UK IN A CHANGING EUROPE

THE STATE OF PUBLIC OPINION: 2023

FOREWORD

A lot has changed since Boris Johnson celebrated 'smashing' the 2019 election. Since then, we've faced a global pandemic, two wars, and spiralling inflation and interest rates. Britain has lived through a tumultuous period.

The same period saw Labour choose a new leader, whilst the Conservatives elected two. 'Levelling up' became the latest buzzword. 'Partygate' was followed by a series of allegations about impropriety at the top of government. Nineteen by-elections took place, for reasons ranging from resignations to recall petitions. As the cost-of-living crisis worsened, voter concern about the economy rocketed, whilst interest in Brexit declined.

As we approach the next general election, understanding what the public makes of these developments, and how opinion and voting behaviour has shifted since December 2019, is crucial. This report draws on the expertise of over 45 of the UK's top experts on public opinion, British politics and voting behaviour to try and do exactly that.

I would like to express my thanks and appreciation to all those who have contributed to this report, who throughout have responded with good humour to repeated comments, queries and edits.

I'd like to express my gratitude to the members of our team – John Barlow, Stephen Hunsaker, Joelle Grogan, Joël Reland, Jannike Wachowiak and Alex Walker – who took the time to read and edit contributions. Jill Rutter also 'ruttered' a number of pieces.

Thank you also to Rob Ford and Paula Surridge, who helped develop the initial idea for the report, and who have advised on contributors and content throughout. I owe a particular debt of gratitude to Sophie Stowers who contributed disproportionately to both the writing and editing, and without whom this piece of work would never have seen the light of day. We will be rewarding her with 25 minutes of additional annual leave.

As ever, I hope you will find what follows interesting and informative. Please don't hesitate to get in touch if you have any questions or comments.

December 2023

Professor Anand Menon
Director, UK in a Changing Europe

Each article in this collection is the responsibility of its author.

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INTRODUCTION

Anand Menon and Sophie Stowers

In politics, many if not most discussions end up coming back to one key question: what do the voters think? The public are relentlessly focus grouped and surveyed in the quest for an answer, all the more so in the run up to a general election.

Snapshots of public attitudes can help us understand what voters think about a specific issue at a specific point in time. They are not so good, however, in helping us understand how exactly the views, values and priorities of the public have evolved, and the impact this may have on their voting intentions.

This report aims to fill this gap. It examines the key developments in public opinion as it pertains not only to the parties but also key areas of public policy since 2019. In addition, it analyses the demographic, social and economic factors which shape voters' preferences and beliefs.

To begin with the major parties, it hardly needs saying that the fortunes of the Conservative Party have changed dramatically since the last election. As Tim Bale shows, on a multitude of measures, it has slipped behind Labour. Meanwhile, Labour is understandably optimistic following several by-election victories and its consistent lead in the polls. But, as Sophie Stowers warns, there are good reasons why the Opposition should avoid taking a landslide victory for granted. The Liberal Democrats, for their part, have undertaken a clear shift in strategy since their unsuccessful 'Bollocks to Brexit' campaign of 2019, and look (though whether there is a causal connection is a matter for debate) set to profit from anti-Conservative sentiment.

Outside England, the period since 2019 has witnessed dramatic shifts in public opinion. Rob Johns analyses declining support for the SNP. As voters increasingly judge the party on its record, and come to prioritise defeating the Conservatives, support for it has been decoupled from support for independence. Meanwhile, in Wales, Conservative hopes of building on the successes of 2019 were high. Now, however, they face the prospect of another 1997 as Leave supporters and the over fifties abandon the party in large numbers.

In the absence of an Executive in Northern Ireland, public opinion has continued to shift in favour of pro-power sharing moderates, with the public increasingly likely to see a united Ireland as a possibility, and Northern Irish devolution as untenable. Contributions by Katy Hayward and John Garry show how the intertwining issues of the Protocol, power-sharing and Irish unity continue to be crucial to understanding Northern Irish politics post-Windsor Framework.

When it comes to policy, there has been significant fluidity in voter priorities and preferences. Stephen Fisher highlights the ebbs and flows we have seen on green transition and net zero, which are now among the most important non-economic issues for the public. In contrast, Maria Sobolewska underlines how hard it will be for the Conservatives to weaponize the issue of immigration given the centrality of economic issues.

In other areas, though, little has changed since the last election. John Curtice assesses persistently pessimistic sentiments about the economy- even among Conservative supporters. Similarly, around a third of the public have consistently believed that the benefits system has done too little to support claimants since 2019.

Voters of course are complex. Their views are shaped by overlapping demographic, geographic and socioeconomic factors. Bobby Duffy underlines the impact of age, with younger generations tending to be economically and culturally left-leaning. He argues that these same voters are increasingly pessimistic about their future prospects, albeit that McKay, Jennings and Stoker find a similar lack of faith and optimism among voters in general. Dissatisfaction and apathy go some way towards explaining the weak partisanship and increased electoral volatility we have witnessed over time, as is outlined by Dan Snow and Jane Green.

The report also includes a preview of some fascinating and as yet unpublished research. Rob Ford shows that, over the last two elections, school leavers have tended to lean towards the Conservatives and university graduates to Labour. The inversion of this traditional voting pattern interacts with values to shape the priorities of voters as we head toward the next election.

James Kanagasooriam and Sophie Stowers preview their upcoming UKICE report on ethnic minority voters, demonstrating a complex interaction between ethnicity, generation, and religion. Their data (collected before the outbreak of the conflict in the Middle East) also shows that, there has been a small negative shift in Labour support among Muslim voters since 2019. Labour's dominance among ethnic minority voters continues to gradually ebb away, with the Conservatives making inroads among specific ethnic groups.

It would be remiss to reflect on just how much public opinion has shifted since 2019 without talking about the subject which dominated that campaign. As Rachel Wolf and Anand Menon show, few voters have changed their minds about Brexit. The referendum and the identities it crystalized persist. Professors Sara Hobolt and James Tilley show just how strongly ‘Leave’ and ‘Remain’ identities are still held, with a consequent impact on how voters interpret the effects of Brexit. John Curtice similarly outlines how voters view the economic consequences of Brexit. The public is pessimistic overall, but there is a clear difference between Leavers and Remainers.

