterly terrifying and dominant issue as it is for those lower down the income scale. They are far more likely to care about immigration and the EU than other segments. They put immigration third on their list of top issues, way above the Remain-voting segments and significantly above the Leave-voting daily strugglers.

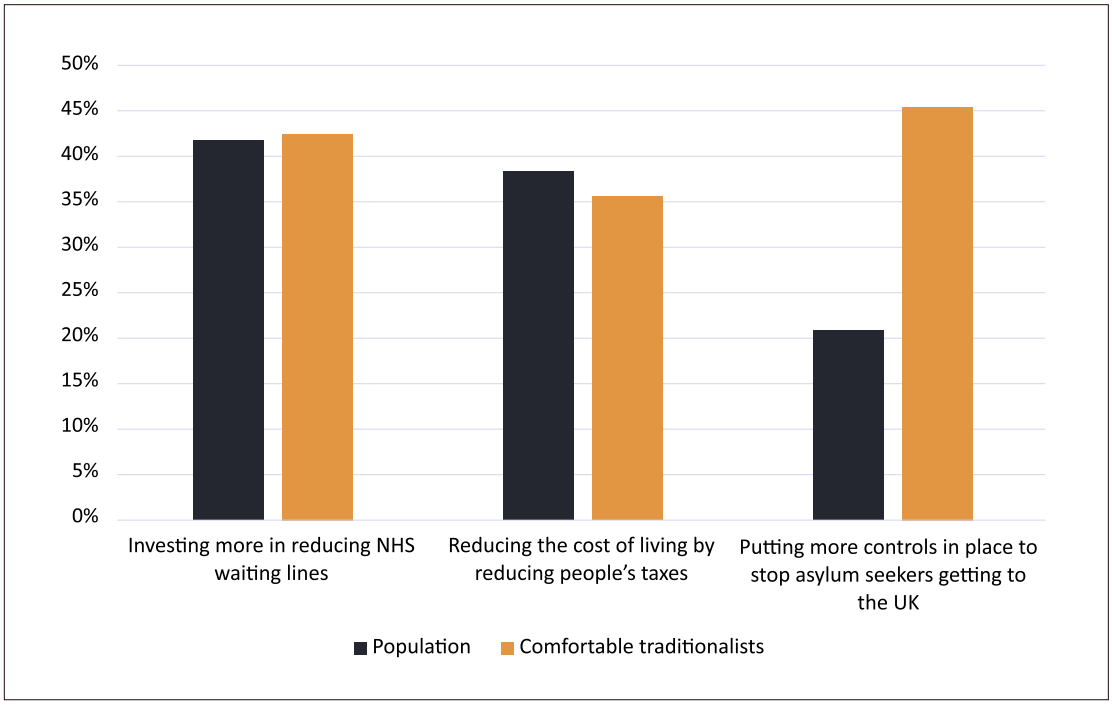
Elsewhere, these themes come through strongly:

- Given a long list of options of policies they might want in an election manifesto, their top answer was 'putting more controls in place to stop asylum seekers getting to the UK' (the highest number for any group within the Conservative coalition and way higher than the national average of 21%);
- 46% say Brexit was a good idea, well-implemented; another 45% say Brexit was a good idea, poorly implemented;
- By 63% to 37% they say immigration is generally bad for the economy;
- 31% say introducing an Australian-style points system was a good idea, well-implemented; 50% say it was a good idea, poorly implemented;
- 52% name illegal Channel crossings as an issue that receives a lot of attention that they're personally interested in (their top answer, and compared to a national average of just 26%);
- Just 19% say Brexit has contributed to inflationary pressures;
- Asked who they think the Labour Party cares most about, they name 'recent immigrants' third (behind 'welfare claimants' and 'people on low incomes').

Brexit views



Level of support for potential manifesto policies



Patriotism and culture

As we have seen above, most members of the Conservative coalition, regardless of whether they voted Leave or Remain, define themselves as patriotic towards Britain. It is one of the unifying forces within the coalition. That said, comfortable traditionalists are more self-consciously and more assertively patriotic:

- They're the most likely across the Tory coalition to say they strongly agree they're proud to be British; along with Leave-voting daily strugglers they're also most likely to say they strongly agree they're proud to be English;
- Like daily strugglers, they're much more likely to say Britain's history is mostly a source of pride;
- When asked what, from a range of characteristics, they consider most important to their identity, 56% say 'being British' (effectively tied with the good lifers);
- They are the most supportive of the Royal Family, opposing its abolition by 69% to 17%.

Attitudes to economic policy and tax

The working-class Conservatives we talked about above are seething with anger at their financial circumstances and prepared for what could amount to a radical shift in economic policy. They're clearly open to something that resembles classic populism, with taxes on big businesses and the rich matched with tax cuts for poorer workers and small businesses.

Comfortable traditionalists don't share this zeal. In fact, they're the only group that clearly disagrees with the statement 'Government should redistribute income from the better-off to those who are less well-off'.

However, there's more of an overlap on attitudes than you might expect:

- By 50% to 16%, they agree that ordinary working people don't get their fair share of the nation's wealth;
- By 57% to 12%, they agree that big business benefits owners at the expense of workers;
- By 56% to 20%, they agree that there's one law for the rich and another for the poor.

This perhaps reflects the fact they don't feel terribly over-taxed themselves, in turn perhaps because they're so relatively comfortably off. Over half say the level of tax they pay personally is about right, compared to 37% who say they are paying too much. Given a list of different groups who might be prioritised for tax cuts, 64% agree that taxes should be reduced for those earning less than £25,000 a year, and 58% agree taxes should be increased on those earning more than £80,000 a year:

'33% say their local town has got worse in the last decade (much lower than working-class voters' answer), and 62% say their local high street has got worse (somewhat lower than working-class voters)'

'I don't think cutting taxes is the answer because not everybody's a taxpayer. So that would only help the people that are actually paying tax: it wouldn't help the really low-paid, it wouldn't pay people who are long-term ill, or pensioners. I don't know what the answer is. But I fear that's not it.' (Older middle-aged working-class woman, Derby).

'A tax cut would be the wrong thing to do right now, because we wouldn't want to plunge deeper into debt. And we've got to build the economy back up some way or somehow; I don't know what would be the right answer just now just to make everything better for everybody.' (Middle-aged working-class woman, Derby).

