

Common Ground Conservatism

By James Frayne

About 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, business and economic growth, as well as housing, energy and innovation, its mission is to develop policies that widen enterprise, ownership and opportunity.

Founded in 1974 by Sir Keith Joseph and Margaret Thatcher, the CPS has a proud record of turning ideas into practical policy. As well as developing much of the Thatcher reform agenda, its research has inspired many more recent policy innovations, such as raising the personal allowance and National Insurance threshold, reintroducing free ports and adopting 'full expensing' for capital investment.

About the Author

James Frayne is a highly regarded political strategist, currently Chairman of policy research agency Public First. He has held several senior roles in the political and corporate worlds in London and New York City. He was Director of Communications for the Department for Education, overseeing the presentation of the Government's radical education reforms after the 2010 election. James writes regularly on public opinion and strategy for a range of publications, most regularly in The Sunday Telegraph and The Times. He began his career working in political campaigns, acting as Campaign Director for the victorious North East Says No campaign in the referendum on regional devolution in 2004.

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Introduction

The post-mortem on the Conservative Party's defeat should be short and extremely simple. The party was brutally ejected from power because it massively inflated expectations about what it could achieve in Government and catastrophically failed to deliver.

Policy failure was widespread, but electorally it mattered most in three areas. The Conservatives promised to build more hospitals, but the NHS collapsed. They promised a stable, growing economy, but it ground to a halt and inflation was rampant. They promised to reduce immigration by acting decisively but talking about it quietly; instead, they talked tough while opening the borders, with immigration consequently reaching record levels.

The Conservatives' defeat, in other words, was driven by policy failure. And the party can only recover when it not only rebuilds its reputation for competence but develops a policy agenda that convinces voters it is on their side – and can make their lives better.

‘The purpose of this document, is to explain why the Conservative Party lost, and offer constructive suggestions for how it – and the wider centre-right – can rebuild’

At the same time, however, there is no point merely repeating voters' opinions back to them. Voters, as this document will show, want all sorts of things. Some of those things accord with traditional Conservative thinking; others, less so.

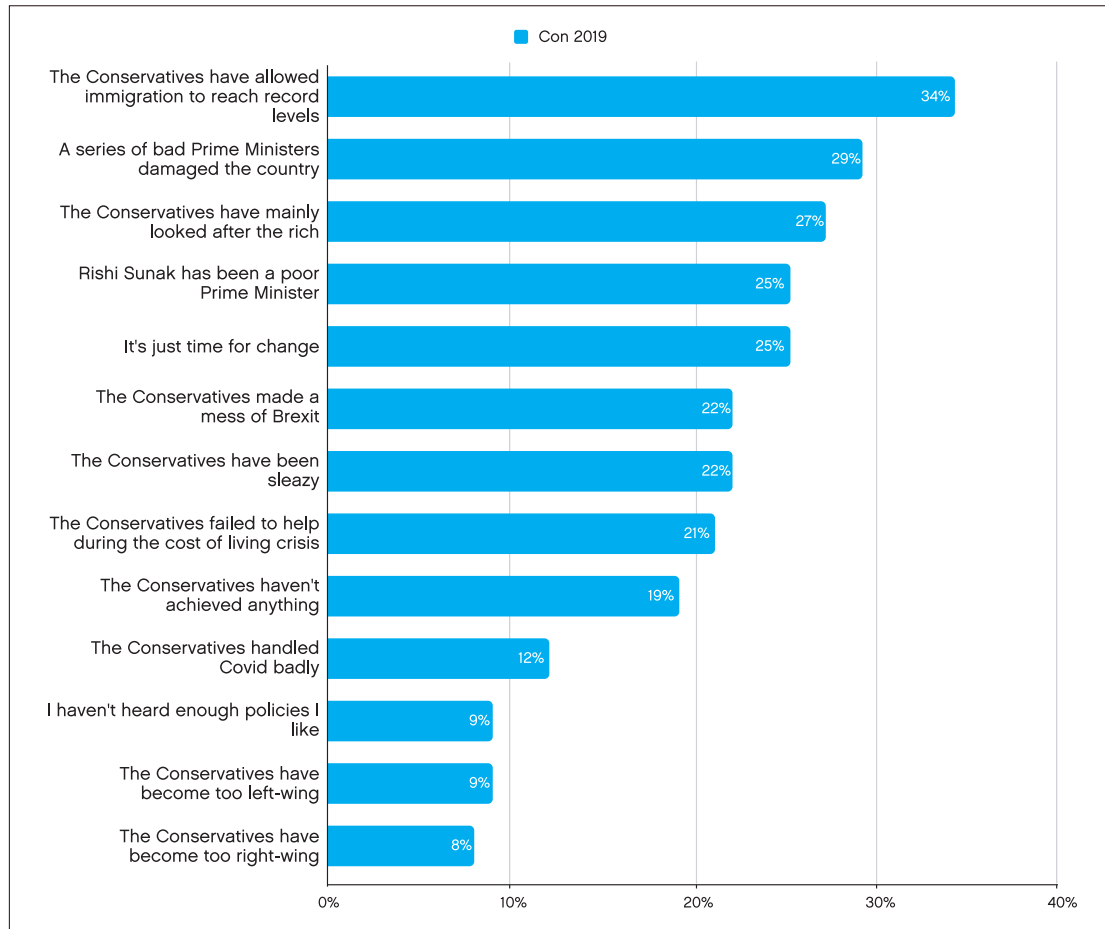
The purpose of this document, then, is to explain why the Conservative Party lost, and offer constructive suggestions for how it – and the wider centre-right – can rebuild. It sets out the overall approach to policy development that can secure the support or consent of prospective voters. It examines those policy areas where a robust conservative message, of the kind traditionally championed by the Centre for Policy Studies, strikes a chord with voters, and those where politicians and strategists will need to tread more carefully, or make far more of an effort than we saw over the past 14 years to persuade voters.

This report is informed by original research conducted by opinion research agency Public First in advance of the election. First, we conducted a poll of 4,000 voters between June 21 and June 25, 2024. We also held three 'immersive research' exercises around the same period, in Don Valley, Guildford, and Swindon – locations chosen as marginal seats, with the prospect of voting Conservative in the future, covering a cross-section of socio-economic backgrounds.

The route back for the Conservatives lies in intelligent policy development. The research for this report was therefore very heavily focused on policy. The full polling tables are worth looking at in detail; they provide many dozens of questions on different policy options different parties could take. We can't think of a more detailed policy poll in recent times.

The immersive research we conducted is different from traditional focus groups. Immersive research involves spending multiple days in a single location, meeting voters in the places where they live, work and socialise – while taking care to ensure that the sample of interviewees is demographically representative, and supplementing the research with traditional focus groups held in the evenings to interrogate policy ideas in more depth. This enables researchers not just to speak to many more people than they would in a focus group but, most importantly, to have natural conversations which encourage greater candour. Immersives also allow researchers to speak to people who would never attend a focus group or fill in a polling questionnaire.

You said that you would rule out voting for the Conservative Party in this general election. Which of the following reasons best explains why? Select up to three



In both the quantitative and qualitative work, we sought to overcome the toxicity of the Tory brand by asking people to think about a new party that they might be interested in supporting, and what policies they would prefer it to offer.

So, what did we find?

The most obvious thing to say is also the most important: there is a path to a Conservative revival, albeit a narrow one.

We asked voters in our poll both whether they intended to vote Conservative, and whether they could ever see themselves voting Conservative. On the latter question, half of voters said they could not. But that means that half of voters – including 82% of those who voted Conservative in 2019, the high-water mark of the party's electoral fortunes in recent years – were open to supporting the party, at least in theory. That is not a huge audience. But it is enough for the Tories to have at least a theoretical prospect of forming a government.

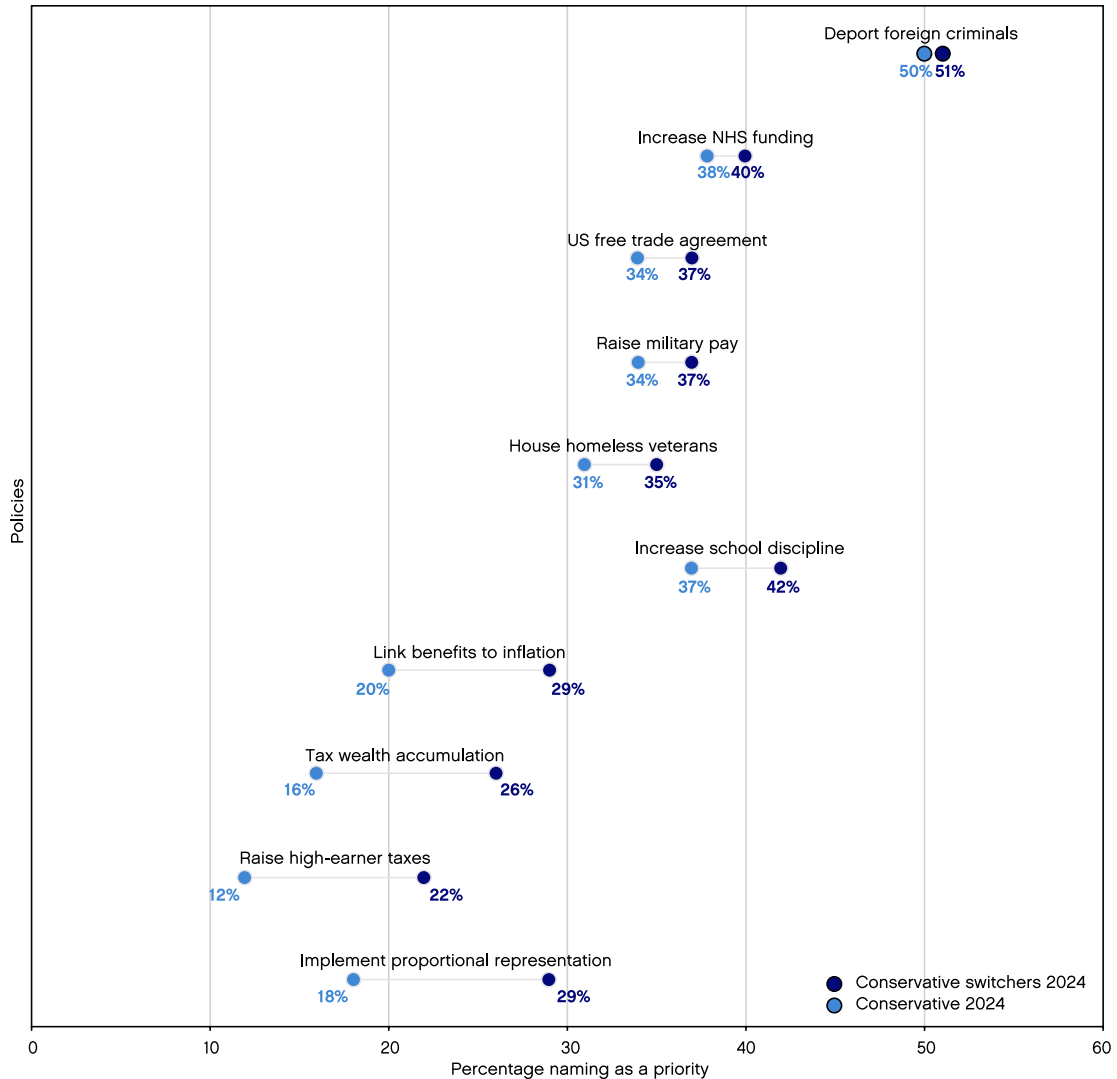
The next point, however, is almost equally important. Many people have argued that the Conservatives lost two different types of voters: affluent, middle-class graduates to Labour and the Lib Dems, and working-class Brexit supporters to Reform. They argue that it will be impossible, or at least very difficult, to win back both of these groups at once. In short, Boris Johnson's electoral coalition was a one-off.

This fear is misplaced. The very striking thing, from this research, is how much those voters who left the Conservatives look like those who stayed, at least in terms of their political attitudes. There are cavernous gaps in attitude between Conservative 2019 voters and Labour 2019 voters. But the gaps between Conservative loyalists and Conservative switchers are far harder to discern.

Policies with largest priority difference between Conservative and Labour voters



Policies with largest priority difference between Conservative voters and Conservative switchers



In particular, there is a core set of largely social issues – border control, welfare, crime and the family (defined broadly) – where there is complete unanimity among the Conservatives’ potential electorate, in a way which maps on to a traditionally conservative position.

Similarly, there has been an argument in many quarters that the Conservatives put off swathes of voters by being too ‘right-wing’. This is simply not how voters view it. The answer that the Tories were too right-wing was the least popular explanation when we asked why people would not support the party. (Correspondingly, the explanation that they had become too left-wing was only barely more popular.)

Voters don’t view, say, border control, as being an inherently right-wing thing to care about. They think everyone should care about it. Being seen as ‘right-wing’ hasn’t dragged the Conservative Party down. What has dragged the Conservative Party down is its policy failures; the perception that grew that the party was sleazy and incompetent; and, among working-class voters in particular, the perception (which has dogged the party for decades) that it is primarily a party for the rich.

The implication from this finding is certainly not that the Conservatives should self-consciously pivot to the hard-right; this would be ludicrous. Rather, it suggests that the public simply don't view many issues in the same way as Westminster commentators; they don't see, say, reducing immigration as dangerously right-wing, but as a sensible mainstream policy.

'I think they're too busy looking after themselves, looking at their own careers, and jockeying for position. I also think too many of them are sort of ex-Oxbridge, straight into politics and haven't had much experience outside. They really are out of touch with reality.' – **Woman, 50s, Guildford**

The policy challenge

The rebuilding process will not be easy. As is obvious to everyone, the Conservative brand is hugely tainted. But since the Conservatives lost because of failures on specific policies, developing a serious policy platform is the only way to regain trust.

Some will ask whether it's possible to demonstrate policy credibility from Opposition – without the research resources that come with being in Government, or the ability to prove policies are working. This is wrong; while the task is different and, yes, harder, it is possible to achieve. In any case, the Conservatives have no choice but to regain credibility on policy.

Popular policy development primarily requires creative ideas that are achievable, fully costed, and chime with the public – or at least carry public consent. Crucially, these policies must align with the challenges we face as a country. We need policies to further the prosperity of the country and improve the lives of everyone that lives here.

Ultimately, therefore, the challenge for the Conservative Party is not merely to create policies that are electorally popular. They tried that in office, listening to wild public demands for state action and deciding they had no option but to craft policies to meet demand. Instead, they need to create policies that will genuinely help the country, but that can be realistically implemented because they carry public support or consent. Sometimes, this means the Conservatives need to engage in battles which might not win them immediate popularity (although that aren't toxic), but that are completely critical for political advancement elsewhere.

So which policies should the Conservatives prioritise?

Listed below are a selection of principles which, we believe, almost every Conservative could agree form the core of the party's traditional agenda:

- Lower taxes on individuals and businesses
- Making work more attractive than welfare
- Building stable families, of whatever type
- Supporting home ownership and entrepreneurship
- Building a system of secure borders and orderly, managed and lower immigration
- A smaller state, with the government intervening less in the economy and in social issues

- More choice for the public in public services, with an additional focus on efficiency and improved productivity
- Strong and just policies on law and order
- Strong armed forces, with an active alliance with our new and long-standing allies
- Defending liberal democracy, free speech and free expression

‘Conservatives strongly carry public opinion – or at least the opinion of the largest electoral coalition available to them – on work and welfare, building stable families, border control, and law and order’

Developing a policy platform along these lines is tricky. This research suggests there are some areas where a conservative approach will carry voters with enthusiasm, some where the public will go along with such an approach, and some where the Conservatives would run into difficulties.

Our research shows the Conservatives strongly carry public opinion – or at least the opinion of the largest electoral coalition available to them – on work and welfare, building stable families, border control, and law and order. There are also clear dividing lines on these issues between the Conservatives and Labour. So, the party can and should develop and market policies on these areas confidently.

However, on taxes, the size of the state, defending liberal democracy, and free speech, the picture is more complicated.

I have conducted a vast amount of research on tax over two decades. There is no denying that the public don't currently see tax cuts for individuals as a priority, and certainly don't view tax cuts for businesses as a priority.

That said, beneath the top lines, things are more complex.

In my experience, people do want lower taxes wherever possible. However, at this point, they are so spooked about the state of the NHS that they fear anything at all which might reduce its funding – and make it more difficult to secure GP appointments and routine hospital appointments. Tax cuts are therefore a frightening prospect.

But there is more to it: most simply doubt they'll ever see lower taxes. You can't blame them: after all, when were taxes last meaningfully cut? And because they've never seen them meaningfully cut, they don't know the benefits that lower taxes might bring.

On business and entrepreneurship, opinion ebbs and flows. At present, and since the cost of living crisis, there is a sense among many voters that businesses had a 'good crisis' because it gave them the excuse to raise prices and increase profits, at the expense of their customers. Many voters have the same suspicions about the pandemic.

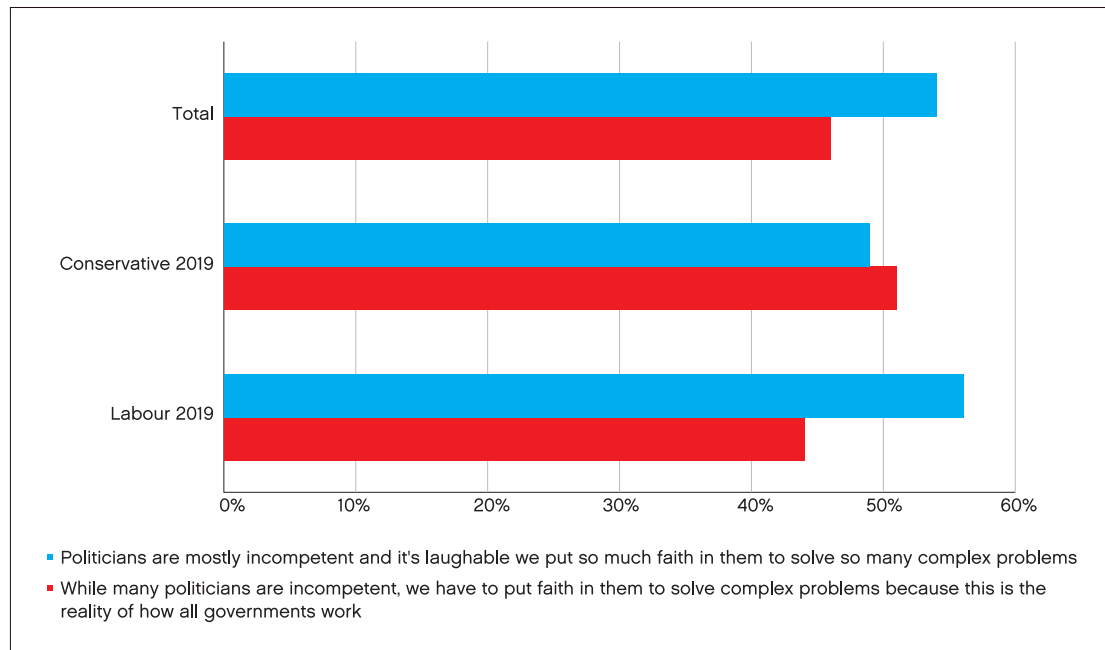
However, just a few years ago, in the first few years after the Brexit referendum, there was a surge in sympathy for the demands of businesses – because there was great fear businesses would up and leave Britain.

The public are therefore open to the argument that we need to be pro-business because otherwise businesses will up and leave. But the policies in this area that really light a fire under them are those that are supportive of small businesses, which are viewed as utterly central to the communities in which they operate.

‘So if they do pay proper taxation here, they won’t stay and so they won’t employ people here. They won’t put their money back into the economy here. I don’t agree with the rich getting richer. I don’t agree with that at all. But we do need to have big companies here and not just tax them because they just won’t stay.’ – **Woman, 30s, Guildford**

On the size of the state, things are more difficult. Broadly speaking, most people – including a vast number of Conservative 2019 voters – want the state to be doing more to solve big problems. That includes areas which might be considered more ‘personal’ in nature (most obviously, people’s health and wellbeing).

Which do you agree with more?



At the same time, however, while they want the state to be doing more, they have never been so hostile towards modern politicians. It’s no exaggeration to say most people think this crop of politicians are completely useless. (And that the last Conservative Government was historically, uniquely useless.)

The upshot is that Conservatives can make small-state arguments, but it needs to be done through the prism of scepticism about politicians. In fact, simply replacing the word ‘government’ with ‘politicians’ in the polling always has a dramatic difference on the popularity of particular messages.

A policy approach for success

This research is useful in understanding the political parameters the Conservatives are operating within. But it doesn't imply the Tories should only develop a policy platform on issues the public will immediately respond positively to.

On the contrary, the Conservatives have no choice but to engage in crucial battles on taxes (and growth), the small state, choice in public services, the need for greater housebuilding, and the value of free speech and liberal democracy.

This is for two reasons. First, most importantly, because the country's prosperity and wellbeing depend on the protection and promotion of these policies and values.

Second, because progress on these issues determines progress elsewhere. For example, the Conservatives cannot make real progress on tax if voters don't accept that there are limits on politicians' competence and should be limits to their ambition. The Conservatives ought not expect to be swept back into power on the back of promises around limiting the size of the state and cutting taxes and so on. Talking about cutting taxes or regulation for business could well provoke that dreaded reaction: 'There they go again'. But they need to at least explain why they believe in those things, and why they matter.

‘The Conservatives cannot make real progress on tax if voters don't accept that there are limits on politicians' competence and should be limits to their ambition’

That said, while the Conservatives shouldn't avoid engaging on these more difficult but fundamental issues, their policy approach should be driven by themes where they can make serious progress: those issues voters care about and, for the most part, where there are clear dividing lines between Tories and Labour. This means a mainstream policy platform heavily influenced by welfare reform, supporting family life, border control with lower but continued, managed immigration, and law and order.