Equally striking is the issue’s lack of salience. What was once biggest political debate of the day does not now figure in the top ten issues prioritised by the public. Even the most ardent Leavers and Remainers want to talk about something else. This is one reason why none of the major national parties is anxious to make the future of the UK-EU relationship an electoral issue.

We have presented here a rapid overview of some of the report that follows. Space constraints preclude a full discussion of all the contributions. For a comprehensive picture of just how public attitudes and voting behaviour in the UK have changed since 2019, and a preview of how things might shift at the next election and beyond, we wholeheartedly recommend reading the report as a whole.

CONTENTS

THE POLITICAL PARTIES

THE CONSERVATIVE PARTY

Professor Tim Bale

British voters have fallen out of love with the Conservative Party - and hopes that Rishi Sunak might persuade them otherwise are fading fast. On almost any measure, the Conservatives have fallen behind Labour. And while the Leader of the Opposition, Keir Starmer, may not be that popular, he is generally seen as a better bet than Sunak. According to Savanta, back in November 2022 some 38% of the public believed that Sunak would make the better prime minister, compared to 35% who said the same about Starmer. A year later Sunak's score had dropped by six points to 32%, while Starmer's had risen by the same amount to 41%.

The last general election delivered a comfortable 11.5point win for the Conservatives, giving Boris Johnson a substantial Commons majority. Now, however, average headline voting intention figures put Labour ahead by between 15 and 20 percentage points. Yet it wasn't immediately downhill from that election. Indeed, the Conservatives widened their lead in the early weeks of the pandemic in 2020, only to see it shrink to virtually zero in the chaos that followed and then bounce back to around ten points with the vaccine roll-out in the New Year of 2021.

By the late autumn of 2021, however, Labour had drawn level, and the Conservatives have been in trouble ever since. The Partygate revelations and atmosphere of crisis around Number Ten were bad enough. But the premiership of Liz Truss proved even more disastrous, widening what had been a Labour lead of around 10% to an incredible 30 points in a few short weeks.

True, Truss' replacement by Sunak saw a recovery from the nadir, with the gap between the parties halving in the spring of 2023 to some 15 points. However, since then, any recovery has stalled, with Politico's latest poll of polls putting Labour on 46% and the Conservatives on 26%.

This should come as no surprise in view of the economic difficulties facing the country and the state of public services, particularly the NHS. It also chimes with Sunak's own poll ratings. He became PM on 25 October 2022 with an average net prime ministerial approval rating of +4, which briefly rose to +8. Since then, however, his ratings have declined, and since January 2023 have essentially flat-lined for months, with approval running at under 40 % and disapproval over 60%.

Even this may flatter to deceive. On a different measure - namely when voters are asked whether they have a favourable or *un*favourable view of a politician or a party - Sunak's rating fell to a new low of minus 41% at the end of August 2023, even though the Conservatives 'recovered' slightly to -48. A mere 8% said they had a favourable view of Sunak but an unfavourable view of the Conservatives - not many more than the 5% who said the opposite - suggesting Sunak is no longer much of an asset. Some 60% of those asked had an unfavourable view of both leader and party. This compares with the 45% who said the same of Starmer's Labour.

While Labour's rating is hardly stellar, it can take some comfort not only from Conservative scores but also from some polling which suggests that voters see Starmer and Labour as ideologically closer to them than Sunak and the Conservatives. Asked to place themselves on a left-right scale running from zero to ten, the (mean) average self-placement was 4.6, with Starmer placed at 3.9 and Labour at 3.3. However, voters placed the Conservatives further away at 7.6 and Sunak at 7.3.

The Conservatives have also fallen behind Labour when it comes to handling the issues voters name as priorities - most worryingly, on handling the economy, where, according to YouGov polling over the summer, only one in five people thought they were the best party compared to one in four who named Labour. Eight out of ten voters thought the government was handling the economy badly.

The same was true of the NHS, where the Conservatives trailed Labour by 12 points to 40 as best party, and of immigration - long seen by Conservative MPs as one of their electoral trump cards - where the party trailed Labour by 17 to 22 points. Indeed, practically the only good news for the Conservatives was that they continued to outperform Labour as the best party to handle Brexit. Yet even there the gap between the two parties was a mere four points, and with two-thirds of voters saying the government was handling that issue badly.

It will come as no surprise if numbers like these provoke further disquiet in Conservative ranks over the coming months. Such division itself, however, risks doing further damage - some 66 % of voters were telling YouGov in mid-August 2023 that they thought the Conservatives were divided, compared to just 35% who thought the same of Labour.

Whether or not 'divided parties lose elections', it is almost certainly the case that governments that look exhausted and no longer in control of events are in severe danger. Unfortunately for the Conservatives, voters seem to have made up their minds: 84% of voters told YouGov in mid-August that they thought the government looked 'tired' and 88% reckoned it was led by, rather than leading, events.

By the beginning of September 75% of people told pollsters More in Common that it was time for a change of government - a figure that included a striking 47% of those who voted Conservative in 2019. Two devastating by-election losses to Labour towards the end of October suggested such polls painted an accurate picture of public opinion.

As the general election draws nearer, then, there may be little Sunak and his colleagues can do other than to focus on his five priorities and hope that something will turn up. Stranger things have happened, of course - but not as often as he would like.

THE LABOUR PARTY

Sophie Stowers

It has been a good few months for Labour. October saw the party overturn huge Conservative majorities at by-elections in Tamworth and Mid Bedfordshire, winning the latter for the first time. These followed victories in Selby and Rutherglen earlier in 2023, giving Labour three by-election swings of 20% in a single year- just one fewer than Tony Blair achieved as leader in the run up to the 1997 election.

These victories seemed to bear out the polls. Labour has been ahead of the Conservatives by an average of 20% in recent months, while consistently leading on support amongst ‘swing’ voters. The party also has an advantage on policy. When asked which party has the best policies, Labour leads on those which are most important to the public, including health, the cost of living, and the economy.