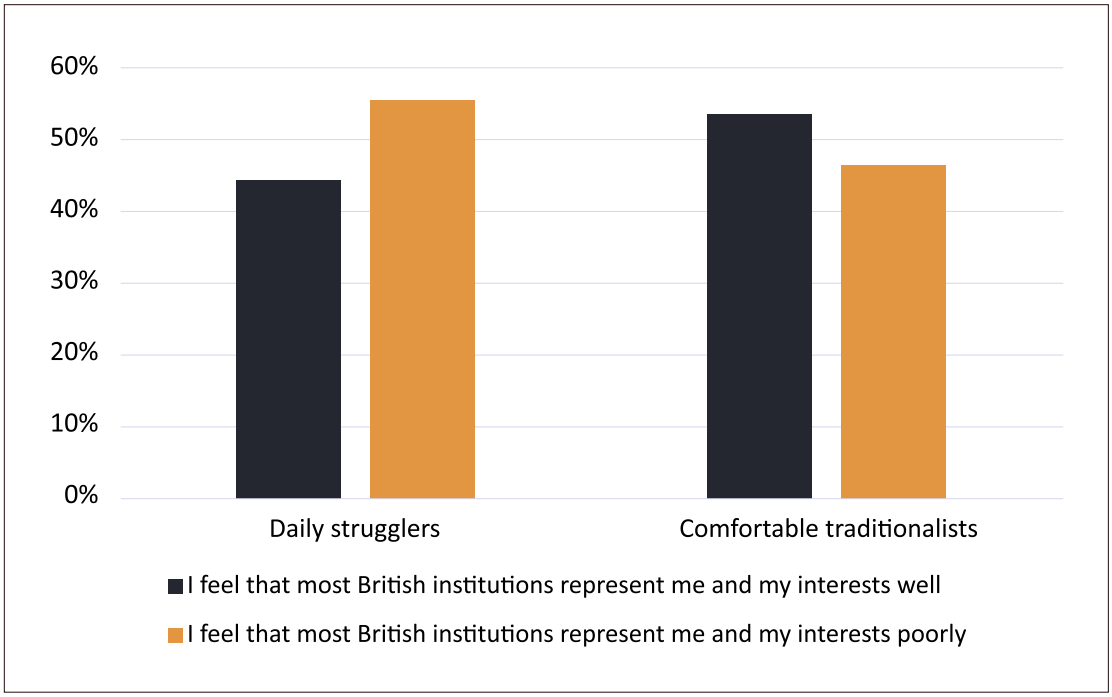
On levelling up, they're supportive of it in principle: 60% say levelling up is a good idea (although half of them think it's been implemented poorly). Given a range of messages pushing the prospective benefits of lower taxes, they're most enthused by the message which suggests lower taxes could boost local high streets. However, they clearly feel it much less: 33% say their local town has got worse in the last decade (much lower than working-class voters' answer), and 62% say their local high street has got worse (somewhat lower than working-class voters).

A lack of interest in 'anti-politics'

Given their commitment to what amounts to the established order, comfortable traditionalists understandably differ most from our working-class groups on their sympathy to what we're calling anti-politics (where they're closer to the middle-class, Remain-voting good lifers).

Perhaps most importantly, they agree, by some margin, with the message 'I feel that most British institutions represent me and my interests well'; 54% of comfortable traditionalists agree with this message, while 56% of daily strugglers disagree. They're less likely than working-class voters to agree their vote has no impact, and more likely to agree everyone's vote counts in the UK. They're more likely to say (although this is still a minority) that most politicians are involved in politics to serve.

Views on institutions



While they're less susceptible to these messages, we should also note they're not totally allergic to them either: it feels like they might accept the Conservatives taking on more of this sort of anti-establishment rhetoric, even if it didn't strike a chord with them personally.

Chapter Five: The Good Lifers

The lives of the good lifers

As the name suggests, the good lifers, around a fifth of the Tory coalition, are the most comfortable of all the groups within it. They are also the most classically middle-class: a majority are graduates; a majority are in full-time work, overwhelmingly as urban workers in the private sector; nearly two thirds own their own home outright; and a majority now work from home for at least some days of the week. They are Remain voters; most live in urban or suburban areas; and a fifth are between 18 and 34.

'While 73% of good lifers name the cost of living crisis as one of the most important issues facing the country, just 26% say they're very worried about inflation'

As with comfortable traditionalists, they are concerned about the cost of living crisis but know it will have a more severe impact on others. While 72% name the crisis as one of the most important issues facing the country, just 26% say they're very worried about inflation. (And that 72% is already significantly below working-class voters.)
There are a number of other markers which show how different their life experiences are to working-class voters' experiences:

- 44% say they wouldn't find it at all difficult to pay an unexpected bill for £5,000;
- 21% say they aren't planning to make any changes to their lifestyles or spending habits as a result of the cost of living crisis;
- While a majority say they're planning to consume less energy, they're still much less likely to say this than working-class groups;
- Of all the Conservative groups, they're most likely to work at home (48% say they do so on at least 'some days').

Our polling results were echoed in the qualitative research. While they were clearly very concerned about the cost of living crisis, good lifers are broadly aware that they are in a stronger position to withstand rising costs than most, and there was a quiet expectation (albeit not universal) that they would make it through:

> *'I'm aware that I'm in a privileged position because, I'm lucky I have a house, I have a job, my husband has a job and I'm in a privileged position and yet I'm scared and I'm struggling.' (Middle-aged middle-class woman, Esher).*

> *'I think we've had two years of being in a little bubble, surrounded and safe. And then we've come out of it and everything seems to be going a bit wrong at the moment. You've got rising costs, you've got war going off, you've got a political party that seems to be falling apart. And all of those things make me feel a little bit negative about job security and stuff like that.' (Older middle-aged middle-class man, Broxtowe).*

While some were undertaking lifestyle changes as a result of the cost of living crisis, these tended to be less drastic than other groups, such as eating out less:

> *'[Now because of the crisis] I'd rather buy stuff [at home] than go out and eat, which is a bit of a bad habit of mine.' (Middle-aged middle-class woman, Uxbridge).*

Attitudes to the Conservative Party

In the media, it's widely assumed that these affluent Remain-voters are the most wobbly of all Conservatives. This is where the concept of the 'Blue Wall' comes from: the idea there's a large group of middle-class Remainers in Southern seats who are so angry about the Brexit referendum and harder-edged policies on immigration that they're prepared to defect to the Lib Dems in great numbers.

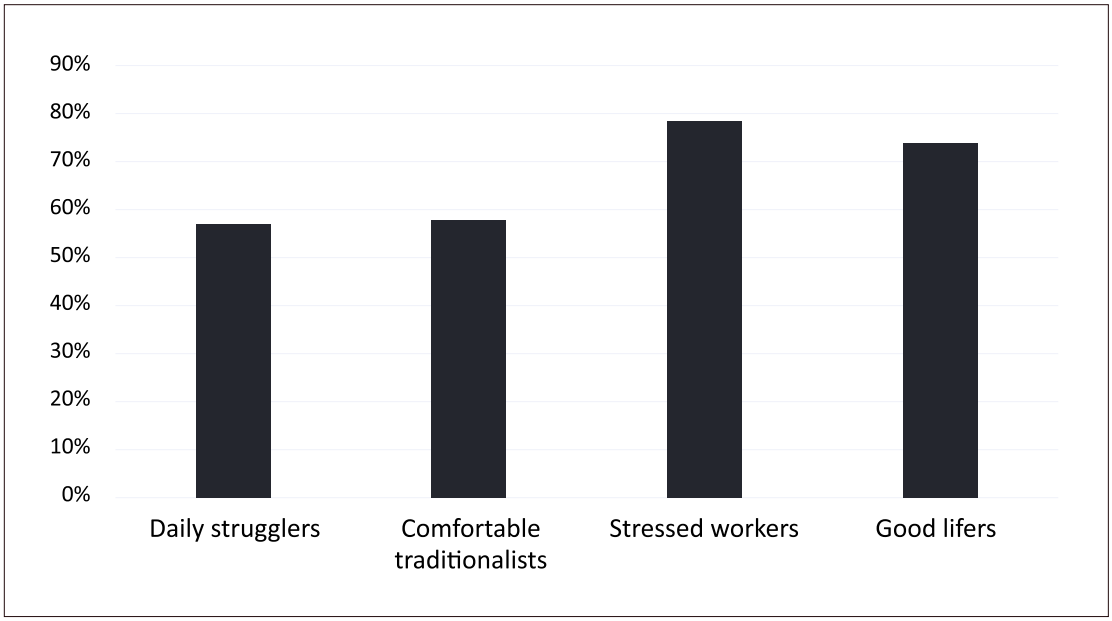
'Among our good lifers, 21% say they're planning to vote Lib Dem or considering it, which is the highest number in the coalition. However, 48% say they'd never vote Lib Dem or would be unlikely to'