After the election, it seemed as though Labour had accepted most of these lessons too, albeit in their own way. While they are approaching these issues differently to the Conservatives, they know that they must take control of borders and reduce immigration to manageable levels, crack down on crime and anti-social behaviour, and get people off long-term welfare. They know their majority in Parliament was secured in part by reassuring working-class voters that they could be trusted on these issues.

The Conservative Party's predicament cannot be overstated; it is in a diabolical position. That isn't something that can be rectified via a single weekend retreat, nor in a three-month leadership campaign. It will take years of patient work. But our research shows that a path to recovery is there.

Fifty years ago, Sir Keith Joseph – the inspiration behind and co-founder of the Centre for Policy Studies – gave a series of speeches that became set texts for modern Conservatism. He argued that 'the middle ground consensus is only the middle between politicians. It is an ephemeral political compromise. It has no link with achieving the aspirations of the people. The people were far closer to Conservative instincts on many issues. But because we ceased to fight the battle of ideas, and told the people what we thought they wanted to hear, we tended to hear what we were saying rather than what they were saying.'

Some years later, Margaret Thatcher gave a memorial lecture, paying tribute to Joseph. 'As Keith used to remind us,' she said, 'it is not the centre ground but the common ground – the shared instincts and traditions of the British people – on which we should pitch our tents. That ground is solid – whereas the centre ground is as slippery as the spin doctors who have colonised it.'

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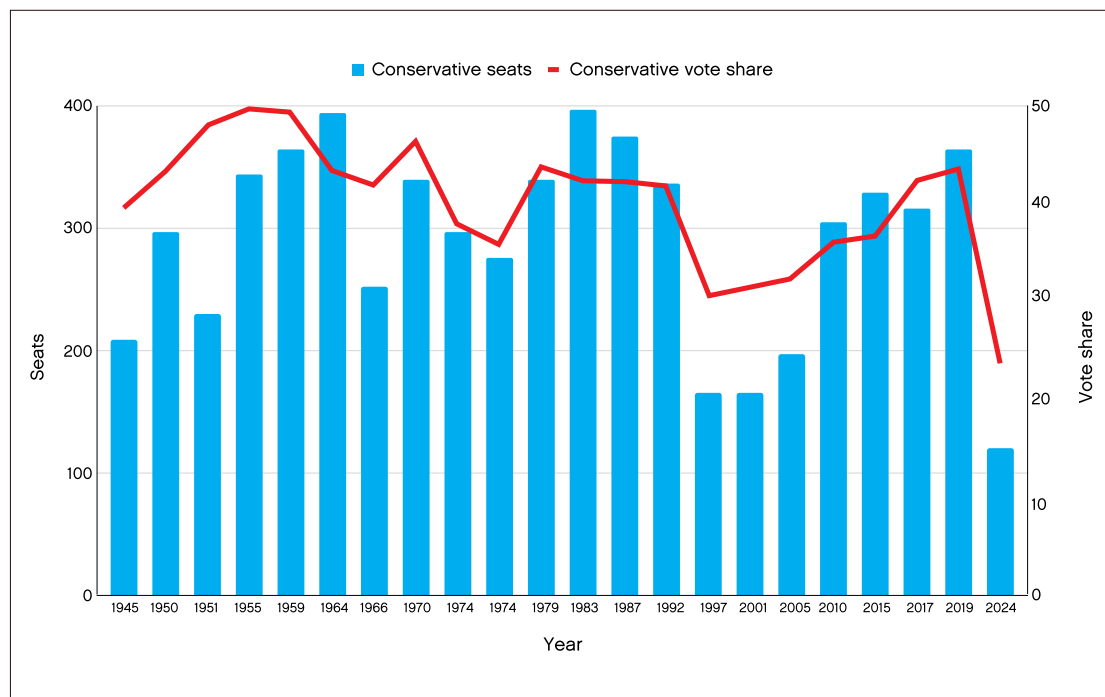
We have called this project ‘Common Ground Conservatism’ because that is what we have tried to do: identify the common ground between the British people and the Conservative movement, on which a new Conservatism can be built.

We have no monopoly of wisdom, nor do we have all the answers; many people have contributed usefully to this debate and we look forward to others doing the same. But we believe that the new leader of the Conservative Party will need to take the lessons of this report firmly on board.

Chapter 1 – The post-mortem

The Conservatives' defeat was historic. There is no hiding place: many, many people came to hate the Conservative Party and will for a long time. Yes, Labour's massive majority overstates their popularity with the public, given their relatively low vote share. But Conservatives ought not take much consolation from that.

Conservative seats and Conservative vote share



Where did it all go wrong?

Let's begin by reminding ourselves of the position in December 2019. The Conservative Party won a huge victory that December. They remained popular by historical standards for the first 18 months in Government – even through the pandemic, where their record was at best mixed. This was for a variety of reasons.

First, Boris Johnson was initially popular. He was respected for 'getting Brexit done' and introducing the so-called 'Australian-style' points system for immigration (which, without properly understanding, people had been desperate for). Second, the public rallied behind the Government during the pandemic; there was a sense from many voters that it was 'unpatriotic' to turn on a Government in a time of national crisis. Third, Keir Starmer struggled to define himself as anything other than a reactive politician who, people in focus groups endlessly commented, did nothing but 'moan from the sidelines'.

In our view, there was a short-lived but critical fourth reason: the Conservatives' pivot to working-class voters and 'levelling up' briefly and genuinely connected them with large swathes of the North of England and Midlands. While the electorate in these areas was never convinced of the merits of 'levelling up' – nor the reality of Government being able to achieve such an ambition – they appreciated that the Conservatives seemed to be trying to look after them (hitherto, the party had been dismissed as posh and Southern). The Conservatives duly trounced Labour in the 2021 local elections, carrying many of these provincial areas – despite at best a patchy performance during the pandemic.

‘The Conservatives’ pivot to working-class voters and ‘levelling up’ briefly and genuinely connected them with large swathes of the North of England and Midlands’

In our experience – having conducted vast amounts of qualitative research at this time – the Conservatives started to lose popularity in earnest in the autumn of 2021. First to peel off were working-class voters who voted for them over Brexit; they were angry the Government was doing little to stop the arrival of small boats from France. Next to go were poorer working-class voters, who were less motivated by Brexit and more focused on the Conservatives' promises on work and the economy. They felt the Government was doing little to help them with the developing cost of living crisis, which was just beginning in earnest at that point.

All of this happened without much comment in Westminster; Conservative politicians didn't seem to notice what was happening to the ground beneath their feet. Perhaps because Starmer's Labour seemed to be struggling so badly, they seemed to assume the polling shift just reflected inevitable, inescapable 'mid-term blues'. In fact, the flight of working-class voters was based on extreme disappointment in a party that seemed to be casually betraying its promises on policy.

The floodgates opened after 'partygate'. Initially, many people weren't as bothered as we now remember about advisers and politicians drinking in Downing Street and elsewhere; it was irritating to hear when they themselves were subject to tight restrictions on socialising, but they might have put up with it. After all, many accepted, these advisers were working long, hard hours in difficult conditions.

What initial reports on 'partygate' did, though, was provide context for more important policy failures. If the Tories couldn't stop the boats and keep the cost of living down, it was surely because they didn't have their mind on the job.

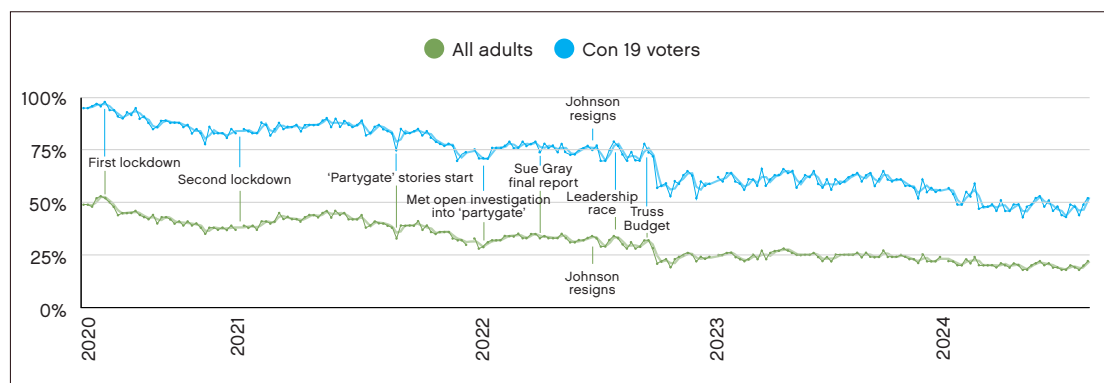
Of course, as the scale of the scandal grew, it became its own problem. It started to look like, yet again, it was one rule for the Government and one rule 'for the rest of us'. And it looked like the politicians were actively lying about the scale of the parties. At this point, there was a great sense of being let down by the Conservatives – even betrayed. This was especially felt in the case of Rishi Sunak; he had been widely viewed as a different sort of politician during the pandemic, and not simply because he was the one who unveiled the furlough scheme. Yes, he seemed lacking in charisma, but he also seemed like a genuine, decent person. The fact that he was caught up in the scandal, and the growing scrutiny of his family's own finances and tax status, fatally undermined his reputation.

Then came the appalling leadership contest, in which candidates spoke endlessly about free speech and other cultural issues, while ignoring the cost of living crisis that was engulfing people across the country. Finally came Liz Truss' victory and her mini-Budget. Again, it is often forgotten, but in the first days after the Budget, the jury was out for most voters. But when the economy looked like it was going off a cliff, the polls went with it. Like with the ERM debacle in 1992, people didn't think they could trust the Conservatives on anything anymore.

But it wasn't just about the economy. The health service never seemed to recover from the battering it received during the pandemic – when the NHS seemed only to care about treating Covid patients and avoiding the further spread of infection. While the health service was probably the biggest public concern on the eve of the election, there was no single moment when people thought the Conservatives had messed up; rather, it slowly dawned on people the NHS was never going to get better under their management.

By the end of Truss' short time in power, the public had completely switched off the Conservative Party and there was no going back. Whether Sunak was the right choice for Prime Minister is irrelevant; it's hard to imagine anyone could have turned things around. The Conservatives were almost inevitably going to be destroyed.

Conservative vote share since 2019 election



Source: YouGov

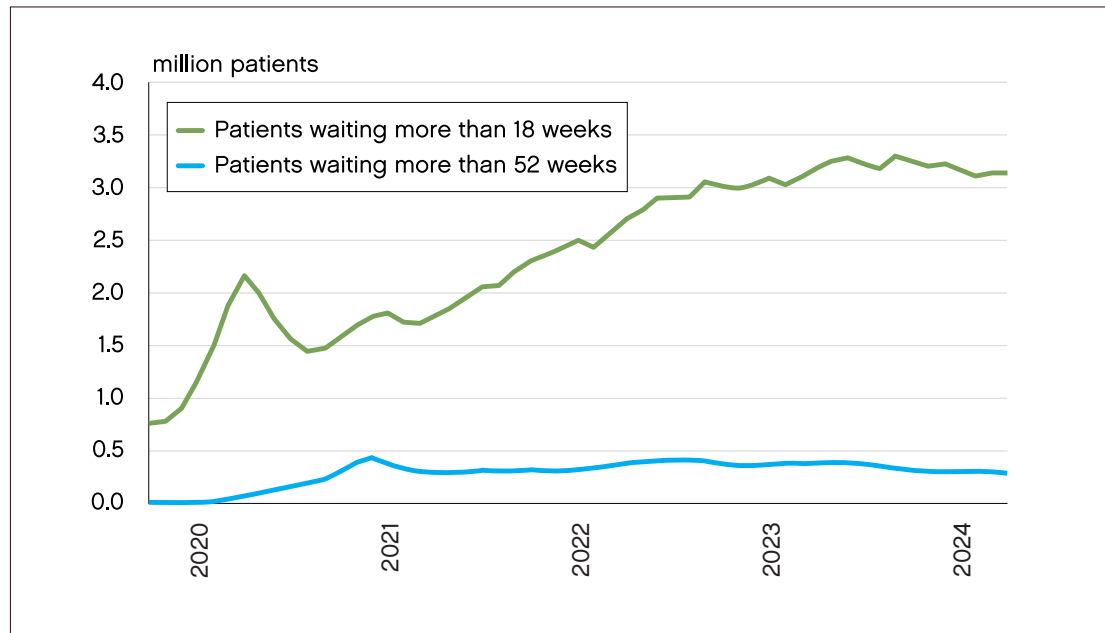
At the point of no return, the Conservatives were viewed as uniquely incompetent – specifically in their ability to meet various policy challenges. They didn't reduce the arrival of small boats; they put refugees and asylum seekers in high-visibility luxury hotels in small towns; they were slow to support people during the cost of living crisis; it became impossible to get GP appointments in many parts of the country; waiting times for routine hospital appointments and planned surgeries rose; and so on.

The culmination of these terrible mistakes was a Conservative brand too damaged to compete at the last election. There are many dozens of data points which drive this point home – in this research project and in the scores of polls produced by other research agencies. Here are just a few statistics from the time of the election:

- By 56% to 25%, people said they had an unfavourable view of the Conservative Party
- By 59% to 23%, they had an unfavourable view of Rishi Sunak
- By 56% to 7%, they thought Rishi Sunak was a bad rather than good leader
- By 55% to 28%, people said they were frustrated at the Conservative Party

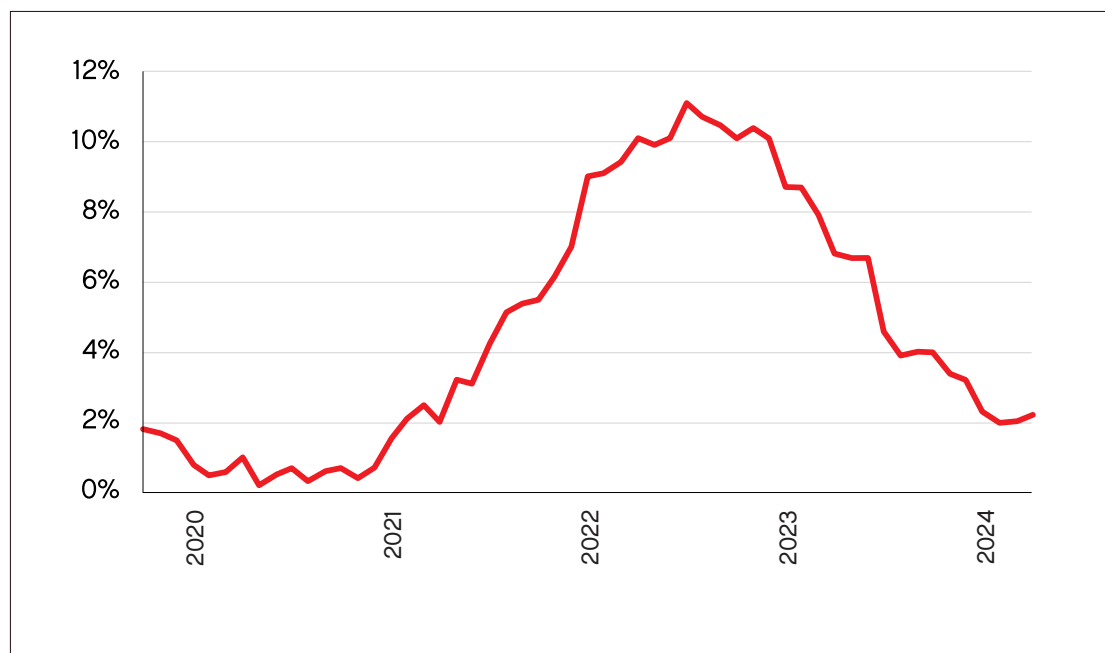
- By 56% to 27%, people said they were disappointed with the Conservative Party
- During the election we found that 36% of all voters said they wanted the Conservatives to win no seats at all at the then-coming election; 46% said they thought the Conservatives deserved to lose 'every seat they have'
- Even 13% of the Tories' 2019 electorate agreed with the first statement

NHS England waiting lists



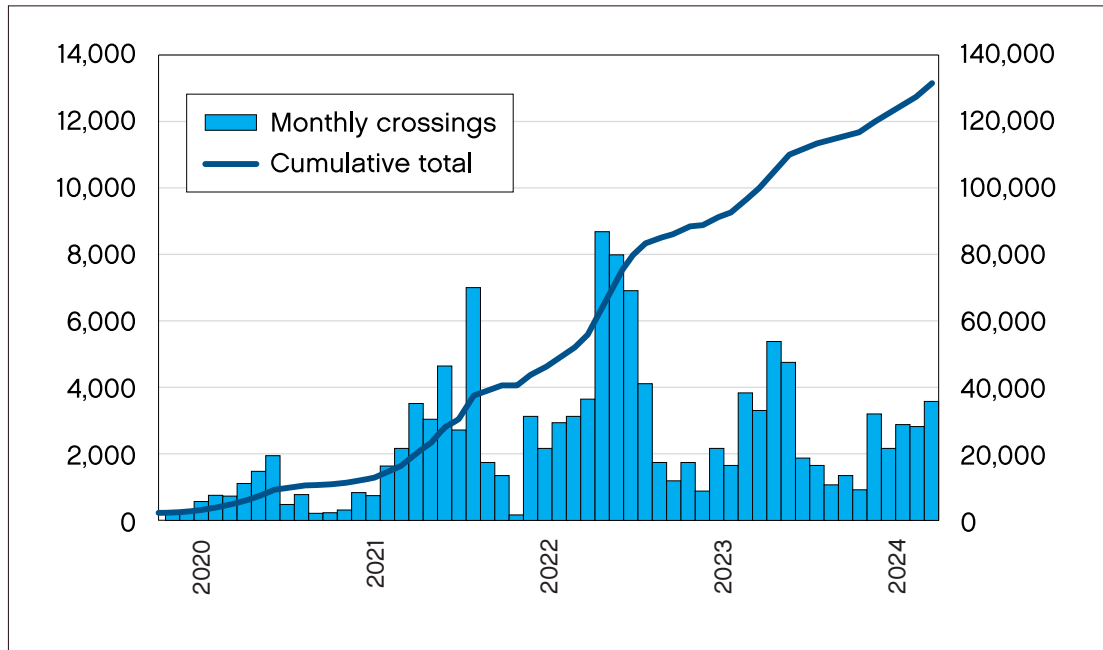
Source: NHS England

CPI inflation rate



Source: ONS

Number of migrants crossing the Channel on small boats



Source: Home Office

Two common analytical errors: that Tories were *generally* right-wing and *generally* incompetent

In the post-election wash-up, two errors have crept into the analysis. The first is the idea that the Conservative Party was viewed as unacceptably right-wing; the second is the idea that the party was viewed as generally incompetent. As is often the case, there are nuggets of truth in these statements, but they obscure more than they reveal.

Many commentators talked about the Conservatives' 'lurch to the right' – as if they were taken over by lunatic, right-wing populists. This was never even vaguely an issue for most voters. In our poll, 'They have become too right wing' was the least selected reason why Conservative 2019 voters refused to vote Conservative in 2024.

As we note above, Conservative voters began to peel away initially because of the Government's failure to prevent the arrival of so many small boats and to return those arriving. In time, this turned into general anger at its inability or unwillingness to reduce conventional, 'legal' migration. The idea that action on these issues is necessarily 'right-wing' is silly; it's absurd to suggest voters thought the party was 'right-wing'. By the same token, it's equally absurd to suggest voters thought the party was too left-wing: this did almost equally badly in our polling. Voters may have felt that the Conservatives no longer shared their values, but almost none of them saw this through a simplistic left-right prism.

To be clear: all this does not mean the public wanted them to be more right-wing; rather, it meant they didn't view Tory concerns on things like border control to be right-wing at all; they were and are viewed as entirely mainstream issues.

'Incompetence' is more complex. While it is clearly, undeniably true the public came to view the party as incompetent – indeed, perhaps uniquely and historically incompetent – that view was determined by specific perceptions of Conservative failure on policy delivery. In our research, when given the choice between a concrete option (such as failure on border control) or more generic condemnation, people were always more likely to select the specific answer than the general. Competence was seen through the prism of concrete policy failure – or through the poor performance of specific leaders, or rather a sequence of them.

This might seem like a distinction without a difference; why does it matter, given that they still ended up concluding that the Conservatives were woefully incompetent?