Labour are leading the Conservatives on a number of the policy issues which matter most to voters

Here is a list of problems facing the country. Could you say for each of them which political party you think would handle the problem best?

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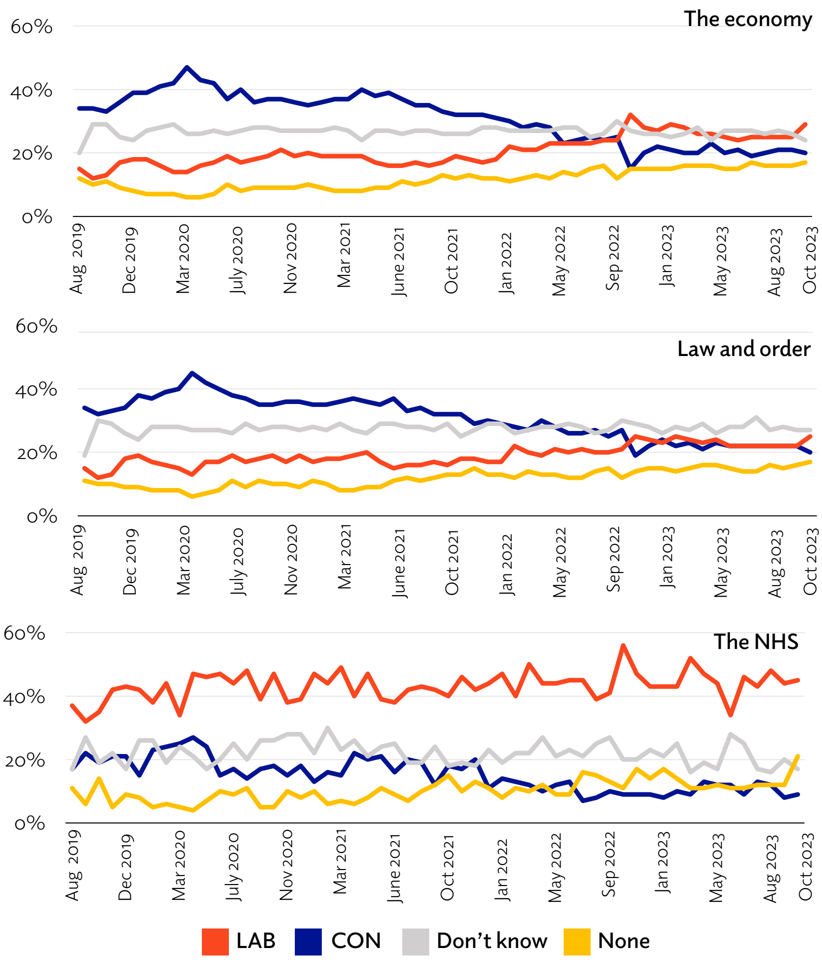

Source: YouGov Labour Party monthly tracker, 2019-2023.

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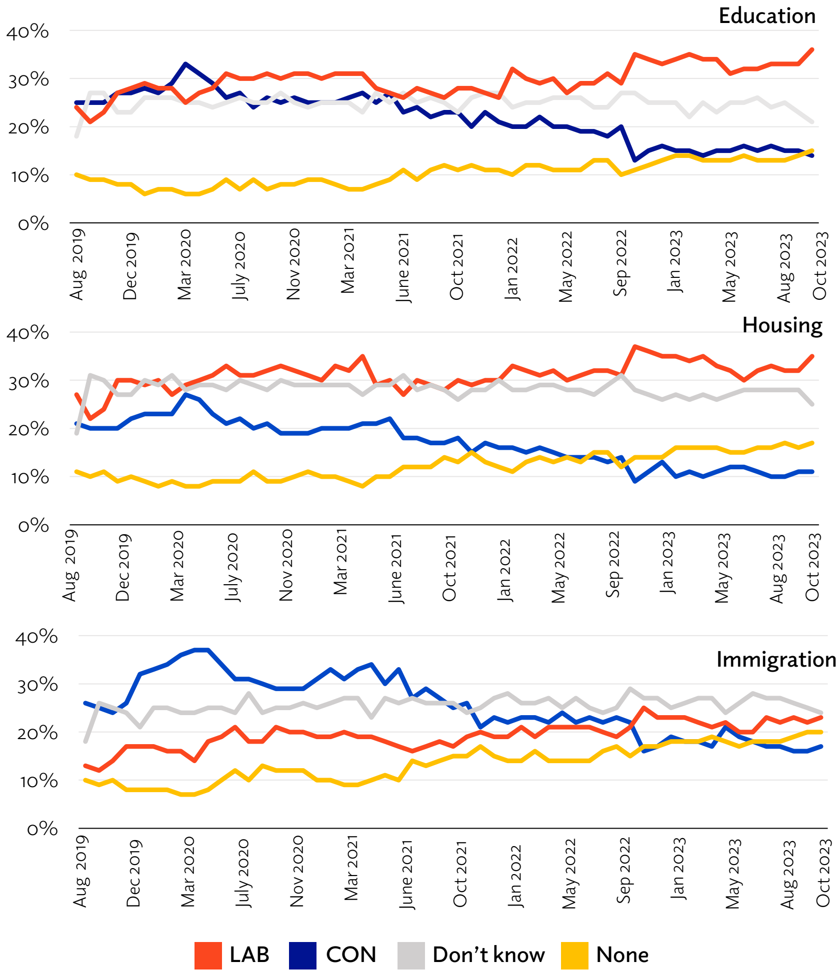