There are clearly a significant number of Remain voters for whom this applies; and there are certainly some affluent Southern seats which look precarious for the Conservatives. Among our good lifers, 21% say they're planning to vote Lib Dem or considering it, which is the highest number in the coalition. However, 48% say they'd never vote Lib Dem or be unlikely to.

Indeed, compared to the less-affluent Leave voters we looked at, this group doesn't actually seem terribly wobbly. Only 5% say they'd definitely not vote Conservative, compared to 14% of daily strugglers. Another 9% say they'd be unlikely to vote Conservative, compared to 11% of daily strugglers. Even though they voted Remain, this group as a whole appear strongly committed to the Party and don't look likely to be leaving the centre-right coalition any time soon. In addition:

- 26% say Boris Johnson's resignation has made them more likely to vote Conservative next time, effectively tied with the stressed workers; and a similar number agree with the stressed workers that Boris Johnson was right to resign (74%);
- Asked about their own values, those dearest to them are family, fairness, hard work and decency (which have typically been the most popular for lower middle-class voters); they associate the Conservatives with tradition, patriotism, entrepreneurship and opportunity;
- They also think the Conservative Party cares most about people on high incomes and businesspeople, followed (some way down) by people on middle incomes and home-owners.

Agree that Boris Johnson should have resigned



In short, while Boris Johnson's exit has made it more likely they will stay as Conservative voters, their fundamental beliefs, their character and their values strongly suggest that they'd made their peace with the party before his exit. Indeed, many of our focus group discussions took place in the months preceding Johnson's removal as Prime Minister, when public anger over the partygate scandal was at its highest, but there was no sense of a looming mass defection to the Liberal Democrats or another political rival:

> *'They [the other political parties] just witch-hunt the Conservatives, Boris basically, and they don't put forward anything else, no vision, no strategy. They just slate the opposition and don't do anything else in my eyes. That's all I ever see.' (Middle-aged middle-class woman, Broxtowe).*

> *'I don't know who the Liberal Democratic leader is, whereas I used to know who the Liberal Democrat leader was, because they're not visual enough. They're not on telly enough. They're not having an opinion.' (Older middle-aged middle-class man, Broxtowe).*

Even those who strongly criticised the Conservatives early in our conversations were not ruling out a vote for the party at the next election:

> *'I think with everything that has happened in the past couple of years, it's highlighted some of the flaws of the party and the sort of seedy underbelly of it in ways that are quite hard to come back from, but I'm not so steadfast in saying that I wouldn't vote next time for them, sometimes it's better the devil you know.' (Middle-aged middle-class man, Esher).*

How they differ from Labour voters

The good lifers, like the comfortable traditionalists, express less concern than Labour supporters about cost of living, with 26% saying they're very worried, fewer than half of the 61% of Labour supporters. They're the most likely to feel the Government is capable of reducing the cost of living and is taking action to do so, with over a quarter saying so compared to just 16% of Labour supporters. The good lifers are also the only group in the Tory coalition who are more likely than Labour supporters to put climate change among their top issues. Along with the stressed workers, they align more with Labour than Leave-voting Conservatives in their level of concern about immigration.

'Overall, 66% feel that most British institutions represent them and their interests well, compared to 36% among Labour supporters'

The good lifers differ substantially from Labour supporters in how represented they feel, and how fair they perceive society to be. Overall, 66% feel that most British institutions represent them and their interests well, compared to 36% among Labour supporters. In fact, the comfortable traditionalists have a general trust for institutions. They are the most likely among the Tory coalition to disagree that 'there is one law for the rich and one for the poor', with only 44% agreeing (compared to 70% agreement nationwide). Only a third agree they feel like their vote has never had an impact compared to around half of Labour supporters, and only 6% disagree that everyone's vote in the UK counts compared to almost a quarter of Labour supporters.

Their character and values

The good lifers generally tend to express more contentment with the status quo. They consider themselves right-wing, but a good portion describe themselves as liberal (perhaps because they mean this in the classic English sense rather than as a US-style synonym for left-wing). They are, however, on the left of the Tory coalition, something which stands out in their choice of key values. 'Family' still tops the list, followed by 'fairness', 'decency' and 'hard work'; but 'freedom' only barely scrapes into the top five.

Just shy of half the good lifers agree ordinary working people do not get their fair share, which is sharply lower than the general public. They slightly agree – 35% to 31% – with the redistribution of income. The effects of this on their voting intentions are less severe, with only 7% of those who support redistribution ruling out a Conservative vote compared to 2% who disagree. We might read this as an indication that this view is less urgent for them; it is possibly more ideologically held than from a position of concern for their own finances. They're slightly more positive than the rest of the coalition on the private sector, with a clearer majority believing businesses are better at solving problems than the public sector. Just under half agree management will always try to get the better of employees, which again is on the low side.

The good lifers are the least likely to feel young people don't have enough respect for traditional British values. While agreeing people who break the law should be given stiffer sentences, they're more in line with the general public than the rest of the Conservative coalition on this. They tend to be the most in favour of media censorship, but their preference is for both very left-wing and very right-wing views to be kept out of the media. Similarly, 31% agree that TV shows made in the past should be censored if they are offensive, more than agree at a nationally representative level (although the overall tendency, among good lifers as among the public, is to disagree with this).

More than others in the coalition they consider themselves 'democratic', though still 'conservative' and 'moderate' first and foremost. Some 14% think of themselves as 'centrist', and 14% as 'liberal', setting them apart from others in the Tory coalition. They are more likely to consider the rest of the UK public to be 'democratic'. Only 50% consider themselves to be to the right of centre.