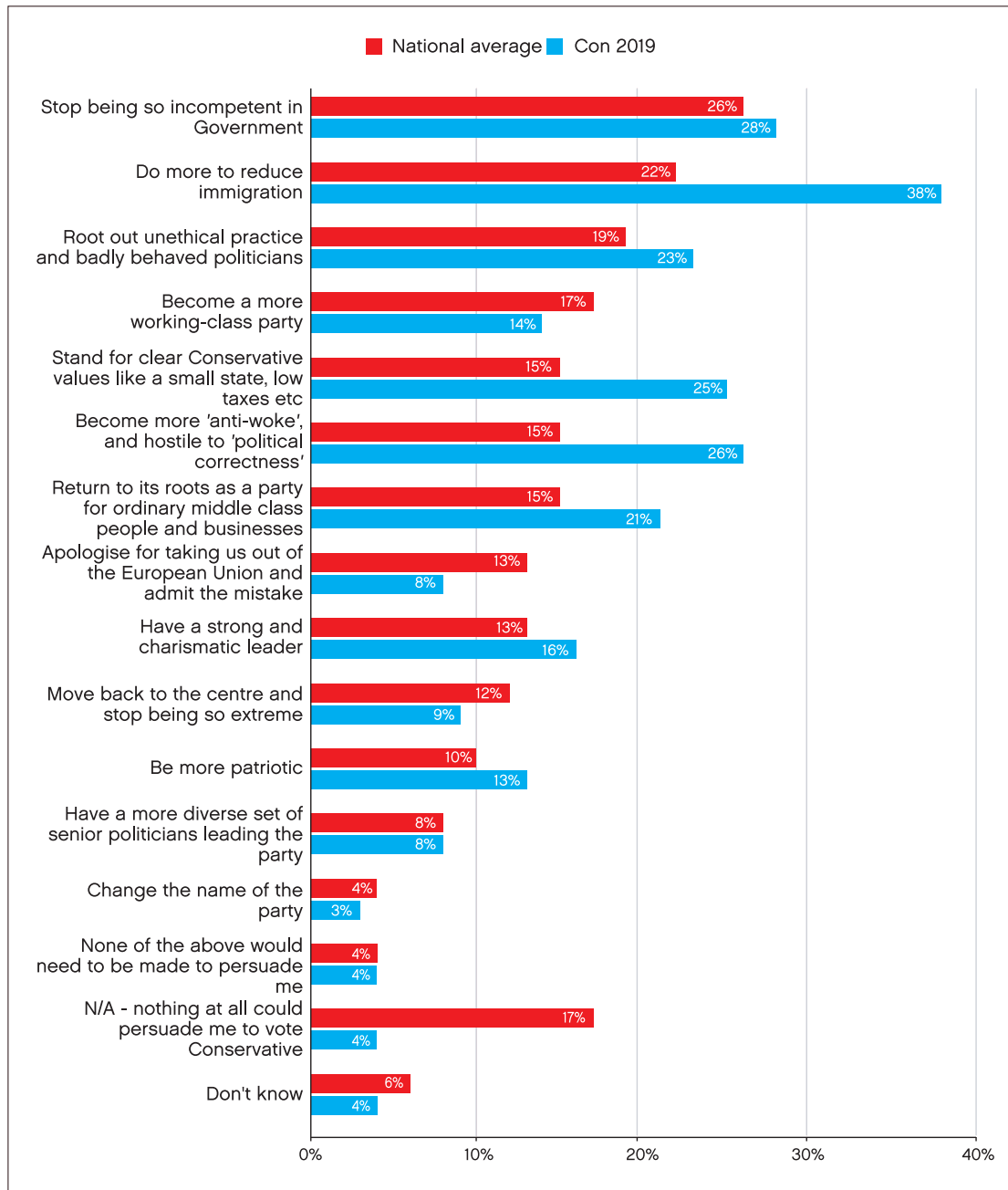
‘The actual problem for the Conservatives was that they failed to deliver on critical policy problems: to reduce immigration, to grow the economy and reduce inflation, and to make it easier to access healthcare’

Well, it matters a great deal if Conservative strategists think the way back with voters is to somehow give off the feeling of competence, rather than getting their act together on policy and leadership.

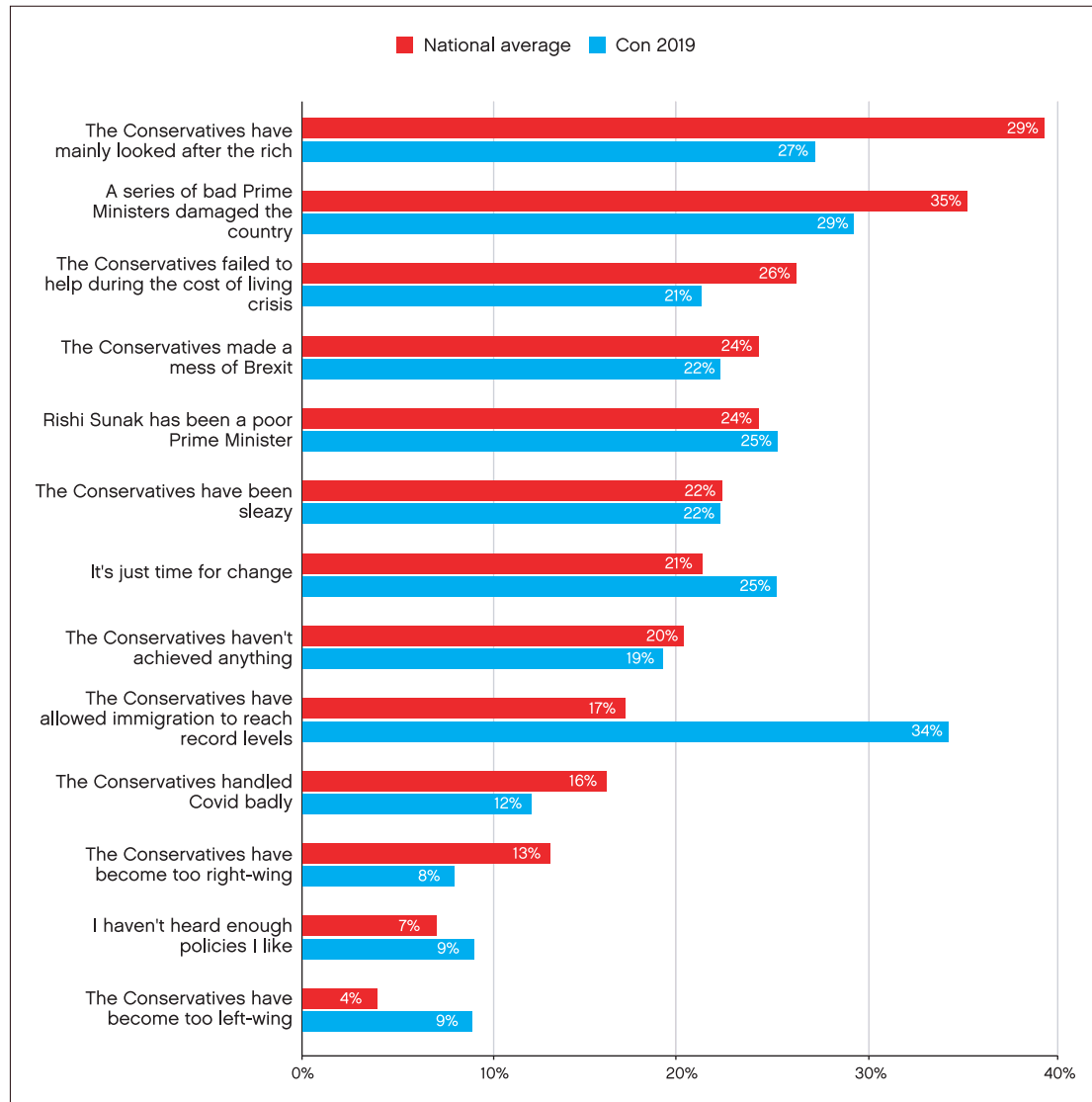
Typically, those who speak about wanting the Conservatives to demonstrate their general competence are those that want the party to take fewer risks, to have fewer rows with opponents and to quietly muddle through; this is what, to them, looks ‘grown-up’, ‘moderate’, and all the rest. The positive pre-election coverage of Keir Starmer was in part based on such an analysis; someone low-key who avoids rows must inherently be more competent than those defined by change.

But again, the actual problem for the Conservatives was that they failed to deliver on critical policy problems: to reduce immigration, to grow the economy and reduce inflation, and to make it easier to access healthcare.

Which of the following changes would the Conservative Party need to make to persuade you to vote for the party in the future? Select up to three



You said that you would rule out voting for the Conservative Party in this general election. Which of the following reasons best explains why? Select up to three



An incompetent party for the rich

There is an important caveat: while the Conservatives' fundamental problem was policy failure, there was an important sense – especially among working-class voters – that the Tories were (and are) a party for the rich.

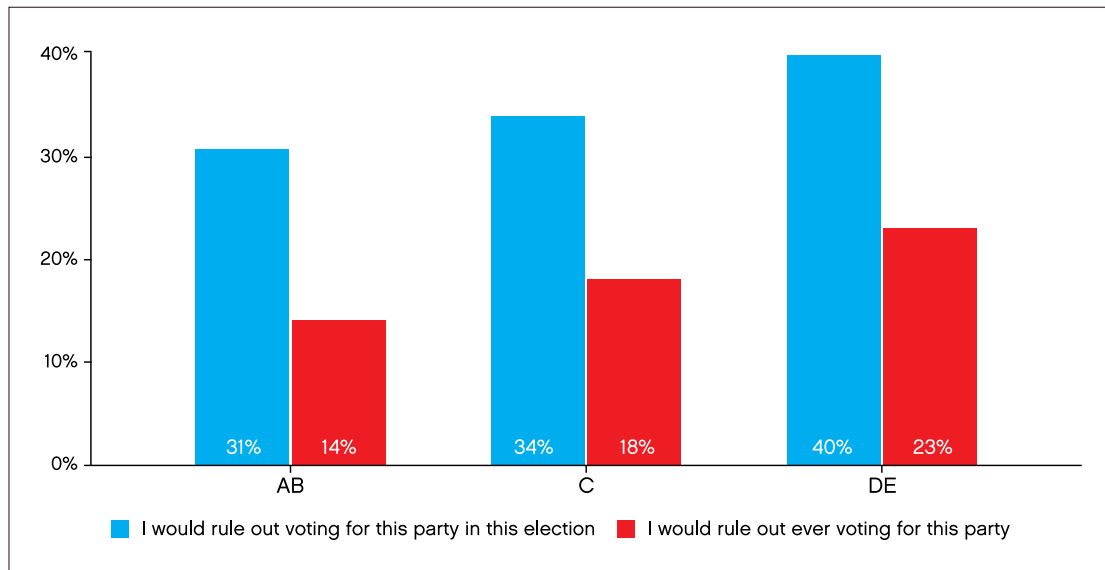
This has long dogged the Conservative Party; it's been a feature of the party brand on and off for three decades at least. In the period after Brexit, and when the party was loudly talking about its ambitions to level up the country, it fell into the background. However, as the cost of living crisis mounted from autumn 2021, the party's slowness to act to protect the lives of poorer working-class voters meant this feeling returned with intensity.

Where does this reputation come from? In some ways, it is as unspecific as it is strongly felt. It comes partly from the nature of its historically leading politicians, who have been viewed (often accurately) as rich and posh. It comes partly from its traditional focus on business, privatisation and reducing taxes for all – which have been easily spun by opponents as looking after other people 'like them'. In more recent times, it has reflected its opponents' focus on welfare cuts and general austerity.

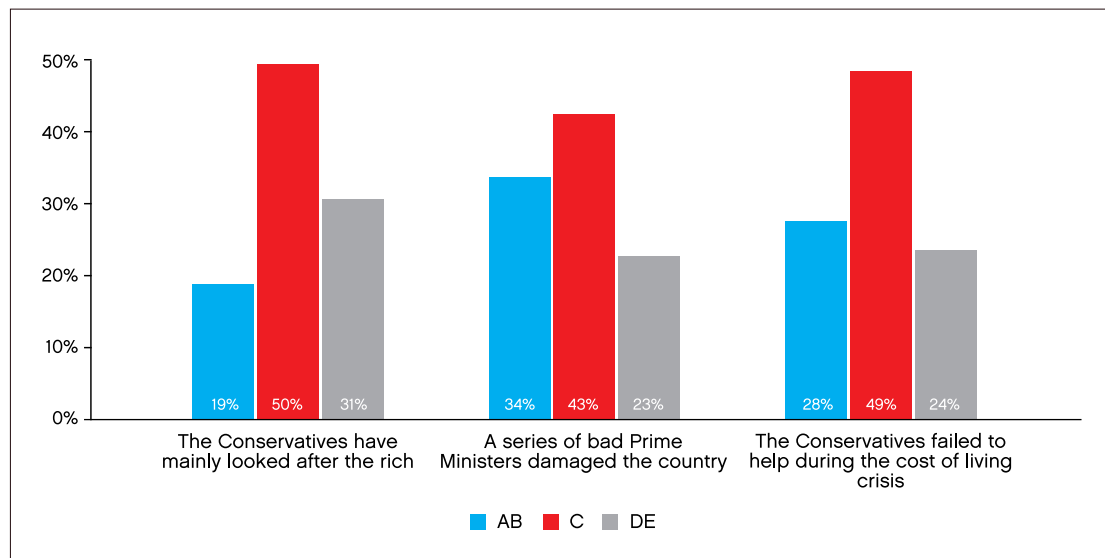
In a previous piece by Public First for the Centre for Policy Studies, carried out in the wake of Boris Johnson's departure, I warned that this perception could prove crippling to the party's reputation. It is fair to say that whatever their individual merits, Liz Truss' plans to abolish the top rate of tax and reverse increases in corporation tax hardly allayed such fears, even before mortgage costs began to rise.

By the time of the election, when we asked why they wouldn't vote Tory in this election, 'The Conservatives have mainly looked after the rich' was the third most popular answer. When we asked those who said they would never vote Conservative again, it was the top answer. This was even more true of lower-middle and working-class voters, who are more likely to say the party 'looked after the rich' than professionals, who objected more to the Tories' incompetence than their values.

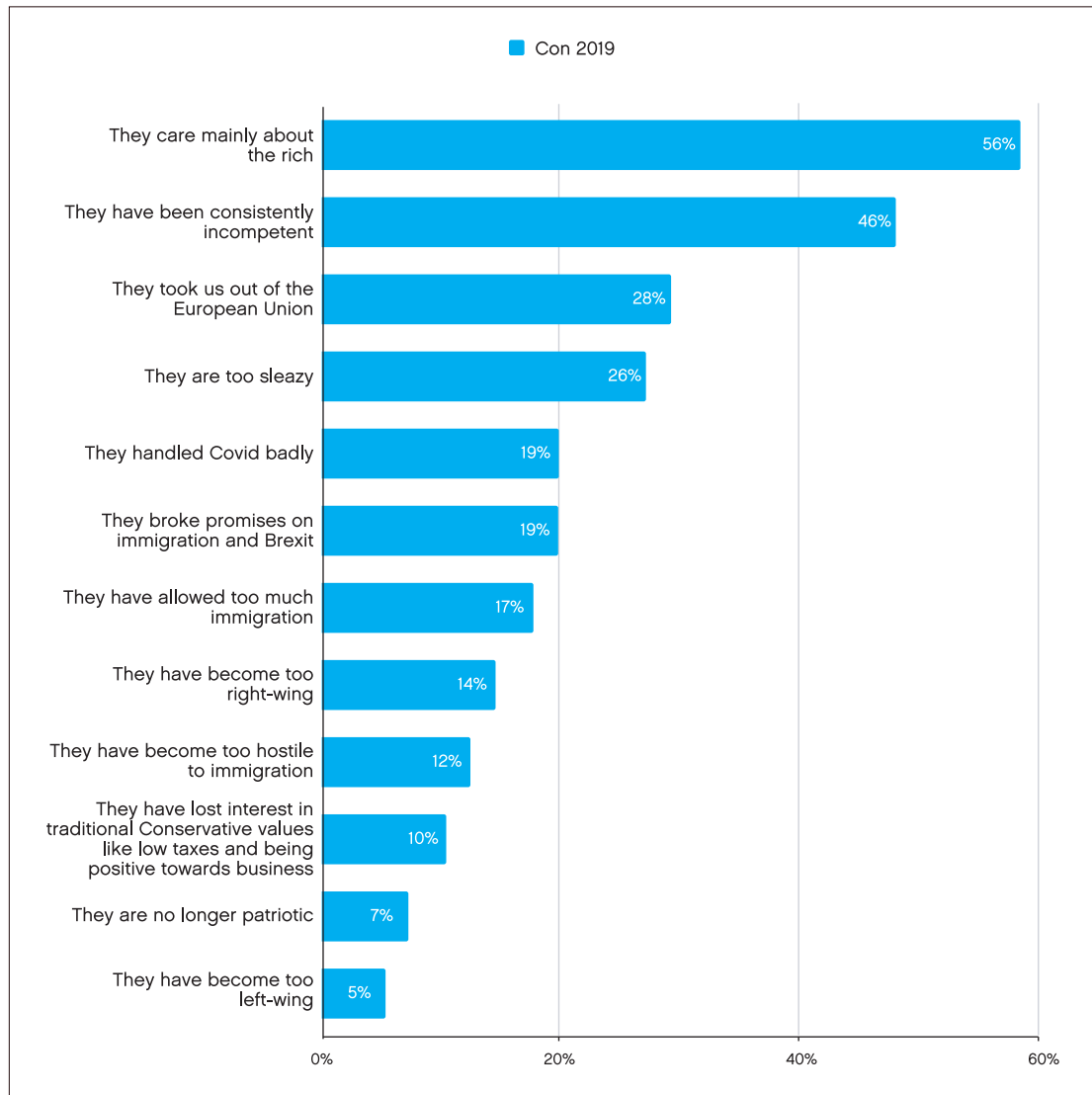
2019 Conservative voters by social class



2019 Conservative switchers by social class



You said that you would rule out voting for the Conservative Party ever again. Which of the following reasons best explains why? Select up to three of the following



The view from the streets

In our immersive research, we found similar themes in all three constituencies we visited. One small business owner and Armed Forces veteran, who had voted Conservative all his life but was now voting Reform, felt the party had lost touch with ordinary people.

'With me being ex-military [I have always voted Conservative], but just over the last decade they've become appalling. They have lost touch with the common man.' – **Man, 50s, Don Valley**

In Guildford, a middle-aged man who was planning to vote Liberal Democrat felt the Conservative Party was too concerned with the interests of the wealthy.

'Generally speaking, I feel like the Conservatives, obviously, have always tried to look after the most affluent people in society. And I think this is part of the problem, because obviously, you're dealing with such a minority of the country. And there's a lot of other people that are affected by day-to-day issues that they're not looking at.' – **Man, 40s, Guildford**

A middle-aged woman in Guildford, who previously voted Conservative and felt she was being forced to vote Liberal Democrat for the first time, thought the party was dominated by elites and too focused on prioritising their interests:

'I think they're too busy looking after themselves, looking at their own careers, and jockeying for position. I also think too many of them are sort of ex-Oxbridge, straight into politics and haven't had much experience outside. They really are out of touch with reality. A lot of them. I'm not saying there aren't absolute gems in there. But you know, the Boris Johnson mob and that lot that have been in the Conservatives, they've just been looking after their own back, and really, without any thought of the general good.' – **Woman, 50s, Guildford**

This point was echoed time and again in our conversations – with Rishi Sunak's personal wealth regularly brought up as the first thing people would say about him or the party.

'I don't even care about Rishi to be honest, he hasn't got a clue what real life is like. They all come from a rich background don't they, so [compared to] the average working-class person, they're not in touch.' – **Man, 50s, Swindon**

'Sunak is worth £700 million. He's lost touch. He's not in touch with the man on the street. He lives in a dream world, you know, he is crooked.'
– **Man, 60s, Guildford**

'You know, Rishi is all right. But he's not down with the people, is he? His wife is mega mega rich. She's like a multi-millionaire or something. And so I don't feel as though he relates to your average British person. I mean, I know he's got two young daughters, but come on he's mega rich. I just can't see him relating to people and I think he's put a lot of people's backs up with this D-Day celebration thing by coming home early. I mean, I can see a lot of people won't vote for him on that basis.' – **Woman, 60s, Swindon**

In Swindon, a retired business school lecturer, who was a lifelong Conservative but committed to abstaining in the upcoming election, was angry with the party's performance during Covid and the after effects of its economic policies.

'I've been a lifelong Conservative. Not lifelong; I was a rampaging, left-wing student! But most of my life I've been a sort of a Conservative supporter. We have a Conservative Party that is far less than conservative. Can you imagine a Conservative Party that handed out billions of pounds to people not to work during the pandemic, and created the culture of no work? We would have screamed blue murder if a left-wing government had done that. You would have said, 'That's outrageous what you're doing, printing all that money'. But a Conservative government, led by an absolutely incompetent Prime Minister, did it.' – **Man, 60s, Swindon**

What this means for the Conservatives

The Conservatives' post-mortem doesn't need drawing out; it's a simple exercise because what went wrong is so clear. Because of their failure to deliver on their policy promises, they became viewed as an incompetent party for the rich.

In turning the party's reputation around, you wouldn't, as the old joke goes, want to start from here. It would have been immeasurably easier to have begun to change the party's reputation while in Government – where legislation, regulation and fiscal action could have been used to prove the party was changing. In Opposition, things are more challenging; changing your reputation depends on perception, even if it's possible to use, for example, successes in local government along the way.

Our headline findings do show that, despite the Conservatives' abysmal electoral situation, there is still a glimmer of hope. There is still a cohort of voters who are prepared to vote for them if they get their offering right.

The lesson of defeat is that the party needs to focus on developing popular, credible, detailed, costed policies on the key challenges facing the country – and above all, show voters that it has learned the lessons of its previous failures. But where, as part of that effort, should it focus?

Chapter 2 – Who are the Conservative tribe?

In the polling for this report, we asked a large number of voters whether they could ever see themselves voting Conservative. Some 48% of them said they could not. For those trying to rebuild the Conservative Party, that leaves an immediately addressable audience of roughly half the electorate. Reaching a majority from that position may seem like a tall order. But it was striking that only 18% of Tory 2019 voters told us they had rejected the party completely – far lower than the proportion who failed to turn out for Rishi Sunak, or chose another candidate when they did.

Any Conservative revival must start by understanding the preferences of this tribe. But simply understanding their preferences is not enough. The job of politicians should not be to parrot the voters' preferences back at them. It should be to make the country a better place. Indeed, one of the main charges against the Tories over the last 14 years is that they focused too much on the short-term preferences of the focus groups, and not enough on the long-term needs of the nation and economy.

‘It was striking that only 18% of Tory 2019 voters told us they had rejected the party completely’

The focus of the next four chapters, then, will not just be on how to put the Conservatives back in power. That is not the job of a think tank. It is to set out the framework for a Conservative agenda that could simultaneously win back power and make useful changes to the country once power was regained. For example, economic growth ultimately depends on a reduction in the size of the state and for the government to stop trying to solve every problem under the sun. Likewise, the NHS needs fundamental reform – not least given the demographic pressures recently set out by the Office for Budget Responsibility. However, this in particular is an area where the public hears the word ‘reform’ – coming out the mouths of people they’re already sceptical about – and great fears emerge. You have to be realistic about what can be achieved in politics; getting into power requires public support and reforming anything serious requires public consent.