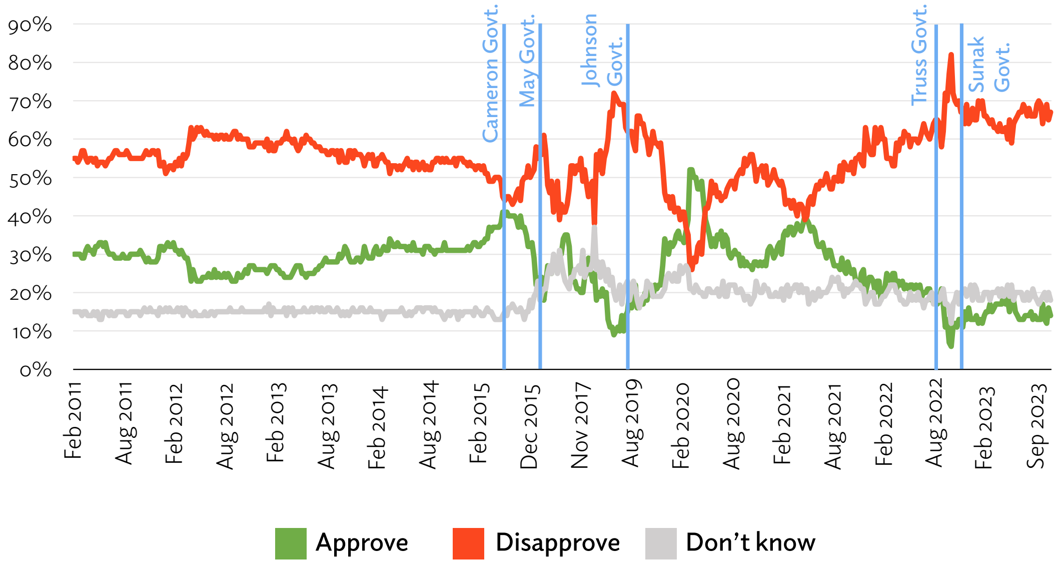
Source: YouGov Labour Party monthly tracker, 2019-2023.

On the economy - the most important issue facing the country according to voters - the Conservatives suffered a collapse in their reputation for economic competence in the aftermath of the Liz Truss mini-budget. Faith in the ability of the government to tackle inflation and the cost of living is low, with 55% expecting the economy to worsen in the next year. Indeed, the party is unpopular with a range of voters - including homeowners (-46 approval), those whose financial situation has deteriorated in the last year (-65) and even those who expect their finances to improve in coming months (-32).

More generally, many voters are ready for a change. This government is obviously unpopular, even among those who voted Conservative at the last election. 65% of voters do not think the Conservatives deserve to be re-elected next time around.

Almost 70% of voters disapprove of the Government

Do you approve or disapprove of the Government's record to date?



Source: YouGov weekly government approval tracker, 2011-2023.

After thirteen years of Conservative government, six in ten voters say it is 'time for a new team of leaders' in Number 10. Following numerous recent scandals - Partygate, the mini budget and ethics violations to name but a few - and after a long period of record inflation, eight in ten voters say they are unhappy with how the current government is running the country.

Sir Keir Starmer, moreover, has a lead over the Prime Minister on key characteristics such as honesty, competence and reliability, all of which are ranked highly by voters when judging a potential Prime Minister. Indeed, Starmer has led Sunak consistently on who can be trusted to 'deliver the change Britain needs', as well as who would be a better Prime Minister since early 2023.

The number of voters who believe Starmer is *not* ready for office is also much lower than was the case for either Ed Miliband or Jeremy Corbyn during their leaderships. There does, then, seem to be a perception among many voters that Labour is finally ready for government.

Yet there are reasons for caution. Whilst public sentiment is anti-Conservative, it is not overwhelmingly pro-Labour. Labour's by-election victories have been in seats vacated by (mostly) Conservative MPs accused of misconduct or implicated in scandal. These are specific, one-off contests in which voters have been motivated to mobilise against the incumbent in the aftermath of wrongdoing.

More widely, while the public's feelings about the government are relatively clear-cut, both in polling and voting patterns, there is a hesitancy around Keir Starmer. Focus groups have described the Labour leader in varying terms, from 'much of a muchness' to 'all fur coat, no knickers'. Voters also struggle to differentiate between him and Sunak, and do not know what the Labour leader stands for (47%). Over half of those asked said that Starmer has said 'too little' about what he would do if he were to win the next election.

Voters are also not quite convinced that Labour will do a good job in government on cutting inflation, growing the economy and improving the NHS. Rather, they just think they would do a better job than the current government- a low bar to clear given levels of disapproval about the incumbent's performance. There is not overwhelming public confidence about Labour's ability to deliver.

The public does not have great confidence that Labour could deliver on the economy, NHS or immigration in government

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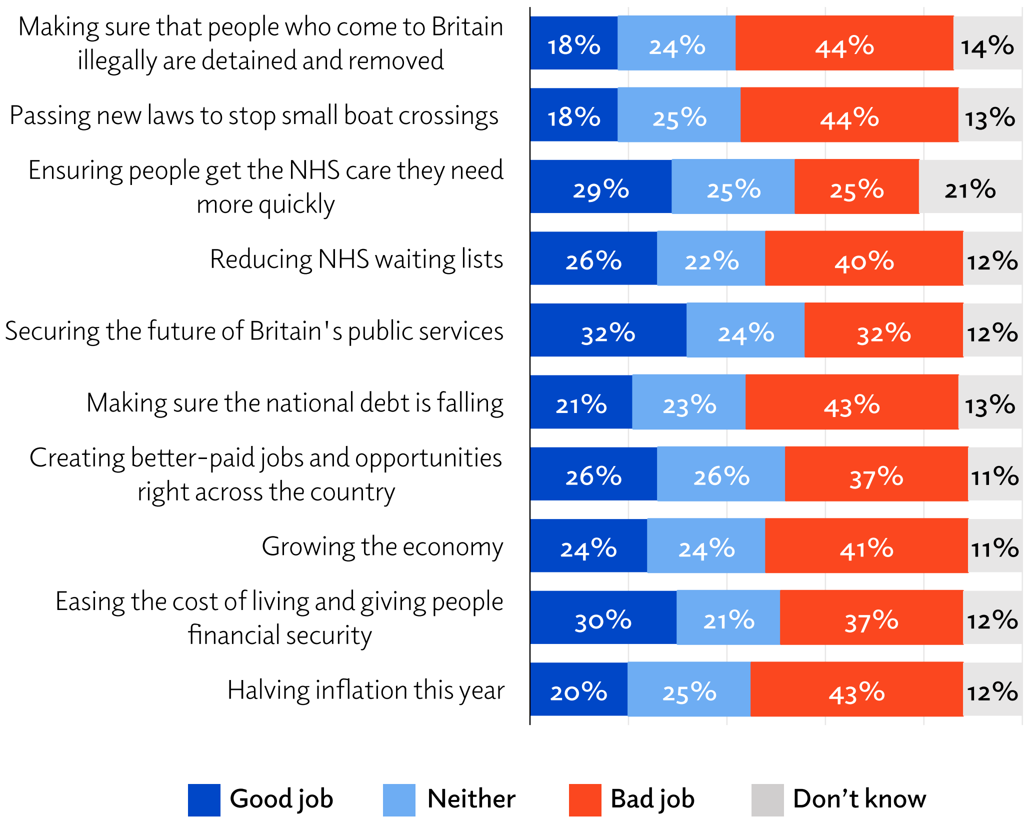
Do you think a Labour government led by Keir Starmer would do a good job or a bad job, if either, at delivering in the following areas if they were in office?