'Some 14% think of themselves as 'centrist', and 14% as 'liberal', setting them apart from others in the Tory coalition'

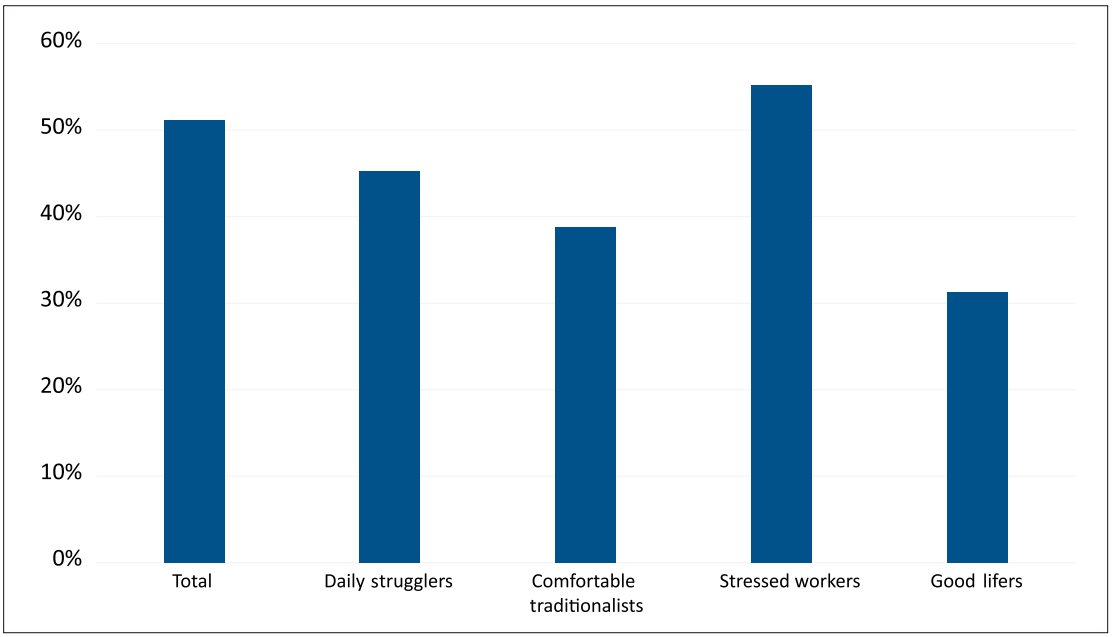
One of the most obvious areas where they differ from Tory Leave voters is on attitudes to immigration. As Remain voters they think leaving the EU was a bad idea and they're far more likely than Leavers to blame Brexit for rising costs (although much less than the stressed workers are). They're the most likely to say immigration is generally good for the economy, with 64% saying it is a good thing. And they're much less likely to say they're concerned about illegal Channel crossings.

Attitudes to economic policy

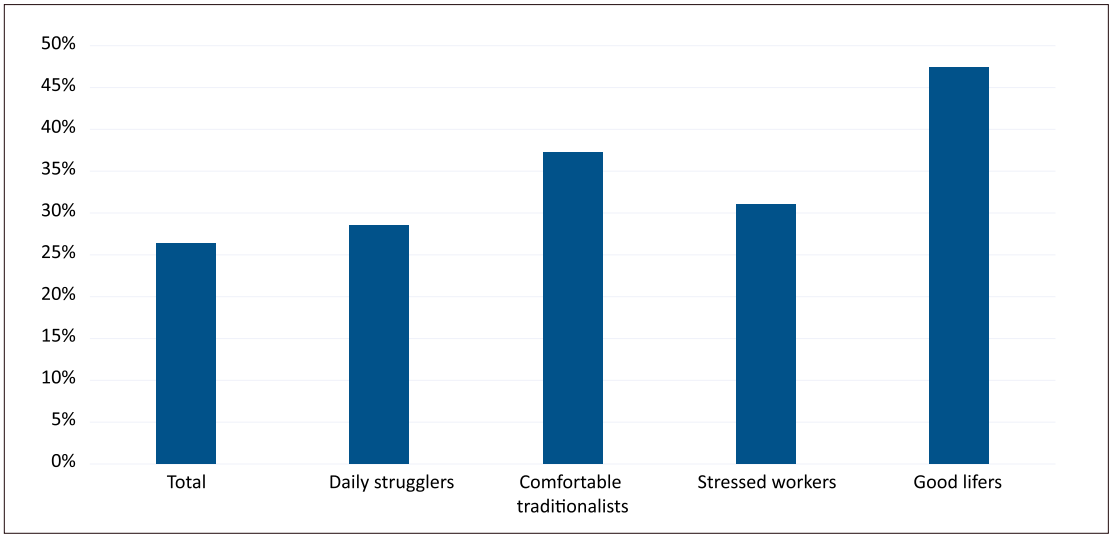
Good lifers take a pretty middle-of-the-road attitude to economic policy. They basically seem want the status quo on the economy, rather than any great rebalancing, and are supportive of the Government's recent approach. They accept the case for some tax rises, but are nervous about anything radical.

- They're the least likely in the Tory coalition to say the Government can do something to help alleviate the cost of living crisis but is choosing not to;
- They're the most likely in the coalition to say raising NICs was a good idea;
- They're the least likely to say taxes should be cut for those paid under £25,000, although 57% say they should be reduced at least somewhat for this group;
- They're the least likely to say taxes should be raised for those paid over £80,000, although 58% say they should be raised somewhat for this group;
- By 41% to 10%, they think taxes should be raised on big businesses (with the remainder saying they should be kept the same);
- More good lifers than not agree with the following statements: ordinary working people don't get their fair share of the nation's wealth; big business benefits owners at the expense of workers; Government should redistribute income from the better-off to those who are less well-off; there is one law for the rich and one for the poor.

Agree that the Government is capable of reducing the cost of living, but is NOT taking action to do so



Believe raising NICs was a good idea



In our focus group discussions with good lifers, there was little consensus on what the Government should do on tax. Again, a belief in fairness shone through, and they were keen to highlight the importance of everyone paying their fair share, condemning those at both ends that played the system:

> *'Go hard on the corporate tax evaders, all those convoluted ways of proofing themselves against what they should be paying. And maybe tax the wealthy more fairly.' (Middle-aged middle-class man, Esher).*

> *'It would be a better message to say, look, everybody's going to pay their fair share of tax, and that includes corporation tax on these international businesses etc … I think people acknowledge that there is a cost to what people want to provide in society, a cost of looking after people. I think there's more of a question about, do we get that value for money out of that taxation, rather than we shouldn't pay as much tax.' (Older middle-class man, Pudsey).*

While they were instinctively pro cutting taxes, good lifers agonised over the dangers of increasing public debt:

> *'In a perfect world, they [taxes] should be cut. But how can they possibly at this moment in time, when there's billions and billions to pay back? It has to be paid back at some point. And it's bad now, but what will it be like in five years' time or ten years' time? … Otherwise, you have no services and we're in so much debt. You can't carry on racking up debt forever and ever.' (Older middle-class woman, Pudsey).*

Their fear of radical change also made them more sceptical of opposing political parties. Labour in particular were viewed with a significant level of suspicion:

> *'I am a little bit 'better the devil you know', unless Labour come up with some really good ideas, on practically how they could really do some difference. I don't think I'd take the risk. I'm not saying that they'd be any better or worse, it's just more of a comfort, I suppose, just feeling comfortable with it. I'd rather things go slow and steady than some radical changes promised.' (Middle-aged middle-class woman, Uxbridge).*

We can see the same on their attitudes to the size and role of the state:

- They're the most likely by far to say British institutions represent them well;
- They're the most likely in the coalition to say the NHS works well;
- They're the least likely to say governments interfere too much;
- They're the most likely to say governments can help them personally;

While good lifers are the only group who are more likely to say their local areas have improved in the last decade (by 35% to 23%), although not their high street, they're also the most likely to say the levelling up strategy was a good idea, well implemented, and are generally very supportive of it.