In the remainder of this chapter, I take a look at the broad state of public opinion on those issues Conservatives have traditionally cared about, using Conservative 2019 voters – the broadest mass of sympathetic voters the Conservatives are likely to attract in the medium-term – as the basis of measurement. I look at what differentiates them from Labour voters, and the differences between those who stayed with the party in 2024 and those who left (which are, overall, strikingly small). Then in the three subsequent chapters, I examine the various policy areas that a new Opposition might focus on – those where winning over voters to good policy should be relatively simple, those where it’s possible but complicated, and those where it’s incredibly hard and maybe even impossible.

Conservative 2019 voters – what are their priorities?

The most important thing to say is that the priorities of Conservative 2019 voters and the population as a whole are not usually terribly different – with the substantive exception of immigration (which we know, has gone up further as a concern since this polling was conducted, and could conceivably become even more of a priority).

That means, in the short term, Tory 2019 voters care first and foremost about the NHS – a huge driver of public spending increases. They are much less bothered by economic growth, and certainly don't see defence or cutting the debt as major priorities.

On tax, things are more complex. In our extensive research, here and elsewhere, we find the public do want lower taxes. But they also doubt any party will ever deliver them. And they worry about taking any steps at all which might restrict the flow of money into the NHS, which they are struggling to access for GP and routine hospital appointments.

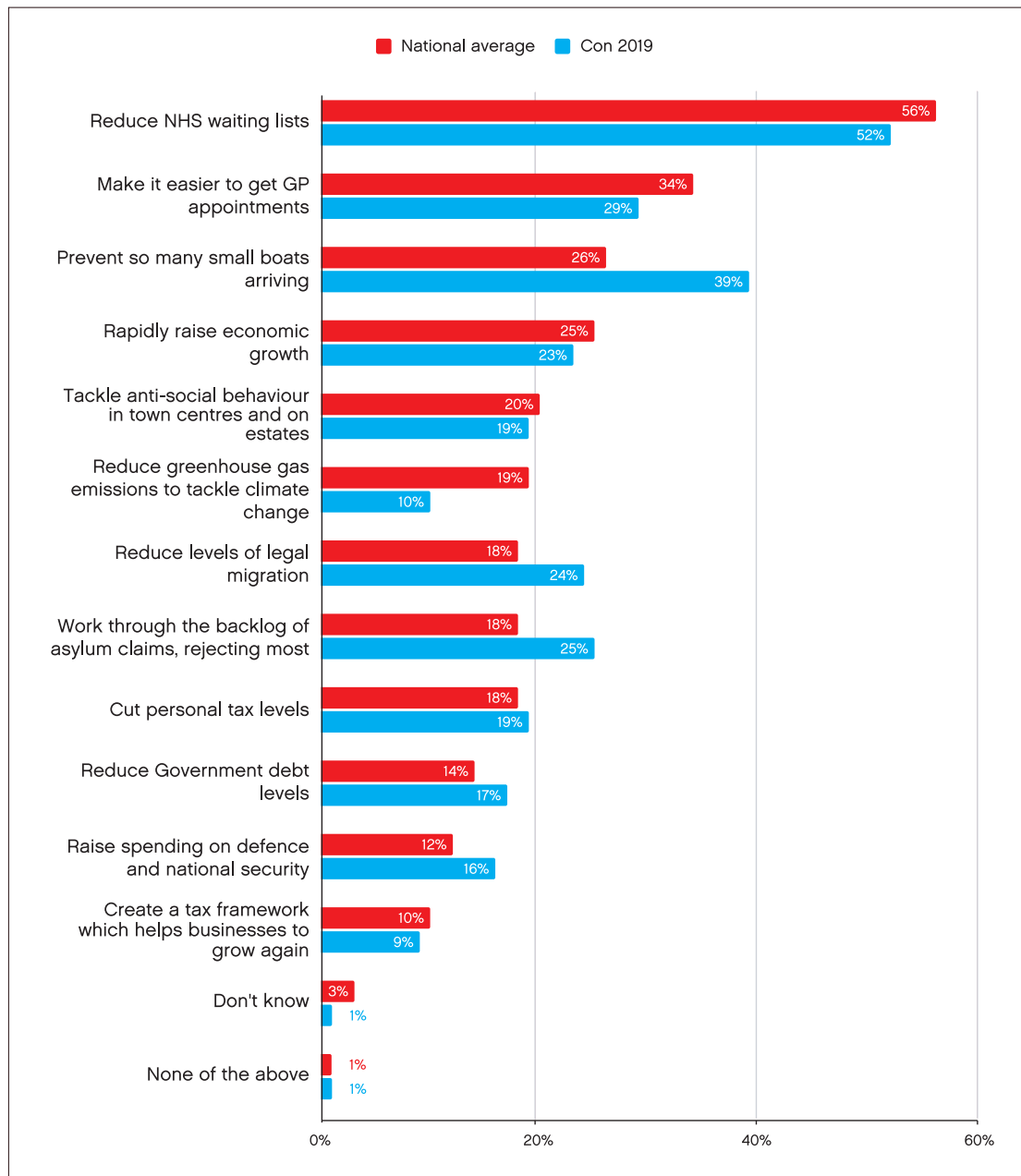
‘In the short term, Tory 2019 voters care first and foremost about the NHS. They are much less bothered about economic growth, and certainly don't see defence or cutting the debt as major priorities’

To be fair, opinion on tax, debt and sound money changes all the time. After the financial crisis in 2008, there was widespread concern about Labour profligacy and a belief the Government needed to cut debt. While left-leaning commentators talk as if the Conservatives were unpopular in this period because of their commitment to austerity, they won in 2010 and 2015 precisely because they seemed to have a commitment to sound money and ‘living within our means’.

Take another example: shortly after the Brexit referendum, amid wall-to-wall coverage of the prospect of multinational businesses leaving Britain – and taking tens, if not hundreds, of thousands of jobs with them – there was a surge in sympathy for large businesses. There was even widespread sympathy (rather than enthusiasm) for cuts in business taxes.

It's conceivable that a downturn in the economy – borne of Labour economic policies – could change public opinion on these issues. We write this document just ahead of the 2024 Budget, where a series of major tax rises on businesses are expected. If some international businesses start scaling down operations in the UK, or if it becomes significantly harder to attract top business talent to the UK, we could see a similar shift towards the priorities and concerns of business. But for the moment, business is not at the top of Conservative voters' priority list. Indeed, many of them are just as suspicious of big companies as the rest of the public.

Which of the following challenges facing Britain in the short term do you think the next Government should prioritise? Select up to three



Conservative v Labour voters

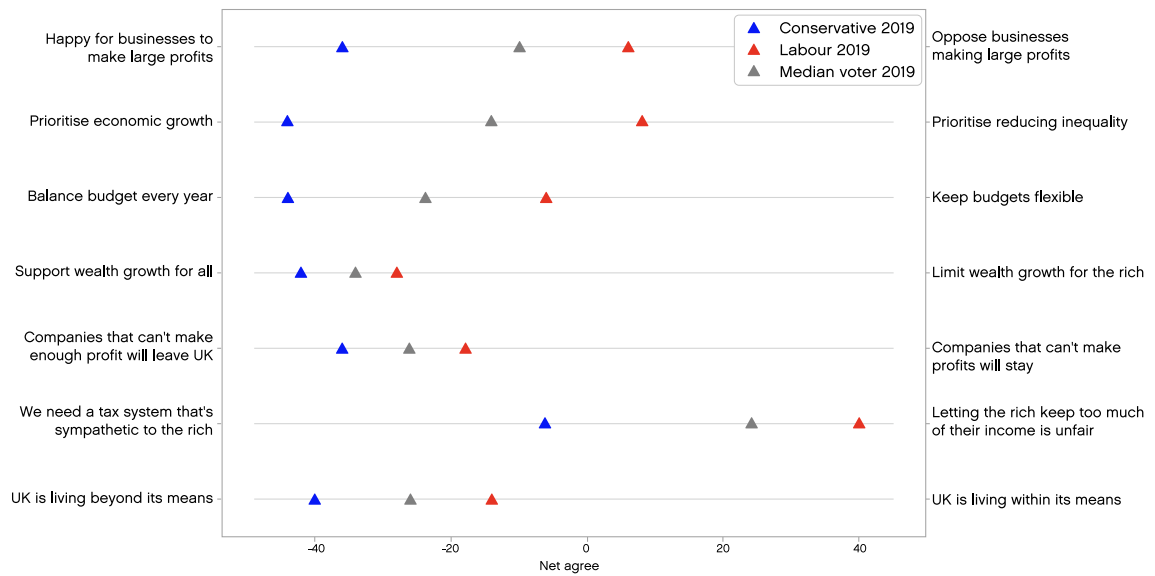
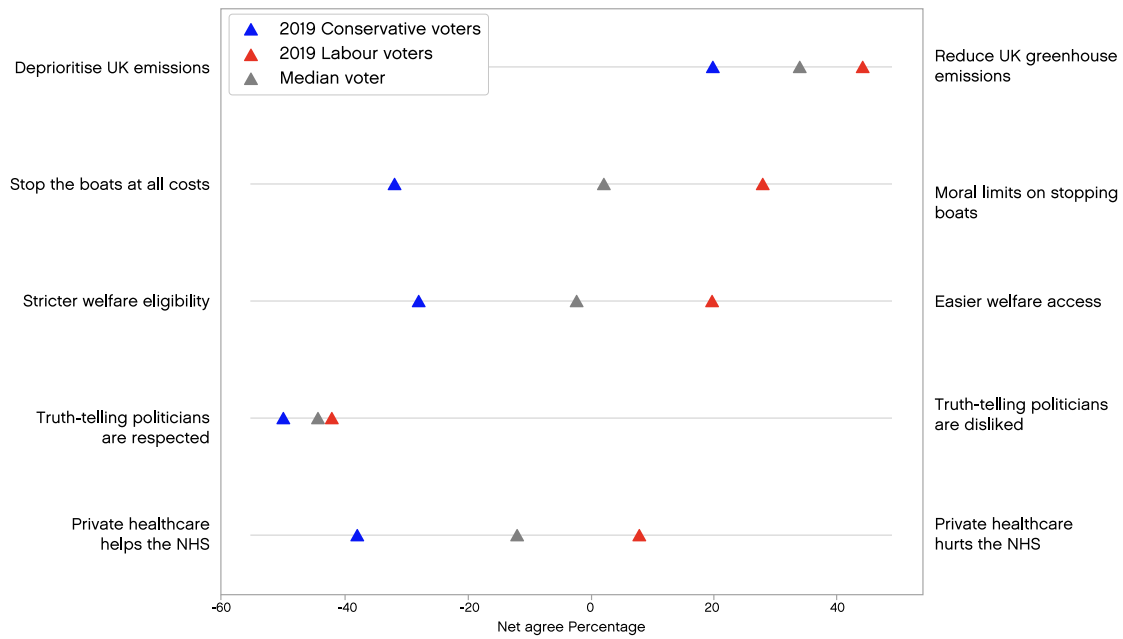
We said above that Conservative 2019 voters' current interests are closely aligned to the rest of the general public. But when you compare them to those who voted Labour that same year, there are massive splits on forced-choice questions over social issues and public services. This is particularly obvious in:

- Welfare, where Conservative 2019 voters are much more likely to agree with the statement (a) 'We should be stricter with tests for people to claim welfare, in the knowledge that this might mean some people might unfairly suffer because mistakes were made', rather than (b) 'We should not be stricter with tests for people to claim welfare, because we should not want even a small number of people to suffer unfairly because mistakes were made'.
- Illegal migration, where Conservative 2019 voters are much more likely to agree with the very hard-edged (some would say outright unacceptable) statement (a) 'We must do whatever it takes to stop small boats arriving, even in the knowledge that we might raise the risk of serious injury or even death to some people trying to come here', rather than (b) 'While we need to stop small boats arriving, we might need to accept that we simply can't, because there are some things we simply cannot morally do, like turn back boats in the middle of the English Channel'.
- Attitudes to the NHS, where overall prioritisation for the NHS is very high for all voters, and Conservative voters want much more money to go into it, but Conservative 2019 voters are much more likely to see private healthcare as a good for the NHS. ('The private healthcare sector is good for the country because it reduces patient pressure on the NHS'.)

‘There are many things on which traditional Conservative and Labour voters just fundamentally disagree – decolonising the curriculum, for example’

We should note, we see fewer splits on the environment (which also remains quite a significant priority for Conservative 2019 voters). Many right-leaning commentators have talked in recent times as if there was major public opposition to Net Zero and broader 'environmentalism', but it just isn't there. We have done many dozens of focus groups on this issue and have found working-class voters particularly have become more positive towards Net Zero in recent years as concerns about climate change and environmental damage increase. (We explain more on this in Chapter 4).

Once you convert those values differences into specific policies, it becomes clear that there are many things on which traditional Conservative and Labour voters just fundamentally disagree. Look at the gap on 'decolonising the curriculum', for example. Differences on inheritance tax and migration are also extremely striking.

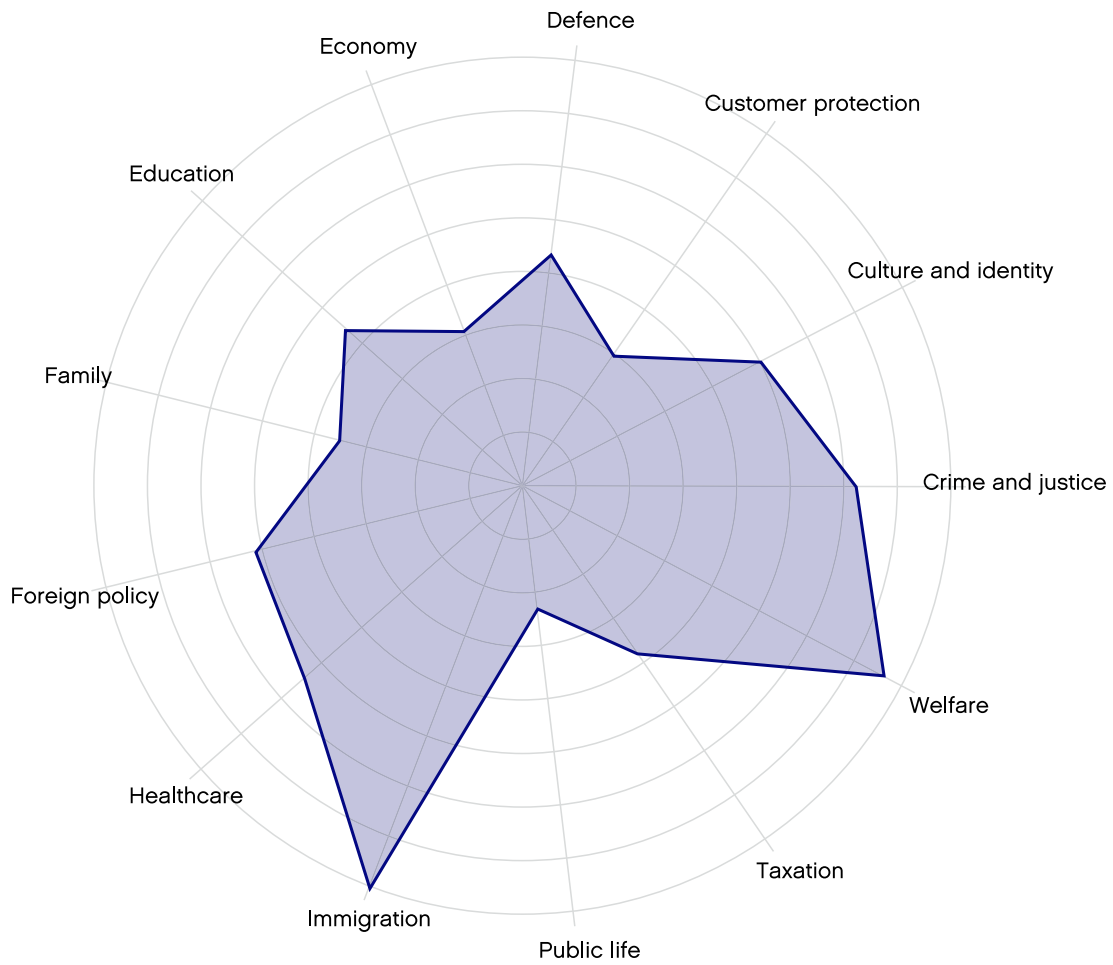


Policies with largest priority difference between Conservative and Labour voters



Mapping this by policy area, it becomes clear that on these social issues – crime, welfare and immigration – there are both very large differences between Labour and Tory voters, and a very strong sense in which those Tory voters are closer to the rest of the nation.

Differences in policy preferences between Labour and Conservative voters by policy area



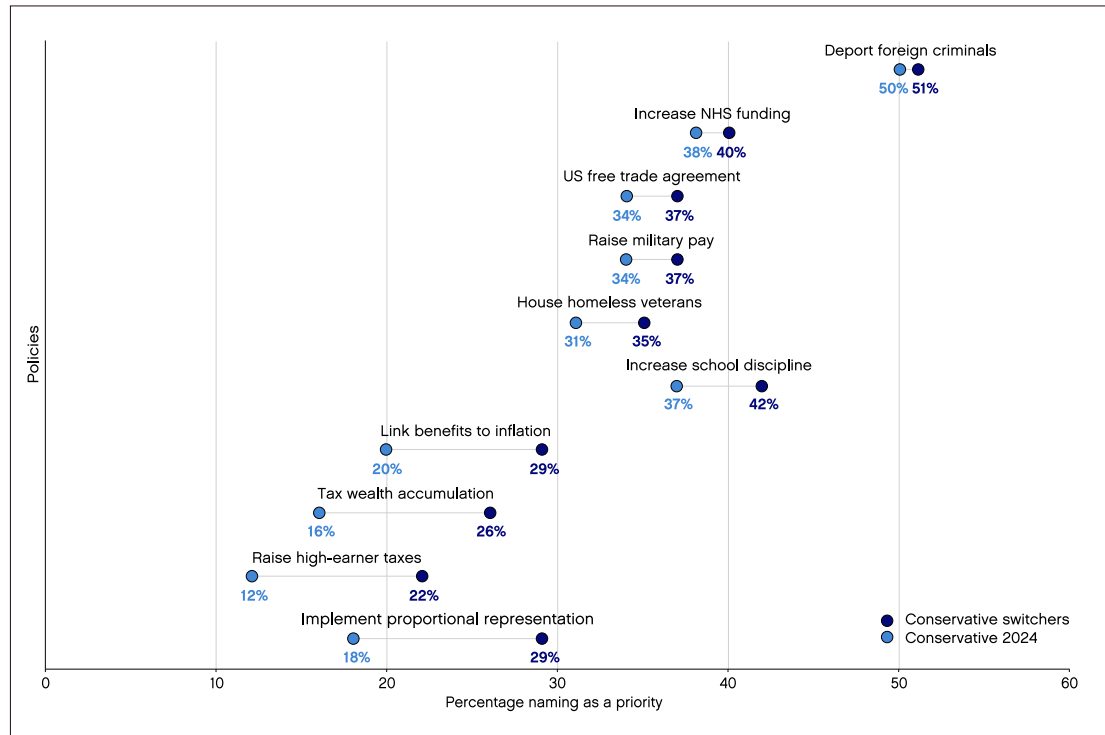
Note: Each axis represents a policy area. The distance from the center represents the magnitude of the difference between Labour and Conservative voters' preferences for that policy. The further a point is from the center, the greater the difference in preference between the two groups.

Conservative switchers v core Conservatives

But there is another core point, and one from which Tory strategists can take comfort. If you map the differences between those who stayed with the Tories in 2024 and those who left, they are far, far smaller.

The graph below shows the differences between 2019 Conservative voters who stayed Conservative in 2024, and those who didn't. As will be obvious from the graph, even the most divisive policies within this group are not very divisive.

Policies with largest priority difference between Conservative loyalists and switchers



There is one partial exception to this rule: attitudes to wealth. Those who left the party tend to be more in favour of punitive taxation on the rich and wealthy. This underlines the point, made earlier in the document, that being a 'party for the rich' put certain voters off substantially.

But broadly speaking, these differences are small. Put another way, it is highly likely that those policies which appeal to the voters the Tories lost will also appeal to the voters they kept. Nor does there seem to be a major values or policy divergence between those lost to Labour and the Liberal Democrats and those lost to Reform. In other words, it should theoretically be possible to devise a policy agenda that satisfies all parts of the potential Tory coalition.

Mind the age gap

There is another caveat here. There isn't a huge difference in attitudes between different social groups on most of our questions – although lower socioeconomic groups were less likely to blame generic incompetence for the Conservatives' failings, and more likely to attack them for being a party of the rich and for their failures on immigration. However, there is unquestionably a split between those under 35 and those over 35, even among former Conservative voters.

- Under 35s are unquestionably more liberal on all cultural questions;
- They are also more pro-regulation, more in favour of government over business, and less persuaded the state is living beyond its means;
- However, they remain in favour of economic growth and indeed care more about tax than about the NHS relative to older Conservative voters.

This, in other words, is an area where there is a real choice to make. It is a truism that the Tories need to win younger voters. But policies targeted exclusively at bending the Conservative age curve down to people in their late thirties and forties would have a cost at the other end, in a way that is not true of (for example) tough policies on immigration, crime or welfare. In my view, abandoning cultural conservatism (for want of a better phrase) in a hunt for young voters would be madness, but it is a legitimate choice the party could make.

‘There is unquestionably a values split between those under 35 and those over 35, even among former Conservative voters’

Conservative policies and principles

Given the make-up of its potential electoral coalition, which policy areas should the Conservative Party focus on as it seeks to rebuild?