Source: Ipsos Political Monitor, October 2023.

With a large poll lead for Labour, this might not seem relevant. Regardless of how unsure about Starmer or wary of his promises voters are, Labour seems on course to be the governing party after the next election.

But a significant proportion of voters stills say they are unsure how they will vote at the next election, split between a variety of anti-government parties, from Reform to the Greens. One thing a majority are sure of, though, is that they will vote. Many of them are 2019 Conservatives who 'lent' their vote to the Tories to 'get Brexit done' and were crucial to flipping red wall seats at the last election. If Labour wants to claim back contested seats in the North and Midlands, attracting these voters will be crucial.

Indeed, it is important to consider the scale of the challenge facing Labour. After a record defeat in 2019, the party needs to win 124 seats for a majority of just one. Anti-Tory sentiment may help Labour gain seats, but far from guarantees a majority- not least as an election is still some way off. To ensure that the public mood is not just 'anti-Tory' but proactively pro-Labour, and to win over those dithering 'don't know' voters in key seats, Labour will have to boost the public's confidence in its ability to deliver.

Propagating a 'pro-Labour' mood will also be important to bolster the party against any controversies or electoral wobbles it may face. For the moment, the recent drop-in support for Labour among ethnic minority (particularly Muslim) voters in the aftermath of the Israel/Gaza conflict could impact results in those constituencies with a large proportion of Muslim voters but will likely be counteracted by the party's national popularity overall. When facing future controversies, the party may not be so lucky.

After Keir Starmer's conference speech, polling showed an increase in the number of voters who believe the Labour leader has a 'clear plan for the country'. It may be that a general election campaign will solidify his image and Labour's lead with the public.

But the party cannot rely merely on Conservative unpopularity to do the job for them. If Labour wants to secure a healthy majority, it will have to do more to convince voters of its competence and vision for the country.

THE LIBERAL DEMOCRATS

Dr Alan Wager

In the summer of 2019, the Liberal Democrats made the decision to become the 'Bollocks to Brexit' party. Since then - as Rachel Wolf and Anand Menon set out elsewhere in this report - the popularity of Brexit has plummeted, yet the party has distanced itself from the Europe issue.

Instead, it has, in traditional Lib Dem style, become a 'Bollocks to Boris' force: a series of by-election victories in suburban and rural England demonstrated voters were willing, once again, to see the party as a viable alternative to the incumbent Conservatives. It is not so much that voters' views of the Liberal Democrats have changed since 2019. Rather the party has benefitted, in places where the Labour Party are not seen as a viable option by voters, from the collapse in the Conservative brand. Keeping any expletives about Brexit off the party's infamous and abundant party leaflets has been viewed, rightly or wrongly, as central to that strategy.

Rishi Sunak initially appeared to represent a challenge to a party that, under the leadership of Ed Davey, has styled itself as a moderate force that could attract Tory voters who disliked Boris Johnson. Lib Dem voters were initially willing to give Sunak a hearing. Yet as the Prime Minister began to construct a strategy to rebuild the core Conservative vote - by weakening net zero targets, focusing on migration and moving his party to the right - his appeal seems to have faded. Instead, the evidence suggests that Sunak's strategy has left his government exposed to the Liberal Democrats.

While the 2019 campaign was disappointing for the Liberal Democrats, it left the party positioned in dozens of constituencies as the principal challenger to the Conservative Party. If the party targets its resources effectively in the places where it remains a clear second, its anti-Conservative stance is likely to bear real dividends.

Opinion polling in this parliament for the two largest UK parties resembles a rollercoaster track: in 'polls of polls', both have registered highs of over 50% and lows in the early 20s. For the Liberal Democrats, it resembles a comatose patient on life support. The party's national poll rating has hovered stubbornly around 10%, with occasional spikes following by-election successes. The number who told Ipsos they 'don't know' what they think about Sir Ed Davey's performance was 44% in September 2023. This is lower than the 55% registered in September 2020, but hardly represents high level name recognition for the party leader.

Yet, if you speak to senior Liberal Democrats, they are relatively sanguine about the party's static national position. There are two things they tend to point to in mitigation. First, Liberal Democrats always struggle with national cut-through until a General Election. This is true up to a point: in 1997-98, Paddy Ashdown's net leadership rating was often higher than that of Tony Blair during his honeymoon. Charles Kennedy was a national asset for the Liberal Democrats, yet less than half of voters did not have a view on him until the 2001 election campaign. The key question is whether, once the general election campaign begins in earnest, Davey has the capacity to cut through the noise.

Second, the party also maintains that national polling simply does not matter. Instead, it is fighting three dozen or so individual fights, principally in a 'yellow halo' of support in west London and the home counties and some of its former areas of strength in the south west. This is why they have repeatedly ignored calls from external figures, and some pressure from party members, to pursue a more assertive position on Brexit.