'As Remain voters they think leaving the EU was a bad idea and they're far more likely than Leavers to blame Brexit for rising costs'

Given a list of possible reasons to support lower taxes, they're most supportive of the message that stresses the impact on small businesses in local communities. This was strongly felt in our groups, where people lamented the decline of their high street and believed support for small businesses was the answer:

> *'They're spending money on other things rather than reinvesting in small businesses, tax reliefs, cutting corporation tax… We need to bring it back on home soil; this is our little island and there's [currently] not much export.' (Middle-aged middle-class man, Esher).*

Attitudes to patriotism and culture

Good lifers don't have the same assertive patriotism as Leave-voting groups, but as with all of our Tory groups, they're still very patriotic. They're the most likely to say they identify as being British (and the least likely to say they identify as being English, or Scottish or Welsh); they're among the most likely to agree they're proud to be British; and they're more likely rather than less likely to say British history is generally a source of pride. They also oppose the abolition of the monarchy by 61% to 26%.

'Good lifers don't have the same assertive patriotism as Leave-voting groups, but as with all of our Tory groups, they're still very patriotic'

There's a similar story on broader cultural issues: good lifers might be on the left of the Tory coalition, but they are 'small-c' conservative on most key signifiers. For example, they believe in tougher sentences on crime, but less so than other parts of the coalition; they agree that for some crimes the death penalty is the most appropriate sentence, but less so than the Tory Leavers.

Chapter Six: Towards a New Majority

In the previous chapters, we have examined the groups that make up the British centre-right. That coalition is creaking under the strain of the cost of living crisis – but there are enough common interests and values between the different groups to keep them all together.

The question is: how can that best be done? How can the Conservative Party best appeal to and retain its voting coalition? And how can groups such as the Centre for Policy Studies, which champion policies rooted in a free-market philosophy, best persuade the voters of their virtues?

The most obvious point to make here is that you have dance with the one who brought you.

Before Brexit, there was a viable strategy for the centre-right that focused on more affluent, more cosmopolitan, younger, urban voters. These were the Conservatives' core supporters in the early Cameron era. Given their relative affluence and their youth, they responded to policies on things like childcare, early years support, and improved public transport – things that make a real difference to middle-class families' lives. Being better off, they also responded to more liberal policies on crime, justice and immigration.

> **'Before Brexit, there was a viable strategy for the centre-right that focused on more affluent, more cosmopolitan, younger, urban voters'**

In 2010, the Conservatives nearly secured a majority off the back of this approach, despite a frankly terrible election campaign. Although the party moved slightly to the right between 2010 and 2015, it still won a narrow and unexpected majority in 2015. Some strategists have argued the demographic future of the UK – younger, more professional, more urban, more multicultural – means a shift in this direction is not only desirable but in the longer term inevitable.

But the Leave vote in 2016, and the long years of argument that followed, have changed the terms of trade. This isn't to imply the future depends on continually refighting the Brexit wars. For most working-class Leave voters, Brexit was a one-off; it's now done, and we move on.

But the great post-Brexit reboot has left the Conservatives with a group of poorer working-class voters who feel essentially positive towards them (for now), and a large group of more affluent, Remain voters who won't be going back to the Tories any time soon. The current leadership contest has only confirmed the extent of that transformation.

In the author's view, there is no credible alternative for the Conservative Party, and the broader centre-right, in protecting and promoting a New Majority than giving particular attention to working-class Conservatives – while ensuring that they also deliver enough for the rest of the coalition to keep it together.

Let's look at what this means.

‘On your side’

The words ‘on your side’ should guide everything the centre-right does in the next few years, demonstrating the movement is on the side of working-class voters. It’s a theme that should drive policy design and analysis, policy implementation and the communications around it all. This should not be an abstract theme, but something built into the movement’s philosophy and operations.

> **‘The cost of living crisis is a moment of awful danger for the Conservative Party. But it also gives them the chance to make a pivot to working-class voters real’**

At every point, the Conservatives should make sure their decisions put them on the side of hard-pressed families. Constantly, they should ask: how do we make life fairer and better for those who struggle? Furthermore, this should be how they present their policies and project their reputation/brand for the foreseeable future.

Every now and again, Conservative leaders dabble with this idea – usually when they’ve been influenced by a successful American candidate or consultant. But when they talk about things like ‘the British Dream’, or ‘looking after the little guy’, it always sounds temporary and gimmicky, not least because they usually move on to something else in short order.

In the cost of living crisis is a moment of awful danger for the Conservative Party. But it also gives them the chance to make such a pivot real. They can and should focus their political and financial attention on struggling workers – on helping them through this financial crisis, but also looking to improve their lives more generally.

Immediate and urgent: protect the working class on cost of living

The voters who are wobbliest about the Conservatives are those most affected by the cost of living crisis. At present, many less affluent Conservatives don’t believe the Government is taking the crisis seriously and many believe the Government could be doing more but is choosing not to. The first priority therefore must be to talk about the cost of living far more than leading politicians currently are.

This sounds trivial; it isn’t. The real surge in living costs began at the point the Conservative parliamentary party began to move in earnest against Boris Johnson. As the leadership campaigns developed, they frequently dwelt on issues that appealed to party members but left the general public cold, such as gender identity and free speech. While tax played an increasingly important role in the debate, it can’t be credibly claimed the candidates gave the cost of living crisis the attention it deserved, at least in the early weeks. More recently, the country has been holding its breath to see what the new Prime Minister will do, in an atmosphere of increasing impatience and uncertainty.

As we all know, the cost of living crisis is a national issue that worries the vast majority of people. However, as our research shows, it doesn’t worry everyone in the same way: our daily strugglers and stressed workers are far more alarmed than the comfortable traditionalists or good lifers.

This might change over time as more and more people are forced to make financial sacrifices, but at the moment this is a genuine crisis primarily for the least affluent.

From walking into No 10, the new Prime Minister must therefore totally obsess about the crisis. In the short term at least, any time spent talking about things other than the cost of living is wasted. They need to show less affluent voters that they understand their lives, care deeply about their predicament, and articulate a plan to make things better.

Patriotism and fairness: values that show we're 'on your side'

Policies and execution matter most, but framing and communications matter too – and this puts an emphasis on the power of projecting the right values. Working-class voters need to understand the motives of the Government to appreciate the changes it is making.

As I have described here in detail, patriotism and fairness are the values that should define the centre-right in the coming years. Alongside family, these are the values that best enable the centre-right to show it's 'on your side'. Other values across the coalition are important – hard work, freedom, tradition – but it's these that come through most strongly across the research as a whole. They are also the values that can be applied simply and most consistently by the centre-right – and, crucially, they can be applied without alienating other parts of the coalition. Patriotism, fairness and family help tie the New Majority together.

I began this analysis by noting British patriotism was the glue that binds the Conservative coalition together more than almost any other value. Not the assertive patriotism a minority of Leave voters often project, but the quiet pride in Britain and its history that is much, much more likely to be felt among Conservative voters than voters from other parties. This ought to be a defining theme of the Party in the years ahead.