To some extent, the policies choose themselves. The party obviously must talk about things that are politically dominant – the ones in the news media and those discussed by politicians in Westminster and Whitehall.

But it's not so simple: the Conservatives must consider themselves an alternative Government, not just a campaigning organisation or a set of high-profile political commentators. As such, they must create a policy platform to enable them to govern the country, improving its prosperity and wellbeing.

Answering this question therefore relies on three different considerations:

- a) What are the biggest challenges facing the country?
- b) What type of policies do Conservatives think work best?
- c) Which of those policies will the public support, or at least tolerate? And if they disagree, how easily could they be persuaded?

Building a policy platform

As we noted in the previous chapter, the Conservatives' main policy failings at the last election were on healthcare, the economy, and border control. The party has to have important things to say about these issues.

On healthcare, they must say something about how they would improve access to GPs and reduce waiting lists for routine hospital appointments. On border control, they must say how they would stop the boats and work through the backlog of asylum claims; they must also say how they would reduce legal immigration. On the economy, they need to explain how they would boost growth and keep inflation down.

Of course, these are easier said than done. Being convincing on these requires specificity on a number of related issues: public sector funding, individual and corporate tax rates; human rights laws; planning regulations; and so on.

‘On healthcare, they must say something
about how they would improve access
to GPs and reduce waiting lists for
routine hospital appointments’

Yet as an alternative Government, the party needs to have a significantly broader policy platform, going well beyond these issues. More to the point, it needs to have a sense of its own political philosophy, and how it will apply that philosophy to the challenges facing the country.

The list below, then, combines this extensive opinion research over the last few years with the Centre for Policy Studies' equally extensive policy work. It represents a list of areas where, we believe, the Conservatives need to have solutions for the country's problems, and to persuade the voters of their merits:

- **Healthcare**
 - GP access
 - Waiting lists for hospital treatment
 - NHS productivity and efficiency
 - Waste
- **The economy**
 - Economic growth
 - Helping small businesses
 - Planning and infrastructure
 - Individual tax rates
 - Corporate tax rates
 - Business regulation
 - Inward investment
 - Helping start-ups and scale-ups
 - 'Levelling-up' and high streets
 - Public sector waste
- **Border control**
 - Stopping small boat arrivals
 - Housing asylum seekers safely and cheaply
 - Controlling regular migration
 - Lowering overall migration while encouraging continued high-skilled migration as part of a more selective system

- **Public services**
 - Fair public sector pay
 - Greater public sector efficiency and reduced waste
 - School standards
- **Building stable families**
 - Access to affordable, local housing
 - Access to affordable, local childcare
 - Enabling families to pass wealth between members
 - Enabling families to care for each other
- **Welfare reform**
 - Making sure work pays more than welfare
 - Getting people off long-term sickness benefits
 - Improving mental health and mental healthcare
- **Crime and justice**
 - Ensuring enough prison spaces
 - Tougher sentences for the most serious crimes
 - Fair justice for all
- **Defence**
 - Well-funded, well-trained Armed Forces personnel
 - Fulfilling our responsibilities as a Nato member
 - Building alliances around the world with countries with similar values
 - Ensuring a good standard of living for Service personnel and their families (including veterans)
- **Protecting liberal values**
 - Protecting and promoting free speech
 - Combating the excesses of 'political correctness' / 'wokeness' in public life and institutions

In the rest of this document, we look at where public opinion is on these key issues, dividing them into three categories: where the voters are close to where we would hope they would be; where they are indifferent to traditional Conservative arguments; and where they are actively suspicious of what the party has traditionally stood for.

Chapter 3 – Areas of alignment

In the wake of the 2024 election, people have argued that the 2019 Conservative coalition – broadly speaking, of working-class, provincial Leave voters and middle-class, Southern professionals – is no longer viable. On the contrary, we found that there are still extremely strong areas of agreement between both wings of this coalition, in particular over social and cultural issues. Often, the problem is more that both groups disagree with what they believe the Tories stand for, or with policies the country might actually need.

In these chapters, we fuse analysis of quantitative and qualitative research to give a more rounded sense of what the public think about these issues. As explained above, this research involved a poll of 4,000 people and immersive research exercises in Don Valley, Guildford and Swindon.

‘Given the current toxic reputation of the Conservative Party, our polling asked voters to imagine a new, untainted party which they might hypothetically be tempted to support’

Given the current toxic reputation of the Conservative Party, our polling asked voters to imagine a new, untainted party which they might hypothetically be tempted to support. We also, crucially, asked them which policies they would least object to as well as those they would most support, in order to estimate the scope for a future Conservative Government to do things which it felt were necessary, but which might not be popular. This is an important difference; it helps to know which policies the public are enthused by and which policies they'd tolerate. In power, this latter group is particularly important; when you move from campaigning to government, it's often about pushing through hard choices.

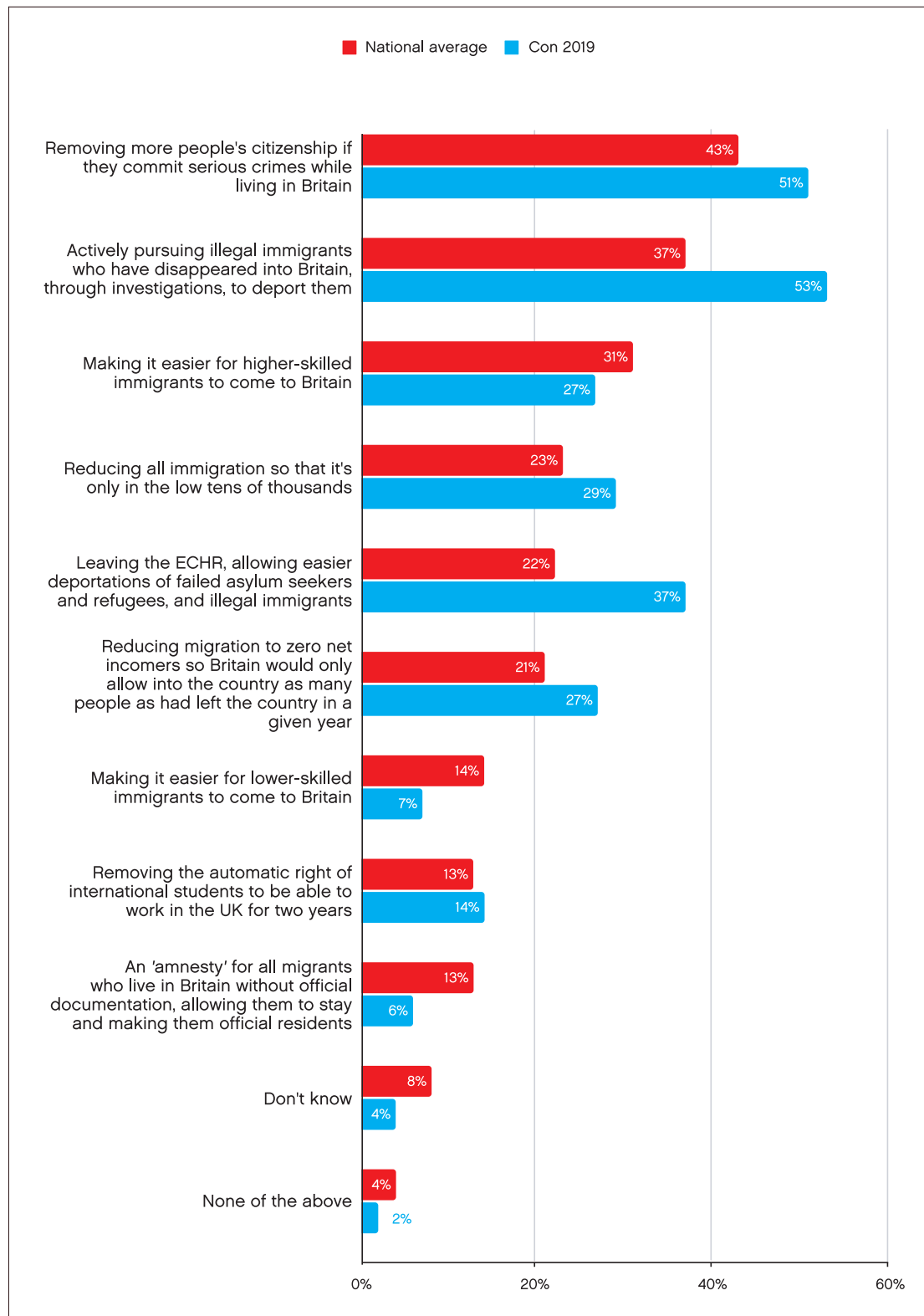
We will start by looking in detail at those areas, highlighted above, where the Conservative 2019 coalition is most in tune both with itself, and with policymakers: border control, welfare, crime and – in broad terms – the family.

Attitudes to border control

There is (nearly, but not quite) no limit to the toughness of our 2019 coalition's views on border control. For example, in our values question, voters as a whole were split 50-50 between the propositions 'While we need to stop small boats arriving, we might need to accept that we simply can't, because there are some things we simply cannot morally do, like turn back boats in the middle of the English Channel' and 'We must do whatever it takes to stop small boats arriving, even in the knowledge that we might raise the risk of serious injury or even death to some people trying to come here'. However, Tory 2019 voters divided two thirds for the latter, and one third for the former. They were also far more likely to choose immigration as the most salient issue.

Of course, risking the lives of those coming to the UK in small boats is not morally acceptable, regardless of the polling or anything else. We include the question to show that most voters want the party to dramatically toughen its approach to border control. Clearly, the Tories have to come up with firm, workable plans, but very much within the realms of decent behaviour. (For what it's worth, I also doubt that the polling here is entirely accurate; when it comes to actually risking people's lives, most people would not ultimately retain the hostility they demonstrate rhetorically.)

Which of the following policies on migration and border control would you most want any party to offer in future elections? Select up to three



Regardless, improving border control and cutting both legal and illegal immigration are popular policies not only on their own terms, but seen through the prism of other policies too. For example, for 2019 Conservative voters:

- Deporting foreign criminals was the top crime policy;
- Introducing new laws saying benefits could not be accessed by any new arrivals to the UK for a decade was the top welfare policy;
- Asking patients to provide photo ID before treatment to show they are UK residents was the top health policy.

Again, this is not to advocate these policies specifically, but rather to point out that better border control is a policy that unites past and current Conservatives.

As we note above, when it comes to it, and people are tested on border control and broader immigration policies, they demonstrate greater nuance; they want policies that will work, can reasonably be implemented, and that are just.

For example, one hardline proposal in our focus groups and immersive work got a mixed response – which was when we tested the policy pushed by Nigel Farage’s Reform of reducing net migration to zero.

Our qualitative research – run in places where established and new Tory voters are found in great numbers – found that while the public certainly wants overall numbers to decrease drastically, there was some scepticism, mainly among women, about the practicality of a strict ‘one in, one out’ policy. It was also the least popular migration-sceptic policy we tested.

‘Net zero migration? So that’s migration and immigration, cancelling each other out? I don’t think that’s practical.’ – Woman, 50s, Guildford

‘I don’t think humanely we can do that, really, because there’s people just looking for a better life and escaping wars and droughts and all sorts. So whilst I agree to a cap, which is what the Tories have supposedly got in place, I think that zero wouldn’t wouldn’t be feasible.’ – Woman, 40s, Guildford

A woman working in a children’s shop in a leafier part of the constituency also raised her concerns about the impact on the economy.

‘No. I think it’s a difficult one because we need migration for economic reasons. We don’t seem to be able to train enough people to do a lot of the work that migrants want to come in and do. Or it’s the fact that it’s the only sort of job that they’re offered. So we would struggle, if we said zero.’ – Woman, 50s, Don Valley

Another woman – who was concerned about overall levels of migration and wanted to see more control in the system – accepted the need for pragmatism when it comes to restrictions.

'The migration thing sort of really annoyed me as I'm sure it's annoyed a lot of people. I know we need skilled workers in this country. And we do have quite a lot in the NHS and whatnot, I suppose. Yeah. If they've got skills, I suppose we're going to have to allow them in.' – **Woman, 50s, Swindon**

Others, such as a middle-class woman working in a charity shop, said they were as concerned about the type of migration coming to the country as much as they were about overall numbers.

'Don't let any more in ... I mean, we've got a huge emigration population. People don't realise how many people actually emigrate from England. But you know, it's okay with them all going out, but for me, I shouldn't say this, we're inviting the wrong sorts of people that are coming in. They're not working. They are taking up houses that could be used for ex-Army people and people that are on the street for no reason, you know, through not their own fault. And they're not working and they're not contributing ... the kids are running around.' – **Woman, 50s, Don Valley**

Even then, though, some were more in favour. A construction worker in Guildford agreed with a net zero migration target and an end to visa-free travel because he believed it would lead to an increased focus on who is coming in.

'I totally agree [with a Net Zero migration policy]. All immigration should be done on a visa system like it is done in the US or Australia.'
– **Man, 40s, Guildford**

And there were some (mainly men) who felt that a 'one in, one out' target did not go far enough.

'Well, yeah, no more migration. Either a moratorium of, say, five or ten years. And that gives us time then to clear out the flotsam and jetsam, so to speak.'
– **Man, 50s, Don Valley**

'I think we need to get immigration down drastically. Not even zero, but below zero. Because it's just nothing's working, is it? Hospitals aren't working, you can't get a doctor's appointment. I'm not blaming the migrants, because everybody wants a better life.' – **Man, 50s, Don Valley**

Crime and justice

We conducted this research during the election campaign, and therefore before the riots. However, even then, it was clear that many people felt Britain was effectively lawless.

Crime was singled out as a particular problem in Don Valley. As one woman in a charity shop explained, crime and vandalism can be incredibly depressing for local people – making a local community feel unsafe and neglected. Again, in many people's minds this was tied to migration (rightly or wrongly).

'There's not enough for the children to do. There are parks, but they're not locked at night. So it's just full of youths. There's no youth clubs for them. And no safe spaces. And there's a lot of crime around as well. A lot of stolen cars [are] getting vandalised and stolen.' – **Woman, 40s, Don Valley**

'Policing [is something politicians are not being honest about]. We need more on the beat and walking about. I've seen them [police patrols] in the last few weeks. Okay, maybe months. They have been walking about in twos. We get a police officer and a PSO walking around. Just to kind of cut back on a bit of crime in the town. But the biggest thing in Doncaster at the moment is shoplifting. Really, when somebody can walk out of a shop with a handful of meat, I mean, what is happening?' – **Man, 70s, Don Valley**

'The biggest challenge [facing the country] is crime. The state of our towns and cities or wherever. Too many immigrants. Yeah. I don't want to be racist.' – **Woman, 60s, Don Valley**

'Security [is the biggest challenge facing the country]. But home security is tied to immigration, isn't it?' – **Man, 40s, Swindon**

'I wouldn't go in there [Swindon's town centre] at night, certainly on my own definitely. Simply because of reports in the papers, it's full of crime and drugs and one thing or another.' – **Woman, 40s, Swindon**

In the focus group in Don Valley, one participant said he did not trust politicians to get to grips with serious offences such as knife crime.

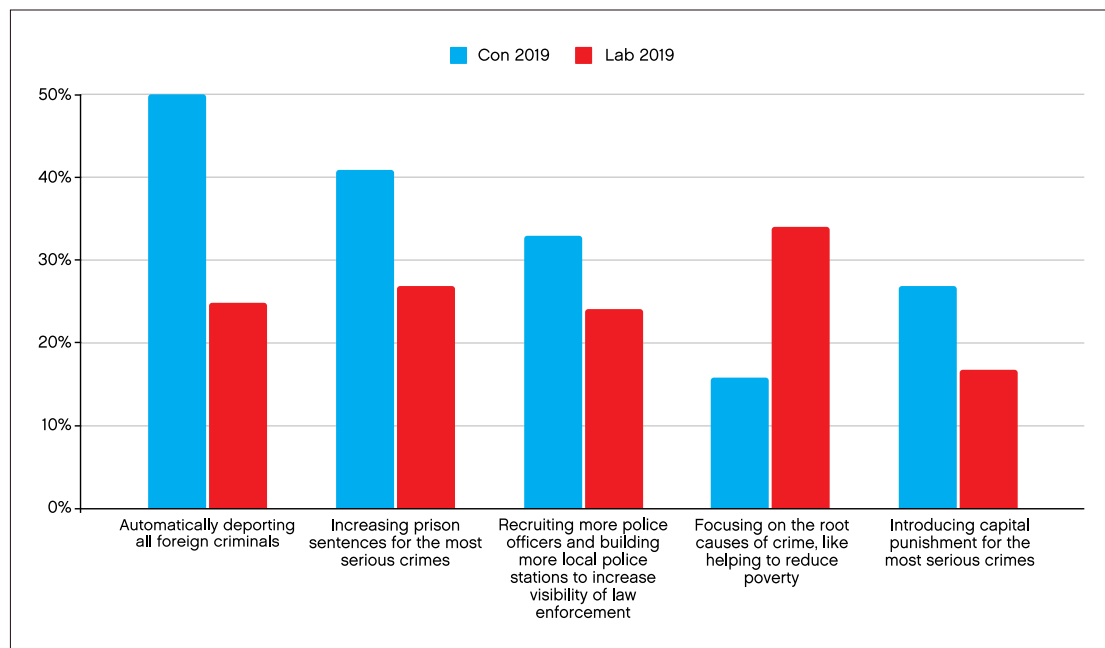
'I think it was Labour that said, I'm not sure and I could be wrong because it could be Conservative, that if they get in they will sort knife crime out. They'll never stop it. It's never gonna stop.' – **Man, 40s, Don Valley**

While in Swindon, people argued that anti-social behaviour and crime was contributing to the decline of the high street.

'I think antisocial behaviour is a big issue [in Swindon]. Personally, there seems to be little respect for the law anymore.' – **Man 60s, Swindon**

Conservative 2019 voters want a tough response – more prisons, more police officers (and even some support for capital punishment). Unlike Labour 2019 voters, they are relatively uninterested in the causes of crime.

Favoured crime policies by 2019 vote



But it's not just 'conventional' crime that makes Britain feel lawless. The endless protests in our towns and cities – on a whole manner of issues, many of which feel completely removed from the lives of the people who live in the places the protests occur – feel draining. Increasingly, we have heard complaints that the police seem to have given carte blanche for protestors to close roads on a whim. Similarly, to many, it can appear as if the courts are letting off those who engage in criminal damage if they claim to be following some higher political cause.

'You see it [i.e. wokeness and political correctness] in everyday life. It's just people with no discipline. And then we've [not] had the right to speak out and put these people right. So look at all these stop oil protesters, they wouldn't do it in China or Russia. It's just because we've got so PC now. You can't speak out against what's right and wrong.' – **Man, 50s, Don Valley**

Strikingly, in our polling, 51% of Conservative 2019 voters supported banning political protesters from disrupting traffic, against just 17% of Labour 2019 voters.

Welfare reform

The third area on which there was a sharp divergence between Conservative and Labour voters on values was over welfare. In both our quantitative and qualitative work, there is a strong feeling – from lower middle-class and affluent working-class voters particularly – that too many people are living off the fat of the land without making any contribution themselves.

Rightly or wrongly, there has long been a sense that too many people are simply making up ailments to keep themselves on disability benefits, or that they're working just few enough hours to qualify for benefits – while other people are 'slaving away' all week to provide for their families. Outside an optician's, a man waiting for his wife thought the benefits system acted as a disincentive for some people to find work.

'I think the whole benefits system is broken because people get trapped in it. Because they can't take the job risk.' – **Man, 50s, Don Valley**

Similarly, a shop worker in Don Valley also raised her concerns about how the benefits system was more generous than some jobs.

'My only opinion on benefits is that if you're working full time, you should have more money than somebody that chooses not to work. They [people in full time work] get less money than people that are staying at home, who are capable of working. Benefits should be there for people who aren't able to work.' – **Woman, 40s, Don Valley**

This sentiment was echoed by another woman who worked for a professional services firm in Doncaster.

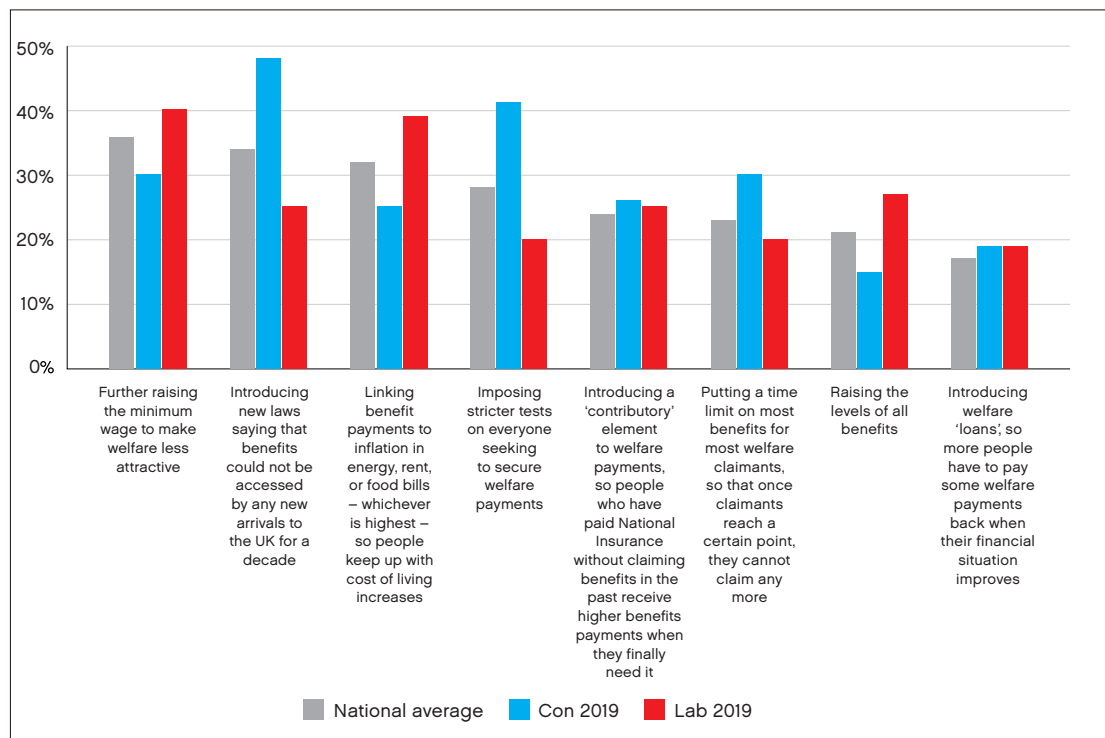
'I've got friends who are disabled, but could work. They definitely could work, but don't need to work because they get more on benefits than they would in a minimum wage job. They would end up worse off, so what's the point?' – **Woman, 40s, Don Valley**

Some people felt giving cash payments should be switched for vouchers.