Instead of winning votes everywhere, the party wants to gain a parliamentary foothold somewhere - and those places, particularly since the Tory collapse since 2021, are often in places that voted Leave in 2016. Again, 1997 - an election in which Ed Davey first entered the House of Commons - provides the route-map which the party hopes to follow: despite more than doubling its number of MPs, the party's national vote share dropped by 1%.

The success or failure of this constituency-focused strategy will be judged by the number of seats the party secures at the next election. At present, it can reasonably hope for a night of significant gains - a range of 20-30 seats, possibly doubling their number of MPs from the current 15. A central target is that the party leapfrogs the SNP to be the third party in the House of Commons, bringing with it extra parliamentary power and time on broadcast media.

At present, it looks unlikely that the party will be in a position to hold the balance of power. But if the polling gap between Labour and the Conservatives narrows - as historical precedent suggests it is likely to do - then Westminster will begin to ask what price the Liberal Democrats would be able to extract in a hung parliament. This has traditionally been a mixed blessing for the party: something that gives it greater relevance and political currency but makes it more difficult to attract voters from both main parties.

However, this time their negotiating leverage is more limited: Keir Starmer can be assured a repeat of the Conservative-Liberal Democrat coalition of 2010 is impossible to imagine. Nailing its colours to the anti-Conservative cause comes with electoral benefits but limits the party's ability to extract concessions from the Labour Party.

This election presents a clear opportunity for the Liberal Democrats to return to pre-coalition strength. Yet, as so often, how important a player they will be depends, above all, not on their own policies and positions but the fortunes and fate of their competitors.

THE SCOTTISH NATIONAL PARTY

Dr Fraser McMillan

For more than a decade, the Scottish National Party has been an electoral juggernaut north of the border. The party has won 11 consecutive national votes in as many years and has spent more than 16 years in power at the Scottish Parliament. By the time of the next devolved election in 2026, tens of thousands of voters who weren't even born when the party first came to power in 2007 will cast a ballot.

While this longevity is partially testament to political skill, the SNP's success has been sustained as much by favourable political winds and structural advantages. Its near monopoly on the pro-independence half of the electorate powered it to victory again and again, but there are signs their star is on the wane.

Between bitter internal debates over leadership and strategy, logistical setbacks on Scottish independence and the arrest of previous leader Nicola Sturgeon as part of a party finance investigation, 2023 has been an exceptionally difficult year. And there is evidence - not least Scottish Labour's blowout victory in October's Rutherglen and Hamilton West byelection - that voters have lost enthusiasm for the party. Labour and the SNP are now at roughly level-pegging around 35% in Scottish Westminster vote intention polls. What's changed?

In the years since the independence and Brexit referendums, Scottish voters have realigned on constitutional lines

Referendum vote choice vs. 2019 preference

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Tribe	Referendum Votes	Preference 2019	Change
Yes/Leave	14%	4%	-10
Yes/Remain	29%	35%	+6
No/Leave	20%	25%	+5
No/Remain	37%	23%	-14
Undecided	-	14%	+14

Source: 2019 Scottish Election Study

In the years following the referendums on independence and Brexit in 2014 and 2016, the Scottish electorate realigned along constitutional lines. The Yes/Leave and No/Remain camps shrank dramatically, the former - the only one without a party-political advocate - to outright irrelevance. By 2019, the Yes/Remain and No/Leave factions both swelled in size, attracting roughly equal numbers of switchers from each of the other two camps.

The resulting dynamic, with Yes supporters unified on Europe and much else, was key to the SNP's electoral success. Using Brexit as a pretext to advocate for a second independence referendum, they secured the support of 85% of Yes supporters in the 2019 general election. Meanwhile, divisions on Brexit and broader ideological issues compromised the pro-union vote. The Scottish Conservatives performed best, taking 51% of No backer votes in 2019, while Labour and the Lib Dems attracted just 22% and 16% respectively. Although No supporters outnumbered Yes supporters and were marginally *more* likely to vote for an aligned party, the SNP's stranglehold on the latter won the day.

This dynamic had strengthened by the Holyrood election 18 months later, following Brexit proper and more than a year of pandemic-related public health restrictions - an issue on which Scots perceived the devolved government to have outperformed the UK administration by a significant margin. 91% of those who expressed a Yes/No preference in 2021 voted in line with that view, an increase on the 87% in 2019.

But opinion polling for the last year or so has showed this association weakening. In the Scottish Election Study's most recent poll, just 69% of nominally pro-independence voters said they would vote SNP at the next Westminster election. Labour, meanwhile, previously hamstrung by its weakness among Yes and No supporters, replaced the Conservatives as the plurality choice among pro-union voters and is making some headway with pro-indy voters as well.

Almost 30% of nominally pro-independence voters are not committed to voting SNP at the next General Election

Westminster vote intention in 2023 vs. 2019 by constitutional preference

UK IN A CHANGING EUROPE

Party	Yes supporters	No supporters	Overall change
Conservatives	1% (-0.9)	31.1% (-20.1)	16.1% (-9)
Labour	16.8% (+7.8)	47.2% (+24.7)	34.2% (+15.6)
Liberal Democrats	2.4% (no change)	13% (-3.5)	7.9% (+1.1)
SNP	68.9% (-16.5)	4% (-3.9)	34.2% (-10.8)
Other	11% (+9.6)	4.7% (+2.6)	7.7% (+5.9)

Source: 2023 Scottish Opinion Monitor Survey

Labour are picking up support across the board, attracting 21% of 2019 Tory voters, 47% of Lib Dem voters and, crucially, 20% of SNP voters. Scottish Westminster polling in the second half of 2023 reveals a dead-heat between the nationalists and Labour.

The weakening of the connection between pro-independence attitudes and voting behaviour is a new dynamic which poses an existential challenge to the SNP. The party has hitherto been largely immune to the tendency for incumbents to lose support over time - among Yes-inclined Scots. They were perceived as competent and benefitted from Sturgeon's personal popularity. But the ructions of the past year and an increased willingness to blame the devolved government for issues under its purview are now damaging it.