> **'Jeremy Corbyn appeared to pose a direct threat to Britishness and this unquestionably boosted the Conservative vote in 2019'**

Jeremy Corbyn appeared to pose a direct threat to Britishness and this unquestionably boosted the Conservative vote in 2019. But, in various forms, this will remain the case in coming years. Not a week goes by without a high-profile story of a Labour council, or a Labour MP or activist criticising some aspect of British history or a revered historical figure. The media amplifies such rows massively. Most of the culture war passes the public by (see below), but not things related to patriotism, national identity and history; in focus groups, it's guaranteed to light up discussions.

The Conservatives should therefore articulate a low-key but steady British patriotism which is self-consciously inclusive but which also makes clear that we're not going to run away from our history.

On fairness, I realise this can sound blatantly obvious – that of course people want and expect fairness. It is a particularly English working-class obsession. But it's not a word that comes naturally to Conservative politicians; they often seem to put it in the same camp as 'equality' – a word that they can only borrow from their Labour counterparts.

This fear is misplaced; in fact, the vast numbers of working-class people who have come over to the Conservatives in recent times have come over because they think the Conservatives offer a fairer approach to economic and social issues.

Many working-class voters began to shift to the Conservatives in the early 2000s because they thought Labour were taxing them excessively, barely improving public services in the process. Many more came over in the late 2000s because they thought

the Conservatives offered fairer policies on welfare to work. Emphatically, the word fairness is a word the Conservatives can fight Labour for ownership of – at least on the issues that matter. Fairness is about looking after the interests of people who work hard and who respect the rules and convention.

Given a list of values that are most important to them personally, fairness comes very high up the list: second for stressed workers and third for daily strugglers. But given a list of values that they think political leaders should have, and fairness comes top for both working-class groups.

What does this mean in practice? It means a tax system seen to disproportionately help those that need it most. It means ensuring that the wealthiest and big businesses aren't seen to exploit the existing system to avoid paying their fair share. It means ensuring that the law is applied firmly and fairly when it's broken, regardless of who breaks it.

'Emphatically, the word fairness is a word the Conservatives can fight Labour for ownership of – at least on the issues that matter'

Thinking more about big businesses, instilling fairness could mean actively intervening in the economy to tip the balance in favour of small businesses and start-ups who want to challenge giant competitors. It could mean taking action to stop failing businesses paying out large salaries and dividends to senior staff and shareholders when there isn't sufficient money to pay them. It could mean changing procurement practices so smaller businesses have a better chance to compete.

But for less affluent voters, this isn't just about fairness 'at the top'. Many are exasperated at a welfare system that rewards those they think don't deserve it. After the financial crisis in 2008, while politicians were hammering 'bankers', in focus groups working-class voters were getting more and more angry about welfare claimants who they thought were milking the system. This appeared primarily to be because they lived among such people. On the other hand, they never came across bankers or indeed the very rich; how could they?

During the Covid crisis, there was a general softening of working-class attitudes towards welfare claimants; there was rightly a strong sense people were struggling though no fault of their own. While attitudes appeared to harden when people drifted back to work, you generally don't get the same anger towards some welfare claimants that you did a decade ago. That said, the cost of living crisis may push things in either direction. It's possible that people will again think that welfare claimants are struggling badly and need particular help; however, it might be that they think that, while they themselves are working hard to keep their heads above water, others are just sitting around waiting for their welfare payments to be increased (again, unfair as that might be). To be clear, this only applies to people working-class voters 'know' could work but aren't, rather than those who are genuinely incapable (primarily the disabled). Either way, Government politicians will need to ensure the system is fair at both ends of the scale.

Finally, a quick mention of family. This is more of a universal attribute than a particularly Tory idea: everyone cares about their families and sees their own prosperity through the prism of the family unit. This, indeed, is where the Tories should focus on this front. Voters do not want a broad moral crusade on the family. They want to feel that government cares about their families and is doing what it can to support them. This obviously ties in extremely closely with its attitude to cost of living.

Riding the wave of anti-politics

Along with fairness, there's another decisive theme for working-class voters which matters as they show they're 'on your side': anti-politics/anti-establishment sentiment, which is an adjacent sentiment to 'fairness'.

To some extent, this is a harmful by-product of perceived political failure; ideally, it shouldn't exist at all, and competent government ought to reduce it. The truth is, however, that it's been a feature of less affluent working-class voters' political thinking for many years now – at least since the early 2000s, and probably since the mid-to-late 1990s. It isn't going anywhere. The Leave campaign tapped into this sentiment in a big way in 2016. Boris Johnson did (again under Dominic Cummings's influence) in 2019. The Conservatives should remain alert to its danger and to its potential.

'The point can and should be made that politicians don't have all the answers – all the skills and experience – to run everything and decisions should be devolved to those that can make them better'

There are several areas relevant to its application. Most obviously, it has a direct relevance to how the Government talks about the reform of capitalism and the better regulation of big business. It can also be applied in discussions on policies related to tax and spend and public service reform. The point can and should be made that politicians don't have all the answers – all the skills and experience – to run everything and decisions should be devolved to those that can make them better.

The language of business

This takes us onto the next theme: reforming capitalism for ordinary families to show the party and movement are 'on your side'.

There are obviously many things the new Government can and should do to help the economy. But it is clear that agenda which focuses exclusively or primarily on big business – or gives the impression of doing so – will be unpopular not just with the public as a whole, but with all of the four voting blocs we analysed above.

Inevitably, this is one of the most controversial areas for any Conservative Government. What to some seems like sensible regulation of big businesses is for others unacceptable and counter-productive interference in the free market. In the leadership campaign, Liz Truss brushed aside the prospect of a windfall tax on some of the largest energy firms, who have made astronomical sums as energy prices have surged after the Russian invasion. Profit, she said, shouldn't be a dirty word.

From an economic point of view, she was dead right: windfall taxes are an awful idea. The problem is that they are also, when it comes to the oil and gas companies, an extraordinarily popular one.

In the couple of years following the Brexit referendum, the reputation of big business rocketed as people started to worry big firms were going to leave the UK and take investment and jobs with them. For the first time in many years, people saw them as 'big employers' rather than 'big businesses'. But this feeling waned over time, particularly during the Covid crisis when there developed a sense that the big firms had done fine while others had struggled.

With the cost of living crisis, the reputation of big business has crumbled. There is a general sense of profiteering – that some businesses are using national inflation figures

to raise prices, regardless of the pressures on their own firms' finances. This is not confined to the energy giants, but is most acutely felt where energy firms are concerned – which in turn has been exacerbated by brutal media coverage over firms like profits and senior executive salaries.

Again, this perception may not be justified – but it is hard to see it changing any time soon. People simply think some big firms, particularly big energy firms, have got lucky amid everyone else's misfortune thanks to the Russian invasion of Ukraine; they will never, ever be convinced that their profits have in any way been 'earned'.

So what to do about this? Obviously, the Conservatives cannot stop being pro-growth and pro-business. A lack of growth is, as the Centre for Policy Studies has argued ad nauseam, the biggest long-term problem the country faces.