'If you are on benefits you shouldn't be able to go and buy cigarettes and booze.' – **Man, 50s, Swindon**

'Lots of people when they see people on benefits, but they've got a 60 inch TV with a top of the range Sky [TV] package, but some people are working. They're grafting. And I am not being horrible to people. But for the grace of God, it could happen to any of us, you know, but it must annoy a lot of people.' – **Man, 60s, Swindon**

Which of the following policies on welfare would you most want any party to offer in future elections? Select up to three



Of course, there is no doubt most welfare claimants retain public sympathy. In particular, in previous Public First/CPS work we found that the Covid pandemic and the cost of living crisis had significantly softened public attitudes to those on welfare and those living on the streets. During the focus group in Guildford, for example, there was some concern about the abuse of the benefits system, but participants also thought the system needed to be mindful of people falling on hard times.

'I absolutely agree with all those [policies to curb benefits]. But there's always people that are totally genuine. You'll have a lady with two kids and he walks out on her. She's going to need benefits. She can't work and you've got summer holidays and all that to consider. A friend of mine is in this state. That's what I know. And she's totally honest about everything, but there's an awful lot of people out there saying 'well I do it because I can' and that's so wrong.' – **Woman, 60s, Guildford**

However, there is continued anger that a minority of welfare claimants aren't bothering to try at all, and there remains more hostility to the existing welfare system among Conservative 2019 voters and less enthusiasm for raising the level of benefits. People across the board prefer supporting incomes through the minimum wage than through benefits. For example, focus group attendees in Swindon blamed low wages for incentivising people to remain on benefits.

'The [national minimum] wage needs to go up because then it makes it more beneficial for them to find a job or else they are trapped in a benefits trap. And yes, they're getting so much on benefits – so why would you go and do two hours a day in a cafe?' – **Woman, 50s, Swindon**

We also tested some sort of ‘contributory welfare’, again covered in previous Public First/CPS work. The idea is to give those who have always worked, always paid taxes and NICs, higher welfare payments when they finally call on the welfare state; these people should be rewarded for barely troubling the system at all.

In polling, this concept can be hard to convey, and tends to get muted support. In our immersive research, we found more enthusiasm.

‘Yes, I totally agree [i.e. with contributory welfare]. I totally agree. Because you get people that leave school that haven’t worked, and then on the higher rate benefit, and haven’t paid no tax. So I totally agree with that.’

– **Man, 40s, Guildford**

In Don Valley and Guildford, a few participants mentioned they have seen similar systems elsewhere in the world and thought they were a good idea.

‘In France, you can’t [get access to state services] if you haven’t paid into their system. And you can’t get it. You can’t get anything. There has to be an element of contribution.’ – **Woman, 40s, Guildford**

‘I’m all for it. I think in Germany, you can get about 80% of your wage in your benefit. Because they have got a different taxation system to us. But then, after I think about six months, it drops down. So you’re encouraged to get yourself back into work. Whereas here we’ve got people getting like, the equivalent of £30,000 plus in benefits and they are not working for it. Probably never worked for it.’ – **Man, 50s, Don Valley**

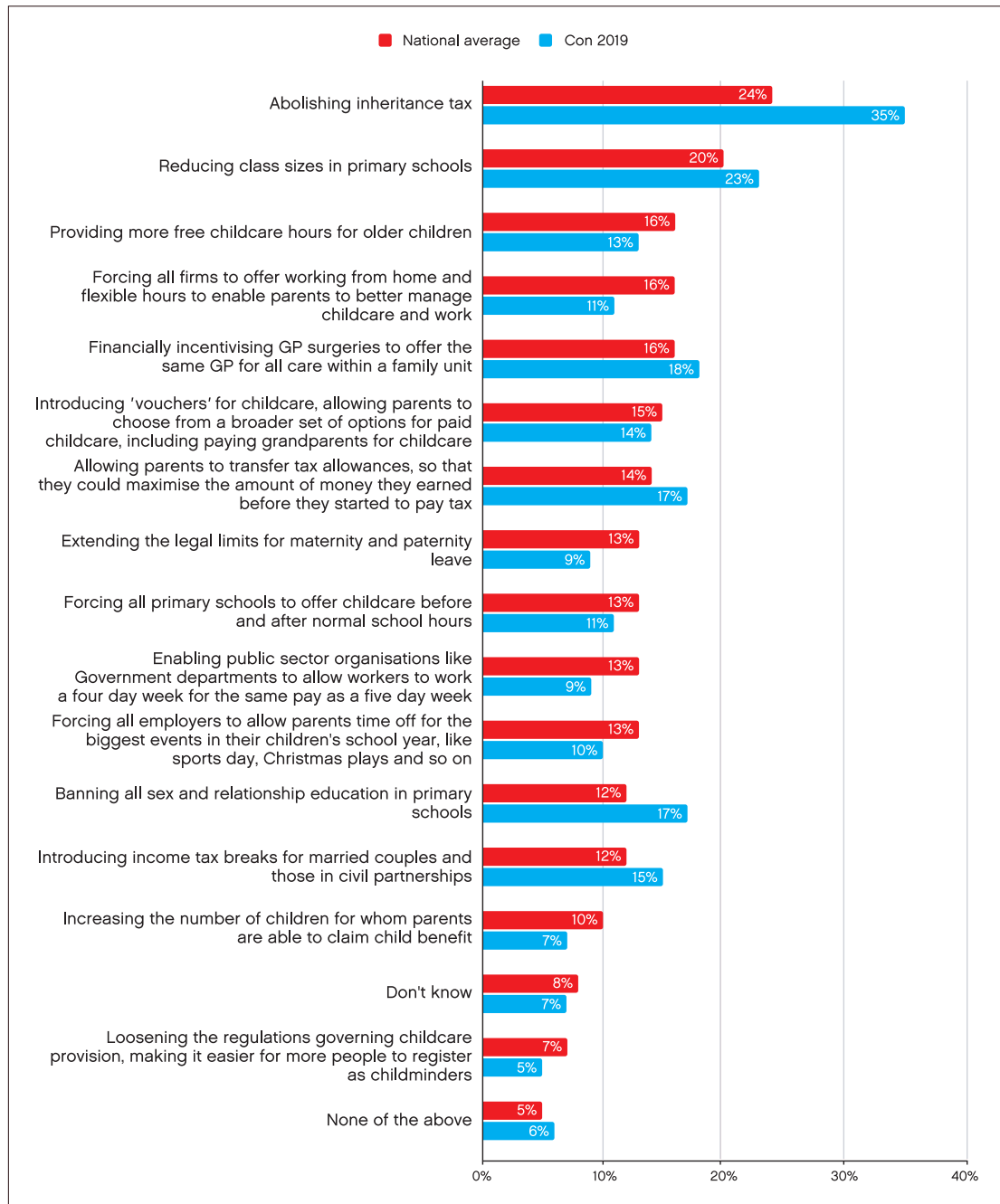
Building on our past research for the CPS, this suggests that there is significant space for a compassionate yet robust Conservative agenda on welfare that speaks to Tory supporters’ concern for those in need, their regard for those who have paid in, and their concern that too many are abusing the system.

Protecting family life

We know from previous work that there is immensely high support for the family in terms of values. In our Public First/CPS paper ‘The New Majority’, for example, family was the top ‘value’ people professed to prize – above fairness, hard work, decency, freedom, democracy and equality – not just for the whole population but for every part of the 2019 Conservative coalition.

However, in this research exercise, there was muted interest in most ‘classic’ family-related policies (including on tax and childcare). This may be because we didn’t test the right policies – and this is an area where we think more imaginative thinking is needed from Conservatives in the next few years.

Which of the following policies on the family would you most want any party to offer in future elections? Select up to three



This point is underlined by the most popular policy on 'family' we tested. Given a list of possible pro-family policies voters might support, by far the most popular was abolishing inheritance tax; this was especially popular among Tory 2019 voters. Elsewhere in the poll, given a list of 12 potential tax policies, by far the most popular among Conservative 2019 voters were launching a crackdown on tax evasion, and abolishing inheritance tax. There are also huge gaps on this issue between Tory 2019 voters and Labour 2019 voters.

As we will show further down, apprenticeships are such a popular policy partly because they are seen as offering people's children a great opportunity to develop a career (and to stay living locally).

This shows that there are policies which – when announced – resonate with the public precisely because they seem to strengthen family life.

On tax specifically, Conservatives remain of the view that you should be able to pass down savings to your children, regardless of whether they would themselves benefit from it. Nor is it only the wealthy who feel this way: there was little difference between how AB, C1/C2, and DE Conservative 2019 voters felt.

I have been tracking attitudes to inheritance tax for many years, going back to the mid-2000s. Over this 20-year period, people have always been hostile to it. Usually for two main reasons: first, because it felt unfair because people were paying tax on things they had (often) already paid tax on; second, because they found it offensive that you couldn't pass on money – amid the background of all the grief associated with death – to close relatives without a big tax bill.

For this reason, it has always been a tax opposed by many people *regardless of their own personal wealth*. We picked up a lot of this in our immersive research for this project.

'If it can be done [i.e. abolishing inheritance tax] then that would be a good thing. I'd like to add a comment on that one. 100 years ago, there was absolutely no allowance on death duties, you paid death duties on the entire estate. At least we've got a half a million, or thereabouts, allowance nowadays. If inheritance tax can be either abolished or the ceiling raised, massively, it would be a good thing.' – **Man, 60s, Guildford**

'There could still be a degree of inheritance tax, but adjust the thresholds, so you do catch the very rich, but not the people who have worked all their lives, have a pot of money, an estate, which basically can be divided by the children without the taxman taking his share.' – **Man, 60s, Don Valley**

'Yeah, definitely [i.e. abolish inheritance tax]. Because you work all your life and we're of a generation where you save and you want to for your dependents. So you have to be very careful.' – **Woman, 60s, Don Valley**

In terms of specific policy priorities, then, this is very obviously one for the new Conservative leadership to prioritise.

In addition, we probed a range of policies to help young people specifically; these policies weren't all classic 'family' policies, but we have found people tend to think of them through the prism of their own children.

As mentioned above, there was little cut-through for many traditional family-friendly policies. But there was one other clear winner in the polling: apprenticeships. Voters love apprenticeships: they have stood out in practically every piece of opinion research we've ever conducted. Working-class voters tend to see them as stepladders to great (local) careers; middle-class voters recognise that the country needs huge numbers of people who can do vital real-world jobs from plumbing to housebuilding and everything in between.

As we have done for some time, we found this love for apprenticeships in abundance in our qualitative research. The focus groups were particularly effusive – with some who brought the policy idea up unprompted in conversation.

'What we need is more apprenticeships. You need people doing jobs and learning how to from scratch.' – **Woman, 50s, Swindon**

'We definitely need more apprenticeships. We definitely need to get more young people learning a trade.' – **Woman, 50s, Don Valley**

'I'm pretty supportive of small businesses and apprenticeships, skills and giving people other options to further themselves.' – **Man, 50s, Guildford**

In our immersive conversations we found a similar level of support for apprenticeships.

'I love apprenticeships. I think it's quite supporting and encouraging for young people, especially if you don't know where to go.' – **Male, 20s, Swindon**

'We need to bring back apprenticeships – not everybody's academic.'
– **Woman, 50s, Doncaster**

'In the society we are living in [with high rates of poor mental health amongst young people], we should bring back apprenticeships – not everybody's academic – bring back good parenting, bring back discipline.' – **Woman, 40s, Don Valley**

Interestingly, the focus groups strongly contrasted their love of the schemes with a scepticism of university education. There was universal agreement that apprenticeships were a much better option for young people.

'Those universities, half the time there's no jobs for them [graduates] and they're in debt by £26,000/£27,000 before they even start working!' –
Woman, 60s, Swindon

'If more money was invested in small businesses, they could probably do more and give more apprenticeships. My grandson is 18 and wants to go to uni, which none of us really wanted him to go to, because he wants to be an accountant. And if he had the chance to do his apprenticeship he could do it in a [small] business. But none of them can afford to take him on because they just haven't got the money, these small business owners.'
– **Woman, 60s, Guildford**

What does this mean for the Conservatives?

There are significant areas of public policy – and indeed particular policies – which would be both good for the country and are catnip to the Conservative electoral coalition. Robust but sensible policies on these core areas – border control, crime, welfare reform, family – should be a core priority for the party going forward. Indeed, an assertive and classically 'Tory' approach to social issues in their policy design and their campaigning can, we believe, help them make very serious electoral gains with those people who might again vote Conservative.

‘Robust but sensible policies on these core areas – border control, crime, welfare reform, family – should be a core priority for the party going forward’

But there are clear limits. While the public want a 'tougher' approach on border control, crime and welfare, they are not totally unsophisticated. They recognise some immigration is required and when it comes to it they are more moderate than their instant reaction might first imply; they want the police and courts to act fairly as well as firmly; and they believe welfare should be generous to those that really need it.

In other words, the Conservatives aren't – and shouldn't try to be – Reform; in their voters' eyes, they need a more thoughtful approach because they might actually form a future government.

Chapter 4 – Areas of divergence

The previous chapter dealt with policies where Conservative thinkers and the public are, broadly speaking, in full accord. The challenge is simply (or not so simply) to persuade the voters of the party's bona fides.

There are also some policy areas, discussed in the next chapter, where there are bigger challenges for the party in winning the voters over – in particular on the NHS, with its knock-on implications for views of the economy and public spending.

But there is a third category of policy – those where the voters and Conservative policy-makers may or may not be in agreement, but certainly vary hugely in the salience which they give to them.

‘Over the last few years, there has been an explosion of interest in the apparent growth of what used to be called ‘political correctness’ and which is now more commonly called ‘wokeness’.’

‘Political correctness’ and ‘wokeness’

Over the last few years, there has been an explosion of interest in the apparent growth of what used to be called ‘political correctness’ and which is now more commonly called ‘wokeness’. Many commentators have been convinced the public cares deeply about this theme. In our experience, this isn’t the case; or, rather, it’s mostly not the case.

Taking the issue of ‘trans rights’ or gender identity: this is an issue which has regularly dominated headlines over the last few years. However, in most of the qualitative research we’ve done in the last few years which has touched on this, most people know little about the issue and care little about it too. The same is true of much of the rest of the ‘culture war’ debate. While it electrifies debate in Westminster, it mostly sails over ordinary people’s heads.

‘I haven’t really read anything about it.’ – Man, 40s, Guildford

‘Could somebody please explain to me what ‘woke’ is? I try to keep up with things. But could you clarify?’ – Man, 60s, Guildford

'I think we're better off teaching our kids to be kind than unkind. And if that means that we're creating a more 'woke' society, and some people don't like it, I'm happy to go with that. I think we do need to teach children or teenagers more resilience; like my daughter, particularly, it's like, 'Oh, God I was so stressed, I'm so stressed' you know, nothing really has happened at all. And it's very easy for her to say that, and I think that rather than pandering to it we need to build resilience. And I think that I remember talking to one of her teachers at school who said that genuinely, she's 17, that generation of children just hasn't built the same resilience as other kids, because they were in their bedrooms at home, you know, and didn't have to deal with difficult situations at school and things like that. So it's created less resilience. And I don't know whether that is a bit 'woke'? – Woman, 40s, Guildford

'I think it [political correctness] has its place. But I just don't see why we have to bow down to a very, very, very small minority of people. I'm extremely respectful. I work for [a big international company]. And I'm extremely respectful of anyone who's woke. I really am. But sometimes it's just I think, a little bit too far. I can't say 'ladies and gentlemen'. I have to say 'hello everybody', which I think is a little bit daft.' – Woman, 40s, Don Valley

'It's like all going backwards. I mean, I can remember when my daughter was born, Obama just got into power. And I thought, great, well, a black president, that will change the culture. Yeah. And then now, we've gone completely backwards and then for us just to talk about those things it's like going back 20 years and not being able to talk about Pride or LGBT.' – Woman, 40s, Don Valley

'I don't think there's any vote-winners [in being anti-woke]. Well, it might be from a certain group and population being sort of the more 'right wing'. But for the majority of the population, you'd probably alienate a fair few because these things that were, like, taboo in the 60s and 70s and 80s are not taboo anymore.' – Man, 60s, Don Valley

In short, because most people know little about these issues, and many people care less, public attitudes seem to be all over the place, with no real pattern.

The issues in this space that tend to secure interest with the public are those that touch on national identity and patriotism, and also those that take you into debates around protecting what you might call the ‘innocence of childhood’ (which is what adherents of this tend to think of it as). On the former, we’re talking about things like telling people that Britain has a shameful history, which massively winds up a large chunk of the country. On the latter, we’re talking about things like the very early teaching of sex education, or very early teaching about adult relationships.

*‘I think there is a respect line. There are men and there are women.
And there is a certain age limit where it needs to be talked about more.’*
– **Woman, 40s, Don Valley**

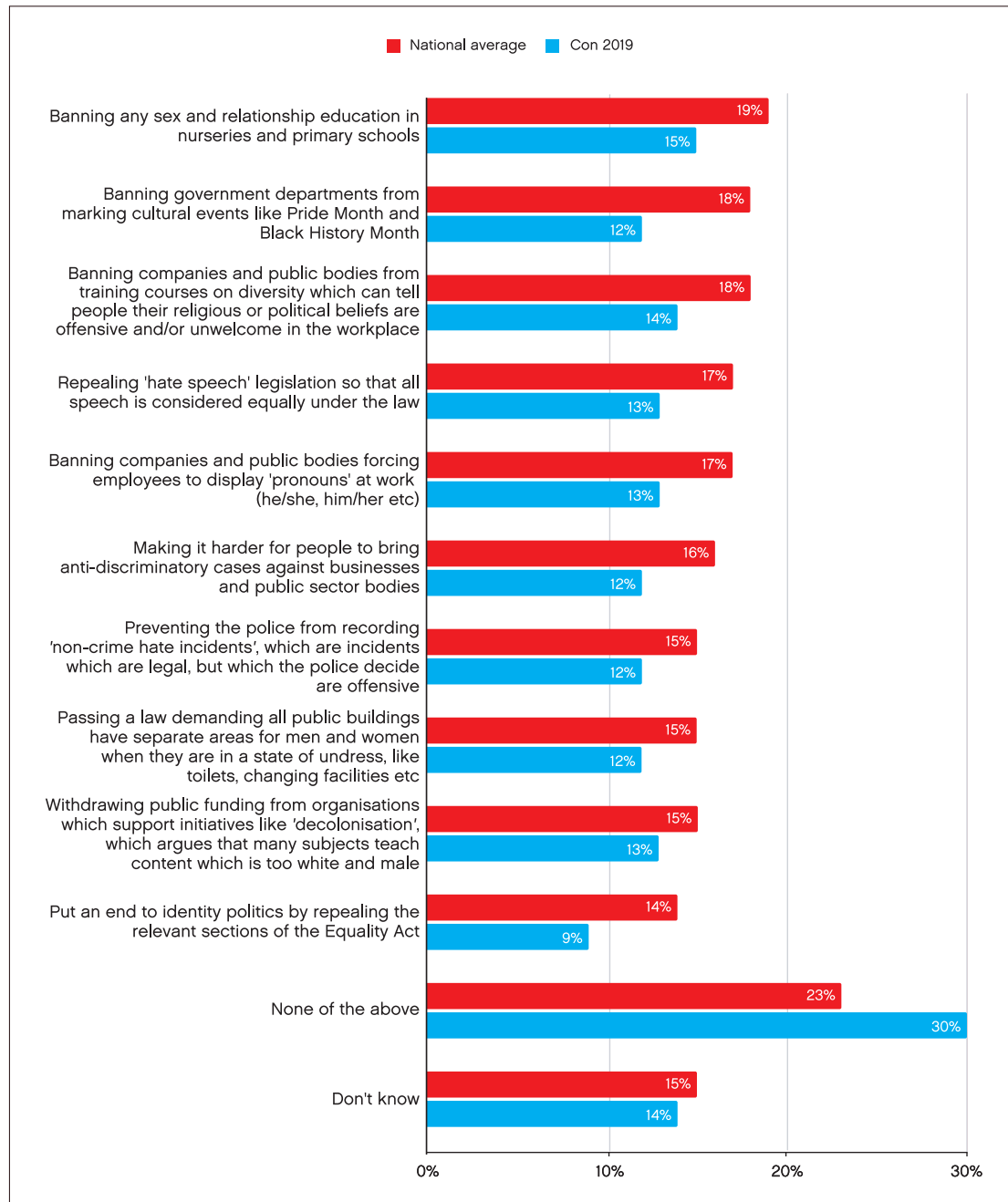
Accordingly, in our polling for this project, when we asked what the Conservative Party would need to do to persuade people to vote for them in the future, top of the list was ‘stop being so incompetent in Government’, followed by ‘do more to reduce immigration’. ‘Become more anti-woke’ was significantly down the list.