While Labour is not perceived to have *improved* on these issues, the Conservatives and the SNP have fallen back significantly. Labour now holds a slight advantage over the SNP on education and health and are level on the economy. And while the SNP still lead on 'Standing up for Scotland', their advantage on this issue has been cut almost in half. 59% of Yes supporters rated the party a 10 on this scale in 2021, down to 43% in mid-2023.

Labour now hold a slight advantage over the SNP on education and health and are level on the economy

Trust in parties to handle four key issues 0-10 scale (no trust - a great deal of trust)

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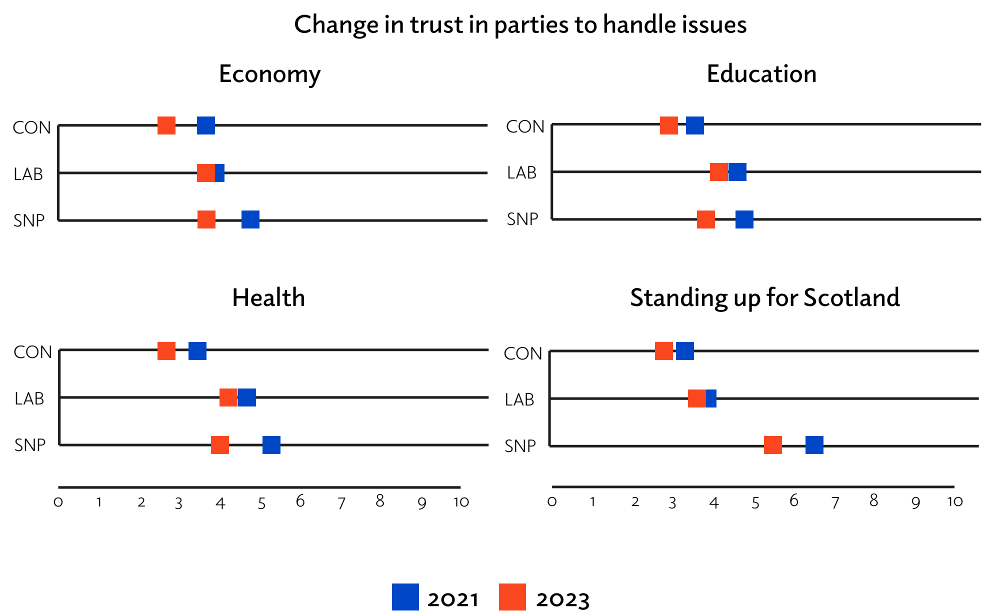


Source: Scottish Election Study May 2021 vs Scottish Opinion Monitor June 2023

New SNP First Minister Humza Yousaf is also less popular than Sturgeon was. Among those who offered an opinion on him in June 2023, the mean rating was 4, compared to 4.7 for Sturgeon in 2019 and 5.4 in 2021. Among Yes supporters, 35% rated Sturgeon a 10 in 2019 versus just 6% for Sarwar in 2023. While Yes supporters still broadly like and support the SNP, its grip on this faction is weaker than it has been for some time due to perceived performance issues.

There is perhaps little Yousaf can do about this in the short term. The Covid pandemic overshadowed Brexit and the bump in Yes and SNP support due to perceived Scottish Government performance on the issue was short lived. The party has hit legal and political dead ends on its efforts to hold another independence referendum, meaning the issue no longer carries the salience it once did. The cost-of-living crisis and struggling public services are top of voters' minds, and the SNP has endured its most difficult year in recent memory.

The circumstances which sustained SNP support have evaporated. While the nationalists once remodelled the Scottish political landscape in their own image, they are now at the mercy of events. How much support they recover from Labour by the time of the next general election depends on how well they're seen to navigate these choppy waters.

NORTHERN IRISH PARTIES

Professor John Garry

In most 'normal' democracies, the big argument is between supporters of the government, who think it's done a great job and should be re-elected, and opponents who think it should be replaced. In Northern Ireland, however, the big debate is about whether we should have any government at all.

The Democratic Unionist Party (DUP) withdrew from the power-sharing executive in February 2022 in protest against the imposition of a 'sea border' between Britain and Northern Ireland resulting from the post-Brexit 'Protocol'. This caused the executive's collapse. And the ensuing Assembly election in May became, unsurprisingly, a mini-referendum on the DUP's anti-Protocol and anti-power-sharing position. What did the voters think?

In the Northern Ireland Assembly Election Study 2022, respondents were asked to choose between two options: 'The Protocol should be scrapped even if it means the end of the Northern Ireland Assembly and the Executive' or 'The Northern Ireland Assembly and the Executive should be maintained even if there are difficulties with the Protocol'. The balance of public opinion was against scrapping the Protocol: among all respondents, strongly among Catholics, and very strongly among Alliance, the Social Democratic and Labour Party (SDLP) and Sinn Féin voters.

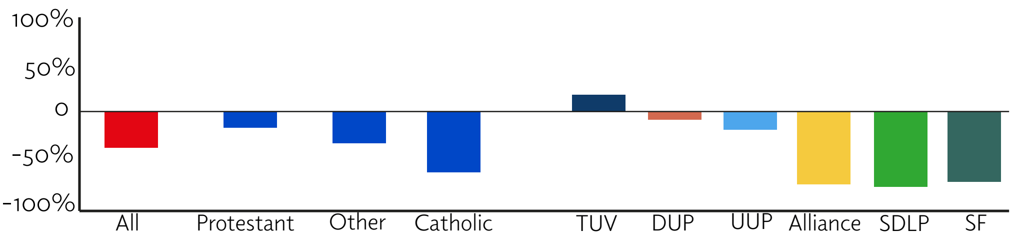
The balance of public opinion among voters in Northern Ireland is against scrapping the Protocol

Which of the following statements do you agree with most?
'The Protocol should be scrapped even if it means the end of the NI Assembly and the Executive'
Or, 'The Northern Ireland Assembly and the Executive should be maintained even if there are difficulties with the Protocol'