> **'The Government must help working-class voters any way it can. This might be through tax cuts, but might be through significant direct subsidies'**

But on corporation tax, for example, the bulk of the public don't pay corporation tax and don't really know what it is or how it works. They think it's for 'big corporations' and don't realise it's a tax that's most problematic for smaller businesses who lack the ability to offset it (via aggressive hiring plans, training courses for staff, new equipment, and so on). Any announcement on corporation tax would need to be endorsed by the likes of the Federation of Small Businesses – and articulated through the prism of helping smaller businesses.

More broadly, there is a language in this space that isn't about 'bashing big business', but about ensuring the biggest businesses are run in the same way the best small businesses are run: preventing senior execs from paying themselves vast salaries and dividends the company cannot afford; preventing them from dipping into pension funds and savings that would affect the long-term viability of companies and payments to staff; holding some utility companies to account more aggressively; ensuring public tenders don't keep going to the same old firms; and so on. This is a perfectly reasonable, highly conservative, in fact highly free-market, approach to the economy which suggests the Government should step in to ensure the free market is more competitive and delivers for ordinary people.

Such an approach would be a 'consumer first' approach to the economy and to the management of capitalism. If it's interventionist, it's interventionist with ordinary people in mind. It's also the opposite of what conservatives are supposed to detest: cosy corporatism.

Such an approach would clearly take some explaining; ultimately, it's quite a hard sell publicly as it's inherently quite abstract. However, it would give the party the opportunity to show it was standing up for hard-pressed families and small businesses against useless and complacent big businesses.

The role of tax cuts

The Government must help working-class voters any way it can. This might be through tax cuts, but might be through significant direct subsidies. Regardless, at some point – as quickly as it can – it should begin to reduce the tax burden generally, beginning with the lowest paid, but moving to other groups.

There was something of a mismatch in polling and focus groups on tax: in the groups, most people said they felt taxes were too high and should be cut; in polls (for the CPS and others), they're as likely to say they're taxed fairly as unfairly.

Our very strong sense is that most people think their taxes are now at the highest point they can and should reasonably accept, and that they need to start coming down. Politically, a reduction in taxes is one of the best ways to keep the Conservative coalition together. It played a bigger part in the development of the coalition than many accept or realise; in focus groups between 2018 and 2019, when the prospect of a Corbyn Government was being discussed, many potential Conservative voters talked openly about their fears of a high-tax, high-spend Labour government. They were convinced that this would lead to them being clobbered by massive taxes.

Tax cuts have of course played a defining role in the leadership campaign. Liz Truss said she would repeal Rishi Sunak's planned increases in NICs and corporation tax, while Sunak warned this could have a negative impact on inflation. In the contest, members were clearly more convinced by Truss than Sunak – which may be why he then started promising sweeping income tax cuts down the line.

'There is a huge appetite among Tory voters – and the wider public – for solutions to the cost of living. And there is strong in-principle agreement, especially among the blocs we have examined, that tax cuts are part of that'

Public attitudes towards tax cuts are complex. If pushed, most people usually say they prefer stability to tax cuts. It's clear a significant number don't feel particularly over-taxed personally. On the face of it, therefore, Sunak's pledge to tackle inflation first and only then deliver tax cuts appears closer to public opinion.

But while there is limited appetite even among Conservative voters for tax cuts on a point of economic principle, there is a huge appetite among Tory voters – and the wider public – for solutions to the cost of living. And there is strong in-principle agreement, especially among the blocs we have examined, that tax cuts are a solution to that. Especially given the absence of other positive, workable and popular policies Governments could announce that would genuinely help reduce living costs.

The question then becomes: what kind of tax cuts? Liz Truss has already said she will not go through with the planned increases in corporation tax and National Insurance. The Centre for Policy Studies has strongly endorsed this. But on its own, this package would be portrayed by Labour as prioritising business over the poor. This will be unfair, of course. But if the first priorities for the new Prime Minister are showing empathy and showing there's a clear plan, this can't be allowed to happen. There is therefore also a need to reduce the bills of the lowest paid workers. In fact, our polling evidence suggests this should be an overwhelming priority.

To our working-class voters, a fair economic policy disproportionately means tax reductions primarily for them; not general tax cuts that will help everyone. The new Government should bear this strongly in mind when drawing up its plans.

The continued importance of levelling up

Neither Liz Truss nor RIshi Sunak prioritised levelling up in the leadership election. Both made commitments to continue the policy – partly pressured by the Northern Research Group of MPs – but neither saw it as an immediate electoral priority. This is understandable; the electorate of MPs and Conservative activists (who are mostly

Southern and mostly affluent) are just less interested in levelling up than the wider public, and leadership candidates have to chase votes where they find them.

However, for the wobbling working-class voters, success on levelling up is vital. As our CPS poll shows, they're much more likely than others to say their towns have deteriorated in recent years; in the focus groups, they were more animated about the decline of their towns than almost any issue.

This tends to come out in a few ways: most importantly, a sadness their towns no longer have the 'hustle and bustle' of the past, with the high street a shell of what it used to be. Also, there is anger that anti-social behaviour has increased, including open drug use and drug dealing, as well as vandalism and graffiti that make their towns feel run down. There is also depression about the decline of historic markets, fairs and festivals, which once brought communities together.

'In places like Walsall, they talk fondly about the high street of 30 years ago and they're confused and angry that their long-running annual festival has ceased'

Overall, working-class people lament a decline of civic pride. In towns up and down the country, people are still proud about where they come from, but they're depressingly realistic about the state of their towns. In places like Walsall, they talk fondly about the high street of 30 years ago and they're confused and angry that their long-running annual festival – which they liken to a 'mini Blackpool illuminations' – has ceased. There are similar stories across the country.

Of course, real levelling up demands money, via economic growth. If towns and cities are going to attract jobs and commerce, that needs new businesses to invest and grow. In turn, that requires better local education, better transport links, better housing, and so on, to attract people there in the first place. But this isn't really what working-class people say they want. What they want is for their town centres – their high streets above all – to be busy and safe. Rightly or wrongly, they're less interested in turning around the economic fortunes of their area in the long term, and more interested in making life a bit better than it is now in the immediate future.

Over the last couple of years, politicians have often talked about grand plans to massively improve public transport links and so on. Working-class people, sceptical about big political promises at the best of times, have tend to tune these out. But with only a couple of years until the next general election, the next Government is going to have to prove that its levelling up strategy has worked. And the fact that working-class people tend to lean towards incremental change locally, rather than long-term structural revolution, is actually a help politically: it means Government can make progress with policies on the high street, anti-social behaviour and local culture which aren't going to take years to see through. Boris Johnson's Government has already done a lot in this space: a new Towns Fund; supporting local football clubs; and so on. The next Government should double down on this and try to make as much visible, tangible progress.

Special attention on anti-social behaviour

An important side note, worth making on its own: as we note above, the conversation with voters on levelling up very rapidly becomes a conversation on anti-social behaviour. The Conservatives should prioritise this into the next election and beyond.