That said, we have found ‘anti-wokeness’ has slowly been creeping up the list of public concerns; it’s certainly an issue that lights up a significant minority of the population. While the Tories becoming ‘anti-woke’ wasn’t a priority for most voters, it was supported in large numbers by older voters, Leave voters, and 2019 Tory voters. In fact, for 2019 Tory voters, becoming ‘anti-woke’ was the third most chosen option that would make them vote for the party again in the future – behind only stopping being incompetent and cutting immigration.

**‘Telling people Britain has a shameful history
winds up a large chunk of the country – but making
‘anti-woke’ a publicly defining issue risks looking
out of touch when the public are still reeling from the
cost of living crisis and can’t get a GP appointment’**

Equally significantly, when asked which policy options people would oppose a Government taking to deal with the effects of political correctness/woke attitudes, only minorities of people opposed any of the options. For example, 19% said they’d oppose the banning of any sex and relationship education in nurseries and primary schools (only 15% of Leavers and 15% of Tory 2019 voters opposed the prospect of such a ban).

Which of the following policies would you OPPOSE a new Government considering to deal with the effects of 'political correctness' or 'woke' attitudes? Select any that apply



In summary, the Conservatives should be wary of making 'anti-woke' a publicly defining issue: it risks making them look like they've got the wrong priorities at a time when people are still reeling from the cost of living crisis and when getting an appointment with a GP is still painful for so many.

That said, if and when such issues emerge into the public debate, the Tories should engage with confidence – assuming that those issues touch on those elements of patriotism, or protecting children, that we identified earlier. It was notable that in the recent US election campaign, the Republican attack on Kamala Harris was not that she cared too much about woke issues, such as care for transgender prison inmates, but that she cared about these issues at the expense of voters' actual day-to-day priorities.

The environment

As with ‘political correctness’, many right-leaning commentators believe that vast numbers of voters hate the ‘green agenda’ and blame it for rising energy costs. Many think ‘green scepticism’ – or, perhaps more accurately, Net Zero scepticism – should form the basis of a popular public agenda.

We have conducted vast amounts of opinion research on this issue. And it simply isn’t the case. During our qualitative research, only one person expressed outright opposition and hostility to Net Zero – although he did it with complete clarity.

‘Net Zero is bollocks, isn’t it?’ – Man, 60s, Don Valley

In our experience, most voters, including most working-class voters who watch their spending carefully, are very supportive of Britain committing to tackle climate change. This began to shift in earnest in focus groups around five years ago. At that point, more and more voters started to say, without prompting, that they were concerned about the environment and the Government was right to move to protect it. Younger voters have always been the most enthusiastic, but older voters started saying things like they wanted to protect the environment for the sake of their children and grandchildren.

In more recent times, even right-leaning Conservative voters have shifted towards, for example, renewables, because they want a secure energy supply not reliant on imports from potentially hostile regimes. In short, many voters think renewables are both more secure and cheaper – as well as being better for the planet.

This all played out in our qualitative research for this project.

‘I’m very concerned about the environment, especially around here as we’re in quite a nature friendly area... We’re both dog owners, and we love to be able to get out into nature and walk the dogs.’ – Woman, 40s, Don Valley

‘I want to keep Net Zero because we are definitely working towards a disaster.’ – Woman, 40s, Don Valley

‘I mean, I do like stuff like the big wind turbines and stuff like that. Yeah, that’s a really good idea, you know, to be able to, like, use green energy, and then try and reduce it [cost of energy] that way.’ – Man, 50s, Swindon

'We're losing too much green space. I've seen the effects of it. Since even this Christmas, I drive my husband to work every morning early in the morning as he is a postman. And you know, up until Christmas, I was seeing so much wildlife. And I can count on one hand how many animals I've seen on the way home since Christmas.' – **Woman, 40s, Swindon**

While it's true to say many voters are opposed to paying more taxes and charges in the name of green policies, this doesn't imply hypocrisy or a lack of concern. For many voters, they simply can't pay more for their energy bills, just as they can't pay more for their food and grocery bills. They don't have any money to spare.

It's also true of course to say that most voters don't understand 'Net Zero' – what it means or its implications for policy (although most MPs and policymakers don't seem to either). More and more people have heard of the term and, in focus groups, typically half say they've heard of the term and can very vaguely define it.

'While younger voters typically care about climate change, older voters are more likely to care about things like pollution and over-development'

But to the extent that they understand it, they usually support it strongly. If anything, they want a more aggressive target.

'I hear what people are saying about Net Zero [i.e. negative things]. But I'm thinking well, at the moment, I think up to a third of our energy comes from green energy. It is going to create jobs and opportunities. And anything that gives us independence from Russia I'm all for it.' – **Man, 50s, Guildford**

We expect that, in time, the numbers of people who support Net Zero policy specifically to fall away. This is because, as with any policy, as people learn more about it, more scepticism always emerges.

'On Net Zero, I think there's a lot of focus on that and these electric vehicles and things like that. But the actual country doesn't have the facilities to accommodate all of them. So we're going around having to build substations in service stations and all sorts and then you've got the disposable side of the batteries. And it's just, it's a great idea on paper. But then, when you actually look at the practical side of it, it's just not. It's not realistic.' – **Man, 40s, Guildford**

'We're pumping billions into that Net Zero – but is it actually working?'
– **Man, 50s, Swindon**

But regardless of what they come to think about Net Zero, such is the support people have for acting in some way to protect the environment, that we expect support for 'green policies' to remain high. Indeed, in this research, when we asked voters what they might want a new party to stand for, the third top answer was 'environmentally friendly'. Admittedly, this characteristic was much less popular amongst Leave voters and Tory 2019 voters, but was still backed by significant minorities of them. Likewise, when asked what policies any party might offer in the future, 'developing green jobs' was a very popular option (again backed by significant minorities of Leave voters and 2019 Tory voters).

Of course, different groups of voters are interested in different environmental issues. While younger voters typically care about climate change, older voters are more likely to care about things like pollution and over-development. And clearly, it's reasonable to call out the excesses of hard-left green activists, to question how the country should approach Net Zero policies (which often seem hopelessly vague), and to prioritise doing everything we can to keep voters' energy bills down. But there is nothing to be gained for the Tories electorally by listening to hardline green sceptics and pivoting against green policies as a whole. It simply isn't where the public is.

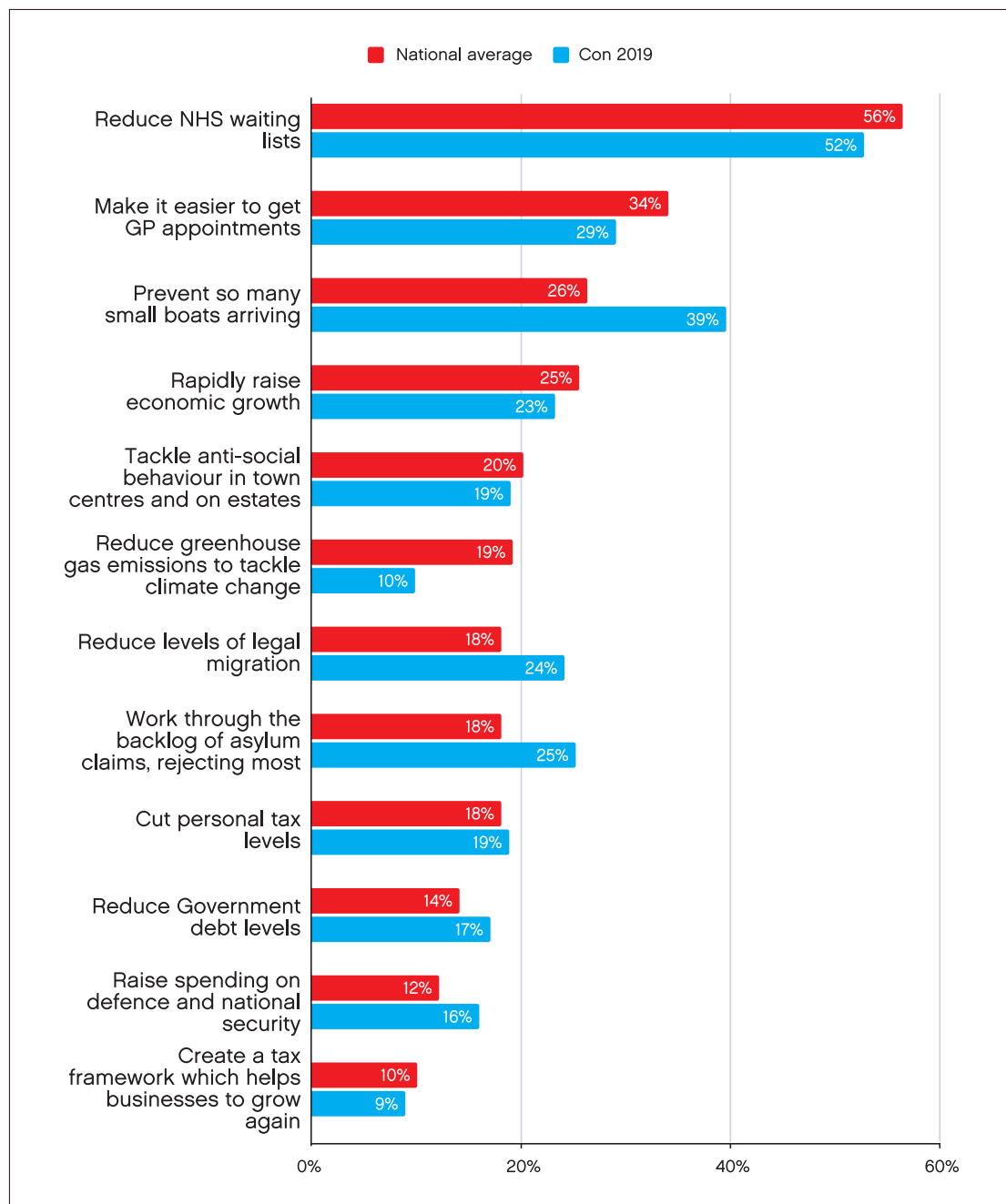
Defence

In the wake of Russia's invasion of Ukraine, defence has moved sharply up the agenda in Westminster. Commitments to increase defence spending have become a live topic of conversation. But the sad truth is that, while absolutely necessary for the country's future and security, defence simply isn't a priority for most voters.

‘In both our quantitative and qualitative work, spending more on defence was seen as a desirable rather than necessary policy goal, firmly subordinate to day-to-day concerns’

Asked which challenges facing Britain in the short term the next Government should prioritise, raising spending on defence was well down the list, backed only by a small minority of voters as one of their three main priorities. Top were reducing NHS waiting lists, making it easier to get a GP appointment, and preventing so many small boat arrivals. It wasn't a meaningful priority for Leave voters or Tory 2019 voters either.

Which of the following challenges facing Britain in the short term do you think the next Government should prioritise? Select up to three



It is true that a significant minority of voters suggested they would want a new party to stand for 'strong national defence'. Indeed, among 2019 Conservative voters it was the second most popular answer, behind 'competent leadership and management'. Likewise, there was strong support for increasing spending on defence back to the levels of the Cold War – both among voters as a whole and among Conservative 2019 voters. But in both our quantitative and qualitative work, this was seen as, effectively, a desirable rather than a necessary policy goal, firmly subordinated to day-to-day concerns.

In terms of foreign policy more broadly, there were again some encouraging answers, which accord with recent Tory priorities. When we asked for policy preferences on foreign and security policy, the top answer was 'forging closer links with the 'Anglosphere' countries – Australia, Canada and New Zealand'. Inevitably, given the passion many Remain voters continue to have towards EU membership, holding another referendum on Europe was the second highest priority among voters as a whole (though not with Tory or Leave voters). The third most popular option was 'pursuing a free trade agreement with the US'.

For Leave voters and Tory 2019 voters, developing the 'Anglosphere' and pursuing an American trade deal were by far the most important. But again, no overseas issues were high up voters' priority lists.

‘Conservative voters wanted a new party to stand first for ‘competent leadership and management’, then for ‘strong national defence’

What does this mean for the Conservatives?

On 'political correctness' and 'woke', and indeed on defence, the public are *broadly* in line with the approach you might expect a new Conservative Opposition to take, but they don't view either as a priority.

Of course, there are differences. Voters say they care about defence, but they ultimately don't view it as a spending priority. By contrast, a small number of voters really care about 'woke', but many don't and an apparent obsession with it could leave the party looking odd. And on the environment, there is a broad consensus among the electorate, including among Conservative voters, that climate change is happening, the environment is being damaged, and it is a good thing for our country to take action to stop it.

It is hard not to conclude that defence is such an existential threat to the country that the party should seek to persuade voters to back higher spending, even at the risk of having to make cuts elsewhere. Making this argument is unlikely to annoy voters, although the corresponding cuts will need to be handled carefully. On 'woke', the party will have to choose its battles and not leap into what many commentators seem to want: a permanent, intense battle on all forms of political correctness. That way lies looking completely out of touch – as with any kind of crusade against Net Zero in all its forms, or indeed against the concept itself, rather than a bread-and-butter focus on decarbonising at the lowest cost to voters' pockets.

Chapter 5 – Areas of difference

If the Conservatives ought to be confident about intelligently building social issues into their policy and campaigning, with relatively few concerns about the impact of taking a traditionally and typically Conservative position, the opposite is true when it comes to public services and economics.

There are some positives. Our research confirms there remains a strong legacy of support for Conservative economic principles. For example:

- Conservative 2019 voters are more likely to say a) 'The country is living beyond its means. Government debt is high, vast numbers of people have high personal debt levels and welfare is too high', rather than b) 'The country is living modestly. Government spending is low and many people are struggling to make ends meet, whether in work or on welfare' (A: 63%, B: 37%)
- They still care about growth more than left-leaning arguments on inequality. For example they will say a) 'Economic growth matters more than redistribution, because it makes everyone richer', rather than b) 'Redistribution matters more than economic growth, because we need to reduce inequality'.

‘We are absolutely not at the point where Conservatives can espouse small-state, free market principles and expect a surge in popularity’

Likewise, as we shall discuss below, there is strong support – at least in theory – for balancing the books so that the state cannot spend more than it earns.

Yet we are absolutely not at the point where Conservatives can espouse small-state, free market principles and expect a surge in popularity; indeed, that is an understatement. On issues such as the role of the state, or the extent of welfare benefits for the relatively well-off retired, voters are very far from looking nervously at levels of state spending, and projections for future deficits. They are also deeply sceptical of business, especially big business.

While they told us repeatedly that they were tired of being lied to by politicians, and would reward those who were honest with them, they were unwilling to consider almost any uncomfortable fiscal trade-offs which we presented, ranging from the need to reform the NHS, to curtailing spending on the retired, to building on greenfield land. They are also supremely neuralgic about the state of the NHS, in a way which impacts on their views on every other issue in this space.

This doesn't mean the Conservatives should simply junk positions they think will boost the country's fortunes; however, it does mean the party will need to adapt to reflect the straightforward realities of public opinion, as well as potentially starting to make some arguments on principle which have simply not been heard for many years.

Everything starts with the NHS

It is hard to overstate the importance of the NHS to people's lives. People don't just turn to it when they have a serious illness – or indeed a mild illness that simply needs some basic medicine – they turn to it when they need treatment for injuries and discomforts keeping them out of the workplace. People feel they have no alternative to the NHS and without it their lives would crumble.

It is clear from our research that people think the performance of the NHS:

- is a barrier to economic growth
- matters more than debt
- matters more than tax cuts; and
- certainly matters more than defence

This is not to say, of course, that people think the NHS is perfect. They absolutely don't. But they overwhelmingly believe that its problems come down to inadequate funding: by far the most popular health policy we tested, among voters in general and among Conservatives too, was 'keeping the NHS the same, but putting a lot more money into it'. By contrast, radical proposals for replacing the NHS with a social insurance model, or even more minor changes such as introducing co-payments or small charges for services, received the frostiest of receptions.

‘People feel they have no alternative to the NHS and without it their lives would crumble’

Until or unless people think the NHS is properly funded – which they currently don't – it will be hard to have a conversation with them about the trade-off with other economic priorities. That is particularly true of older voters and less professional voters (professionals are a bit more open to reform messages) – but in truth it matters to everyone.

In Guildford, a painter and decorator – who explained he had never had a day off work in his life – told us in the local Wetherspoons that he has found himself off work since November 2023 and now relies on benefits due to treatment delays for a prolapsed disc in his back.

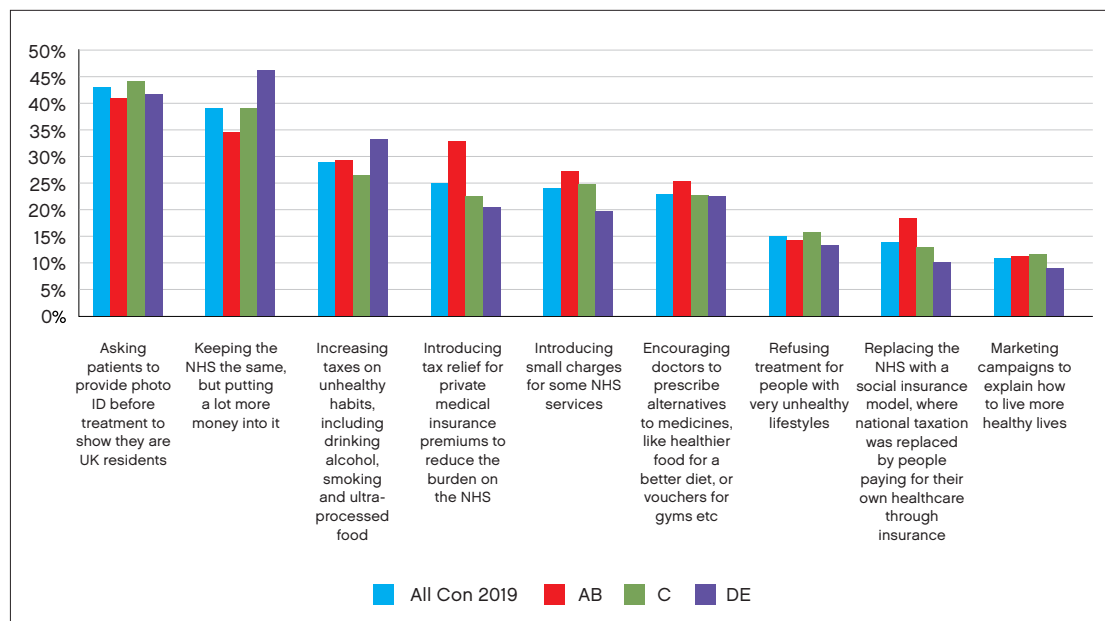
'It takes three months after an MRI to get an appointment just for them to tell you what is wrong with you. And then you have to wait for another bump for an operation. Which is terrible because I've had to sign on since January because I thought I was gonna get better from November to January. I thought it was only a bad back and it would clear up. I got the MRI in December. It took until March 27 to get an appointment with the doctor. He said, 'You've got a prolapsed disc blardy blah', we'll give you an injection. And now I've got a letter last week [June 2024] saying my next appointment is the 13th August [2024]. So once we get the operation, I will nearly have been off work a whole year, just for a bad back.' – **Man, 50s, Guildford**

Unsurprisingly, in Swindon, a group of women that run a local group of volunteers said healthcare was their number one concern.

'I think the NHS is the biggest [long-term challenge] because it affects so many things.' – **Woman, 60s, Swindon**

If the NHS appears not to function at all, despite large-scale increases in funding, it isn't surprising people see it as a priority. Admittedly, Conservative 2019 voters strongly think immigration is putting pressure on the health service, and professional Conservative 2019 voters (AB) are somewhat keener on introducing NHS policy reforms. But overall, they line up with the rest of the electorate.

Which of the following policies on the NHS and healthcare would you most want any party to offer in future elections? Select up to three



This may seem not just odd, but deeply depressing. Most voters seem to be simultaneously disappointed with the NHS, yet panic-stricken about the prospect of change: of treatment becoming harder to come by or, worse still, too expensive. It's as if people prefer the continued 'sticking plaster' approach – with more money poured in apparently randomly – to a proper attempt at reform, which might improve things but would also risk making them even worse.

'The NHS is just not joined up. It is not good enough just to say 'I'm going to spend so much more money, and you'll have so many more nurses' and what have you. Whereas most of the things I run into are the different systems within it don't talk to each other. And you just keep on having to chase one and then chase the other and that kind of thing.' – **Woman, 60s, Swindon**

In Don Valley, a former miner told us he was worried about the effects of the poorly run NHS on the wider economy.

'There's an old saying that the nation's health is the nation's wealth. We've got to do something about the NHS.' – **Man, 70s, Don Valley**

Traditionally, a very large proportion of the population tends to favour tax cuts at any one moment. This cohort is currently much smaller than usual, because of the extreme fear people have over any measures that might undermine the NHS in any way. As one man in Guildford put it, he supported the need for balanced budgets – so long as the NHS was not adversely impacted.

'I agree with that [the need to balance the budget]. But it depends what they're gonna cut back on. Are they going to be cutting back on the NHS or essential services? I'd say that the essential services they should be spending on them.' – **Man, 40s, Guildford**

Since the election, the Labour Government has been forthright that the NHS needs 'reform'; they have said explicitly 'the NHS is broken' (although they've softened this with 'but not beaten'). What should the Conservative reaction be to all this?

There is no denying that Labour have more 'permission' than Conservatives to say these sorts of things. This is partly because most voters believe Labour want to protect the NHS, while there is residual suspicion that the Conservatives would like to privatise at least some of it. It is also partly because unions and much of the wider NHS workforce have become so hostile to the Conservatives that even hinting at 'reform' provokes an extreme response.