Most people expect serious crime to rise during the cost of living crisis; they expect muggings, burglaries and the like to increase. But outside the biggest cities, ordinary working-class voters are much more preoccupied with low-level, anti-social behaviour than with violent crime. They hate vandalism, open drug use and aggressive begging.

Cracking down on anti-social behaviour should therefore be an integral part of the Conservatives' levelling up strategy. But it should also be an integral part of their governing agenda into the future, regardless of what happens on levelling up.

Not all of this is about more police on the streets, although this is of course voters' preference. It's also about ensuring legislation and sentencing deals with problems, and thinking more intelligently about urban planning laws and regeneration projects in order to discourage anti-social behaviour.

Cutting waste and unnecessary spending – and more

In the aftermath of the financial crisis, the Conservatives were frank about the need to sort out the public finances. Over time, the Conservatives have become a less fiscally conservative party. Conservative politicians sometimes seem reluctant to say they'd make any sorts of cuts at all. Furthermore, since the Covid crisis – and the introduction of massive furlough payments – it feels like MPs view Government debt as too big to worry about. So in the leadership campaign, while there were regular warnings about the need to regain economic stability, there were few hard commitments to reducing public spending.

It's hard to know where this reticence comes from. The public know how much damage Covid wrought and how much we spent on furlough payments. They know rampant inflation – particularly on energy bills – is likely to make the public finances even worse. They are therefore realistic about the prospect of cuts to public spending.

'Conservative strategists have talked themselves into a firm belief that focusing on waste is itself a waste of time'

It goes without saying that there are a small number of areas that are totally off limits in the public's mind: the NHS being the most obvious; and frontline spending on schools probably another (although there is some flexibility here). But most other things should be considered reasonable in the right (ie wrong) circumstances.

There are also some areas where the public are positively enthused about cutting spending. Public First have polled this extensively for the TaxPayers' Alliance in the past, and our CPS poll confirms that voters of all stripes (not just Conservatives) would like the Government to spend less and tax less rather than spend more and tax more. Indeed, the public not only think there is a lot of waste and unnecessary spending, but that cutting it would make a big difference.

Conservative strategists have talked themselves into a firm belief that focusing on waste is itself a waste of time. They think no one believes waste can or will be cut. Where this comes from is a mystery; it's emphatically not my experience in many, many polls and focus groups on the issue. The Conservative electoral experience in the 2010 and 2015 elections also suggests the public are realistic about the need for cuts on occasion. And being proactive about the need for cuts could play especially well with less affluent voters if it is seen to fund – directly – financial help to them.

This is not a policy point – we have not analysed potential waste in the government as part of this project – but a reflection of voter opinion.

What about Net Zero?

Net Zero was not a prominent feature of the research: our questions were very broadly focused and the mostly Conservative voters we spoke to didn't bring it up spontaneously in our conversations, which were mostly dominated by discussions on the cost of living. However, Public First have done enough research in the last couple of years on Net Zero to talk generally about it.

In parts of the media, there's a belief that working-class voters are ambivalent – if not bemused – about the recent focus on the environment and Net Zero. This has grown into a belief that working-class voters have become hostile to Net Zero policies, which are said to add significant costs to their bills.

> **'Looking to fire up working-class voters with some assault on Net Zero is a fool's errand; it simply isn't borne out by the research'**

But this isn't actually true. The environment – broadly defined – is a high tier two issue for most working-class voters, having steadily climbed over the last few years (ie important, but not quite as important as the biggest issues such as the state of the economy or NHS). Yes, it's more important to younger, affluent voters – but it still matters to working-class voters. In focus group discussions, working-class voters tend to say the same thing: that they worry about the world they'll leave behind for their children and grandchildren. They support high-impact environmental policies and they support Net Zero conceptually.

Obviously, in a cost of living crisis everyone worries about every penny that they spend. As we have seen, there are now vast numbers of working-class voters who feel they simply cannot spend any more at all. Consequently, polls in the future will show public hostility to anything – including environmental measures – which adds to their costs.

However, the research shows clearly that people continue to care deeply about the environment and believe that there are large numbers of other areas which ought to be the target for cuts. In their minds, why would you make cuts to something that's actually 'good'? Why would you not focus on other areas which are adding costs to ordinary people before targeting things that might help us all in the future?

In short, looking to fire up working-class voters with some assault on Net Zero is a fool's errand; it simply isn't borne out by the research.

Keep quiet about the culture war

As with Net Zero, there are many commentators and politicians who have convinced themselves that the way to keep working-class voters on side is to rage about 'wokery'. But in our research for this project – and in the research Public First has conducted elsewhere – this simply isn't the case. The conversation around 'wokery' largely passes the public by.

With this in mind, there's no mileage for the Conservatives in deliberately kick-starting a broad-based culture war – especially not as an attempted distraction from cost of living. This could change if a Labour Government came in and went full-steam-ahead to introduce wave after wave of 'woke' policies. However, unless and until that happens, the public don't follow the culture war and don't care about it; engaging in it therefore looks weird at best and rude at worst.

There is an important caveat here. Throughout this document, I have made the argument that all Conservative voters are very patriotic – and therefore that this ought to be a defining theme for the Government. This isn't a 'cultural' issue for the most part; however, there are times when the culture war does touch on patriotism and history.

'There's no mileage for the Conservatives in deliberately kick-starting a broad-based culture war – especially not as an attempted distraction from cost of living'

Here, the centre-right movement should be robust. Again, people are turned off by a hyper-assertive, aggressive patriotism. But they want and expect a simple, robust defence of this country, its values and its history. This isn't to say they think every aspect of British history was perfect; on the contrary, they are well-aware that there are many dark moments. But they think overall Britain should be proud of its history.

Conclusion

This is hardly an ideal time for a new Government to be taking power. The cost of living crisis is wreaking appalling damage to millions of people across the country – and the electoral coalition that delivered a landslide majority for the Conservative Party in 2019 is starting to crack under the strain.

But all is not yet lost for the Tories, or for the broader centre-right. As this analysis has made clear, of the four groups who make up their electoral coalition (working-class Leave, working-class Remain, affluent Leave, affluent Remain) none are yet convinced by Keir Starmer's Labour Party. Those who are leaving the Conservatives are generally not moving straight over to Labour, and have significant reservations about it.

'It is the daily strugglers and stressed workers who are most wobbly on the Tories, and most in need of reassurance'

In answering this challenge, the Conservatives need to be aware of – and focused on – the reality of their electorate. The Brexit vote has broadened the Tory coalition, opening up the party to millions of working-class voters. In the process, the electoral battleground has moved. The 'Just About Managings', who were wavering between Tory and Labour, are now a core part of the Conservative coalition. It is the daily strugglers and stressed workers who are most wobbly on the Tories, and most in need of reassurance.

The Tory party therefore needs to focus not on the needs of some imaginary 'blue wall', but in delivering an agenda that shows those working-class voters that it is on their side – not least because that is an agenda supported by their other supporters and capable of retaining them. Meeting the cost of living challenge is absolutely core to that, because that is where those voters feel the pain most acutely, and where they most doubt that the Conservatives are indeed on their side. For the new Prime Minister, the result is an extraordinary challenge – but also, potentially, an extraordinary opportunity.

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