Therefore, while the Conservatives can and should encourage NHS reform, it makes political sense in the short term to give qualified support for Labour's programme – while suggesting narrow, specific, constructive reforms that might run alongside.

This is by far the most difficult area for the Conservatives – where their natural inclination to reform things runs up against public hostility. It is all the more frustrating because the size and role of the state, and the national tax take, can't meaningfully be reduced while the NHS is run along its current lines: indeed, the OBR has forecast that demographic changes will see the share of GDP that it takes up doubling over the next 50 years.

The Conservatives ought to support reform, but need to be mindful of the parameters public opinion has set. Going beyond these parameters would lock the party out of power for a generation.

The role of the state

The public's view of the role of the state is more complex than their view of the NHS. But there is no doubt that over the last 14 years, opinion has moved against the historic Conservative position that the state should be limited in size and scope.

One area where this is very clear is in preventative health, where those we surveyed clearly thought it was plausible for the state to act to prevent, for example, obesity.

In the list of options on healthcare, joint-second – albeit significantly below the top answer of keeping everything the same but with more money – was ‘encouraging doctors to prescribe alternatives to medicines, like healthier food for a better diet, or vouchers for gyms etc’, chosen by 28%. This was not quite as popular with Conservative voters (who prioritised asking people to show photo ID to prove that they were UK residents) but even Tory supporters quite liked the idea.

This mirrors our qualitative research, where there tends to be significant interest in this.

‘I think maybe it comes down to education. Maybe we should have something kind of like a speed awareness course. So if they have been diagnosed with a lifestyle condition they should be made to engage in some sort of education about how to manage it better rather than just being given pills.’ – Man, 50s, Guildford

‘We look at obesity wrong. Obesity is a mental health issue. If you changed that word of obesity to anorexia we wouldn’t be having this conversation right now. It is an issue with food, which is a mental health issue which needs to be tackled. So yes, I do like free gym membership or free support groups around food education that would definitely help people much better – as you would do with someone who is anorexic.’ – Woman, 40s, Swindon

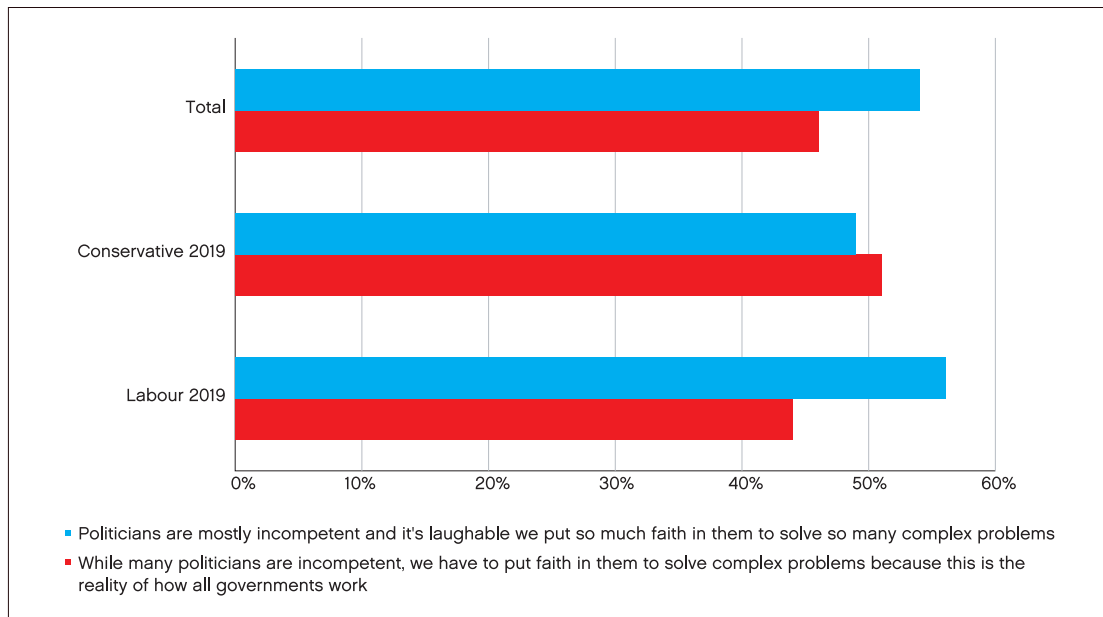
What we found on public health, we are finding in all the other research we do. There is more expectation – and consequently more willingness – for the state to act to solve even the most ‘personal’ of problems. Why this has come about is hard to answer. Many people blame it purely on Covid, but in truth the trend long predates the pandemic. Our sense is that there are three main explanations.

First, precedent. As the Government has intervened in more areas – bailing out banks and Covid furlough payments being obvious examples – so it seems ordinary for Government to do similar things. Second, inflated promises. During their time in office, the Conservatives began to promise more and more action to deal with more and more problems. Third, social media. With so many hard luck and personal interest stories floating around, there are more and more demands for ‘something to be done’, which can be hard for individual politicians or Governments to resist.

There is, however, a way through this. While the public – even Tories – want the Government to be doing more, polling numbers change significantly when people are exposed to the argument that this means the politicians they hold in such contempt taking more power over their lives.

For example, we asked the public which of the following statements they agreed with more: ‘Politicians are mostly incompetent and it’s laughable we put so much faith in them to solve so many complex problems’ and ‘While many politicians are incompetent, we have to put faith in them to solve complex problems because this is the reality of how all governments work’. There was overall a slight majority for the first statement. Interestingly, Labour voters seemed more sceptical of Government action – but we suspect this is related to the nature of the ruling party at the time, and that their position will now have switched, even as Conservative voters become more sceptical of the state under Keir Starmer.

Which do you agree with more?



In short, Conservatives who do think that there should be limits to the role of the state in the economy and society – and, indeed, that we are some way past them – should look to Ronald Reagan, the most obvious example of a politician who made the case that he, as a politician, was not the man to solve everyone's problems. In this climate, you can make the case for a small state – but it can only be convincingly done through a negative prism.

Taxes and balanced budgets

In our polling, there was significant support among Conservative voters for the idea that the Tory party should 'stand for clear Conservative values like a small state, low taxes etc', although it came significantly below doing more to reduce immigration. (Apologising for Brexit, by the way, did not make the top answers.)

But on tax, Tory voters do not look terribly different from others. They are more supporting of cutting the basic rate of income tax, and less supportive of introducing new taxes on wealth and the rich (though far more supportive than many Tory MPs would be comfortable with). They favour crackdowns on tax evasion. And, as mentioned above, abolishing inheritance tax is a particular bugbear. They are also just as opposed as the rest of the public to cutting the top rate of tax.

In short, they definitely want to pay less to the state, like everyone else. But there is still a significant divergence between those tax measures they would prioritise, and those that a think tank like the Centre for Policy Studies would judge to be economically optimal. They are, however, open to a traditional message – as deployed by Margaret Thatcher, or indeed David Cameron – of the virtues of national thrift.

Indeed, for most of the last 25 years, not just Conservative supporters but the wider public have held a strong instinctive belief that balanced budgets are right and the Government should live within its means.

In the last Parliament, this belief was shaken. Not only did the Government pour vast sums into furlough payments, but it went on to fund the military defence of Ukraine and massively subsidise people's energy bills. At this point, in our regular focus group research, we found a significant softening in opinion on balanced budgets; people began to question whether they were that important after all.

This has since shifted back, as our new poll shows. The fundamental belief that Governments must live within their means – that we should all live within our means – remains intact. By 62% to 38%, voters agreed that ‘As far as possible, the Government should stick to balanced budgets each year, even if that means we need to make occasional sharp cuts in spending in difficult times’, rather than ‘The Government should not worry about balancing budgets each year, because sharp spending cuts badly hurt people, and we should just try to balance budgets when we can’. Among Conservative voters, this support was even stronger.

The owner of a small business in Don Valley told us he liked the idea because it would force politicians to be more honest about their spending commitments.

‘It sounds good because then you can’t make [unfunded] promises, can you? You [the Government] can’t say, ‘We’re going to spend all this money’. Generally, you know, in years gone by, you’d say the country does better under a Conservative Government and the people do better under a Labour Government. But you know, there’s got to be a payback. So while we’re having it off under a Labour Government, [people will know] there’s got to be a payback.’ – Man, 50s, Don Valley

Another man made an analogy with how he manages his personal finances.

‘I would say that’s a good idea. I mean, I don’t buy anything if I can’t afford it.’ – Man, 70s, Don Valley

In Guildford, some felt a balanced budget law would lead to a more predictable taxation regime.

‘I’m definitely for that. I think, again, that put taxes lower and more predictable as well. So yeah, I think that’s fair.’ – Man, 40s, Guildford

Clearly, the level of support would depend on how this was done. Given a list of policies to reduce Government debt that they might oppose, the least objectionable was ‘passing a law saying the Government cannot spend more than it raised in a given year’, chosen by 16%; 18% said they’d oppose ‘only allowing public sector wages to rise in line with levels of national economic growth’. Some of these sentiments were also echoed in our immersive and focus group research.

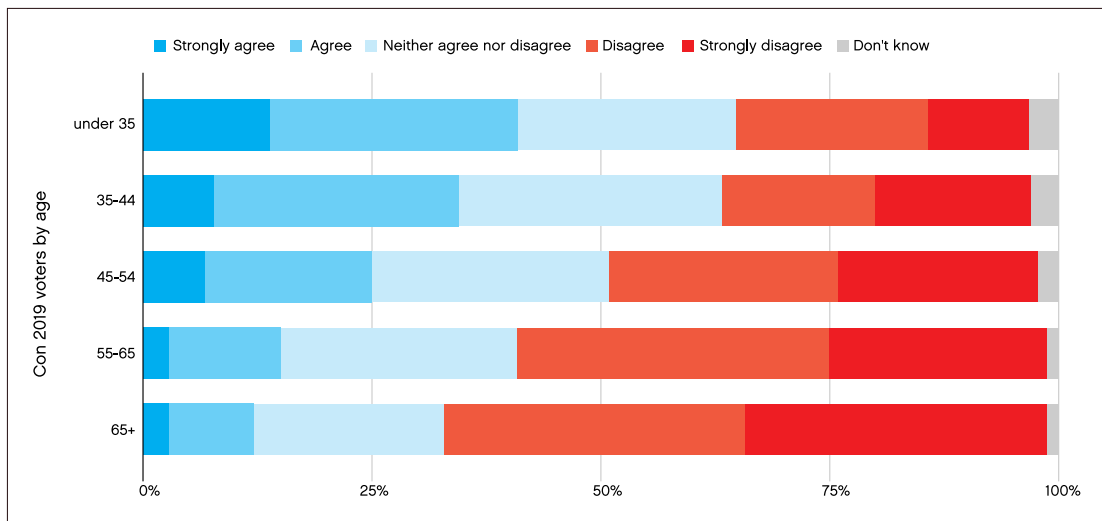
‘I think it’d be difficult [to introduce a balanced budgets law]. I think the problem is, it would be difficult to implement. Because you can’t completely gauge what you’re going to raise. And it could be that you have your money for one year. You wouldn’t be able to schedule stuff. You wouldn’t be able to plan how much you’re going to do. You’re suddenly going to go, ‘we’ve run out of money – so therefore, we can’t carry on with this bit of a project’. So I don’t think it would work. There might be that you could have a leeway to say plus or minus 10% or whatever.’ – Woman, 50s, Don Valley

'I think sometimes you do need to invest and spend more to be able to accumulate. Speculate to accumulate, isn't it? But sometimes you need to kind of overstep in order to kind of make those big, big jumps.' – **Man, 40s, Guildford**

The billion-dollar question, however, is the extent to which balancing the budget is a priority for voters, as it was in both 2010 and 2015. And indeed, the extent to which voters recognise the trade-offs that might be required.

Sadly, it is crystal clear that Tory 2019 voters do not understand the reality of the public finances. This is most notable intergenerationally. A major priority for older Conservative voters, both current and potential, is 'looking after pensioners'. Among those over 65 who voted Tory in 2019, 42% selected this as a top three priority for any new party. They do not think we need to rebalance away from pensioners (nor, by the way, do the young), and they do think social care (and the NHS) need much more money.

Do you agree or disagree with the following statement: We have an ageing population and can't keep being so generous to pensioners



In short: there are traditional small-state, free-market messages that will appeal to voters, particularly over the need to live within our national means. But the public are fundamentally unwilling to confront the trade-offs that entails, particular over spending on the NHS and the retired. And if it comes to the crunch, we strongly believe that they will prioritise the spending, rather than the restraint. This is one of the core challenges for the Conservative Party as it tries to renew itself – and indeed for every party.

Attitudes to business

The Conservatives have historically been the party of business. Today, unfortunately, big business is almost as unpopular as the Conservatives themselves.

It is true that there was a surge in sympathy for large employers after we finally left the EU; at that point, even amongst Leave voters, there was a collective intake of breath at the thought that many employers might leave Britain. There was a sense and an acceptance that we had to create an economic climate that even the biggest businesses would appreciate.

This has changed dramatically. Many people felt big businesses had a 'good' pandemic, but that meant that they did well when everyone else suffered. Even more people felt that big businesses essentially ripped them off during the cost of living crisis – using inflation to sneak through price rises they'd always secretly wanted. In focus groups at the time, this came across strongly: supermarkets and petrol stations were particularly in the firing line. This anti-profiteering sentiment still remains a problem for specific sectors (not least the privatised utilities).

We should not overstate the case. While our qualitative research found largely negative views towards big businesses, even among Conservative voters, there was still some support for corporation tax cuts, suggesting some realism towards the impact of big businesses on the wider economy. When in our polling we gave voters the choice between the statements 'We should want businesses to make large profits so that they can employ more people and so that they stay in Britain' and 'We should not want businesses to make large profits because they often rip off customers and because their leadership teams typically just use profit to pay themselves more', the country as a whole opted narrowly for the first statement – but more emphatically in the case of 2019 Conservative voters, who supported it by 68% to 32% (almost identical to levels of support for the statement 'the private healthcare sector is good/bad').

In the Swindon focus group, one man argued that tax cuts for big businesses were good for reinvestment. Another participant immediately jumped in to support suggesting that *'big businesses give lots of people jobs'*.

'No matter what you do, they will find loopholes regardless of what you do they will survive. I think that maybe making a little bit easier [with tax cuts] will help. As I said you can reinvest, not all the companies are evil.'

– **Man, 50s, Swindon**

'I don't think those [creating a low-tax environment for big businesses] are the answers. But I think we do need to think about how we encourage big businesses to set up here.'

– **Woman, 40s, Guildford**

'So if they do pay proper taxation here, they won't stay and so they won't employ people here. They won't put their money back into the economy here. I don't agree with the rich getting richer. I don't agree with that at all. But we do need to have big companies here and not just tax them because they just won't stay.'

– **Woman, 30s, Guildford**

During that focus group in Guildford, some participants – while sympathetic towards cutting taxes – also recognised that businesses need more than just tax cuts to support their growth and ability to compete.

'I think the problem with tax is that it's only one facet of what we need to have to facilitate businesses to come here. Now that could be the regulatory environment and that could be building on green land. It could be a whole host of things. It could be tax breaks, as have been offered to the car companies, for example, to come and set up factories. But I just say, what companies need is to be able to make a profit, to be able to make a profit, they need some degree of stability. And at the moment, the country is very unstable. And I think there's a lot more to it than just tax.'

– **Man, 40s, Guildford**

Where the public are unequivocally positive, however, is in their attitudes to *small* businesses. Practically everyone believes small businesses are vital to the economy and need as much help as the state can provide. In particular, during our qualitative research, we found high levels of concern over the future of small businesses and what that meant for the state of their local communities.

'Small businesses drive the economy.' – **Man, 50s, Guildford**

'I like that [i.e. cutting taxes for SMEs and sole traders]. I work in banking and we see a lot of people in businesses – small businesses, sole traders – fold. And that is because they just can't afford everything that's been thrown at him. If they were given a bit of a tax break, they probably would still be trading.' – **Woman, 40s, Don Valley**

'I think we need to grow our businesses. We've seen so many businesses, and especially small independent shops, that have gone off the high street. We need to grow and develop businesses.' – **Woman, 60s, Swindon**

'I think we should encourage any business – small and big – to make a standing in the UK. I've got no problem with that and they should be encouraged. The reverse of that is they should pay proper taxation. The easy hit is to look at the energy companies at the moment. And maybe they should pay more as they have done rather well since the war in Ukraine.'

– **Man, 60s, Guildford**

This echoed the findings of our polling. As mentioned above, the most popular economic policy we tested was increasing the number of apprenticeships. Investing in transport infrastructure also did well, both among the public and Conservative 2019 voters.

But fourth on the list was reducing taxes on small business owners and small traders – whereas ‘introducing no new regulations on business without taking old ones away’ was the least popular of all the policies, both among Tory voters and the general public. (Similarly, ‘lower the burden of regulation on businesses’ was the lowest priority for voters when we presented them with a list of long-term challenges facing the country.)

Likewise, when we asked people which policies to help small business they would oppose, it was notable that they did not object in large numbers to any of our suggestions. This suggests that the Conservatives’ pro-business messaging, and policy focus, should overwhelmingly be on policies that can be presented as helping small, local firms.

‘The Conservatives’ business messaging and policy focus should overwhelmingly be on policies that can be presented as helping small, local firms’

Education

The Conservatives’ record on education in Government is one of their genuine accomplishments in office, at least in their early years from 2010 – under Michael Gove, and with the support of long-term Schools Minister Nick Gibb. In this period, they introduced free schools and dramatically increased the number of academies. This reform programme created some incredible schools across England, which would never have existed and which have completely transformed the opportunities of school pupils across the country.

In truth, the public never supported these reforms. They weren’t met with great opposition either, but the wider public were largely unbothered about the programme. Instead, the reforms were primarily supported by relatively small numbers of parents in lower-middle-class and working-class areas where education provision was generally poor, and tended to be opposed by small numbers of self-consciously left-leaning parents and activists.

Phonics – which the Conservatives introduced into schools at around the same time – was viewed differently. Parents tend to be much more supportive of the shift, although it’s hard to claim that this is an actual vote-winner.

Either way, most voters haven’t been terribly interested in education as an issue for most of the last two decades. The exception, as discussed above, is improving technical education and apprenticeships. In focus groups we’ve run we’ve found voters almost uniformly supportive of better technical education and a massive expansion of apprenticeships.

In our poll, when we gave people a list of options for prospective education policies they’d support, the top answer (as ever) was more free childcare. Next were more funding to build more schools and giving more powers to schools to suspend/exclude unruly pupils. After that came ‘increasing funding for technical education outside of universities, to increase the number of apprenticeships available’. This option came second for Leave voters and Tory 2019 voters. In our view, this is effectively the most popular substantive education policy, although the Tories should certainly have strong messaging on suspension and exclusion.

This is obviously disappointing. Education and school standards are completely critical to the country's future, and to the future of our children. But they tend not to be issues that the majority of voters pay that much attention to – and haven't for at least a decade and probably closer to two. Were there to be a noticeable decline in standards or behaviour, the public would become engaged; if things stay as they are, the public will barely notice any reform.

The Conservatives should therefore focus on reforms that will drive up standards – but not worry about trying to win votes off the back of a cleverly marketed reform programme. The Conservatives should also, however, create and drive a programme to increase and improve technical education. While they did some good work on this in Government, they hardly ever spoke about it publicly, or at least not nearly enough.

‘Education and school standards are completely critical to the country's future, and to the future of our children. But they tend not to be issues that the majority of voters pay that much attention to’

What this means for the Conservatives

If the Conservatives can confidently proceed with their agenda on social policy (within reason), their approach to public services and the economy needs more careful thought and handling. The public – even 2019 Tories – simply aren't aligned with traditional Conservative philosophy in the same way.

This is most obvious on the NHS, where the traditional Tory position ('we love the NHS, but it does need reform') needs extremely delicate handling. Our research strongly suggests the Conservatives should broadly back any attempts at reform from Labour, while offering narrow, specific additional ideas to improve efficiency and productivity.

Elsewhere, on the size of the state, the economy and business, there are pathways along which the Conservatives can press their historic positions without risking too serious a backlash.

On the size of the state, the Conservatives should have the self-confidence to argue the state can't do everything – or indeed most things – because the state is ultimately run by imperfect politicians. On business, it's more about lining up behind small businesses, not big businesses, while also making a realist case that big businesses – who pay the most in tax – need to be looked after or they'll up and leave for other countries.

Conclusion

The rapid fall in Labour's poll ratings since the election, and in the favourability ratings of its leading politicians, has given many Conservatives the impression that getting back into power will be a far simpler task than they had previously imagined.

This is dangerously optimistic. As the quantitative and qualitative work for this report shows – and indeed the results of the election in July – the Conservative brand is still deeply tainted and mistrusted. In particular, the party is viewed as having broken its promises, whether through malice or incompetence, on all three of the issues that voters cared most about: the NHS, immigration and cost of living.

The research for this project shows that there is a way back for the Conservative Party, and for those who believe in conservative principles. In particular, our research shows a striking overlap in values between those who voted Conservative in 2024 and those who supported the party in 2019, but subsequently defected (or simply stayed at home). There is, in other words, a universe of potential Conservative voters, broadly united in terms of their philosophy and priorities, that is large enough to take the Tories back into power.

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However, there is also a significant problem here. The views of that coalition of voters map seamlessly on to traditional Conservative values on a range of issues, especially social and cultural issues – controlling migration, supporting the family, punishing criminals and so on. The challenge for the Tories there is simply proving they can be trusted.

On the economy, however, it is a different story. Currently, there is a limited appetite and audience for traditional low-tax, small-state Conservatism, at least as long as it is perceived to endanger funding for the NHS. That may change after a term of Labour government. But if the Tories want to return to power, and implement the kind of policies that can restore growth, they need to do a much better job not simply of pandering to their voters, but of educating them.



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