Preferences between scrapping the Protocol and keeping power sharing (%)

	All	Protestant	Other	Catholic	TUV	DUP	UUP	APNI	SDLP	SF
Scrap Protocol	14	26	9	4	47	32	25	6	4	3
Keep power-sharing	54	42	43	70	33	39	47	79	83	77
Neither	10	9	18	9	6	9	12	6	6	8
Don't know	22	23	30	17	14	20	16	10	6	12
Net score	*-40*	*-17*	*-34*	*-66*	*+14*	*-7*	*-22*	*-72*	*-79*	*-74*

Net support for scrapping the Protocol and keeping power sharing



Source: Northern Ireland Assembly Election Study, 2022

Protestants and Ulster Unionist Party (UUP) voters are also, on balance, against scrapping the Protocol if it means the end of the devolved institutions. While DUP voters were more evenly split, they leaned towards keeping power-sharing even if there are difficulties with the Protocol. Only among voters for the staunchly unionist Traditional Unionist Voice (TUV) is there net support for scrapping the Protocol even if it means the end of the Assembly and Executive.

The DUP has since been treading a fine line between keeping its hardline supporters happy and appeasing its less hardline supporters by keeping open the possibility of a power-sharing government if it can extract enough concessions from the government on the sea border. A pro-power sharing move would likely be in line with its voters' preferences. As shown below, the balance of opinion is supportive of the idea that power-sharing has been good for Northern Ireland: among all respondents, all religious groups and all parties except the TUV.

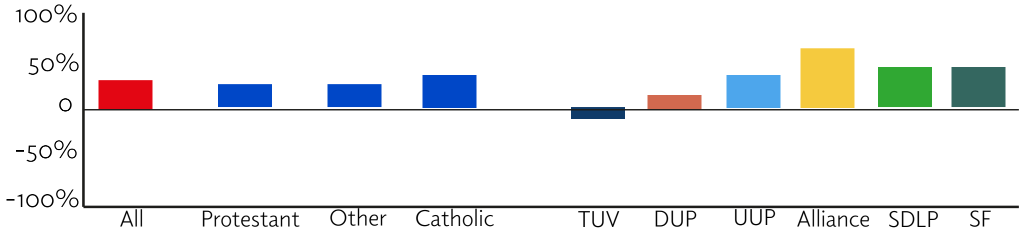
Northern Irish voters are supportive of the idea that power-sharing has been good for Northern Ireland across religions and most parties

Do you agree with the following statement?: 'Overall, power sharing has been good for Northern Ireland'

Level of agreement that power-sharing has been good for Northern Ireland (%)

	All	Protestant	Other	Catholic	TUV	DUP	UUP	APNI	SDLP	SF
Strongly agree/agree	54	53	42	59	33	51	62	80	70	65
Neither	17	15	27	16	17	18	15	7	8	13
Strongly disagree/disagree	20	25	16	18	42	29	21	11	21	17
Don't know	9	7	16	7	7	4	2	1	3	4
Net score	*+34*	*+28*	*+26*	*+41*	*-9*	*+22*	*+40*	*+70*	*+49*	*+48*

Net agreement that power-sharing has been good for Northern Ireland



Source: Northern Ireland Assembly Election Study, 2022

Sir Jeffrey Donaldson, leader of the DUP, has dropped strong hints about a return to government. And he argued that having fully functioning political institutions was essential in articulating the positive unionist case for Northern Ireland remaining in the UK.

The diverse viewpoints among DUP (and indeed TUV and UUP) voters on power-sharing and the Protocol are in sharp contrast with unipolar views on the issue of the Union and Northern Ireland's constitutional future. On this issue unionist voters, practically without exception, row in behind the official party line.

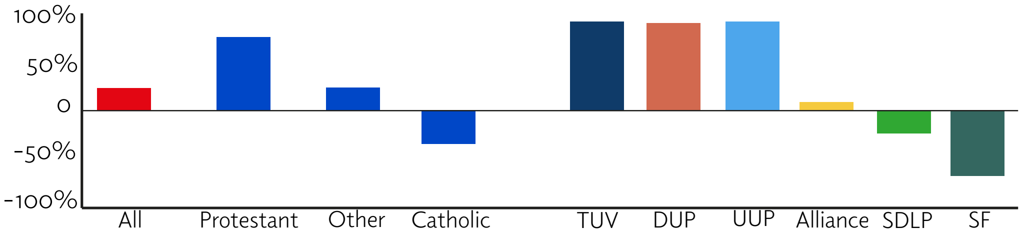
There is evidence of strong partisan views on Northern Ireland's constitutional future

If there was a referendum in Northern Ireland asking people whether they want to remain in the UK or unify with the Republic of Ireland, how would you vote?

Vote intention in a referendum (%)

	All	Protestant	Other	Catholic	TUV	DUP	UUP	APNI	SDLP	SF
Remain in the UK	49	82	46	20	96	89	91	42	27	9
Unify with RoI	28	5	16	54	2	2	2	29	51	76
Would not vote	5	3	9	6	1	2	2	1	5	2
Don't know	17	10	30	19	1	7	6	28	18	13
Net score	*+21*	*+76*	*+30*	*-34*	*+93*	*+87*	*+90*	*+13*	*-24*	*-67*

Net support for Northern Ireland to stay in the UK vs for a united Ireland



Source: Northern Ireland Assembly Election Study, 2022

It is in the nationalist parties that a more diverse range of views exist. Notably, among voters for the 'nationalist' SDLP only half favour Irish unity.

The complex intertwining of the three big issues of the Protocol, power-sharing, and a possible referendum on Irish unity was crucial to understanding the most recent Assembly election. And into the shadow cast by this triumvirate will arrive the next Westminster election. Some parties will be a little more optimistic than others. According to a recent opinion poll, support for Sinn Féin (31%), the DUP (26%) and Alliance (15%) is a little higher than it was at the May 2022 Assembly Election, while support for the UUP (10%), the SDLP (6%) and the TUV (5%) is somewhat lower.

THE GREEN PARTY

James Dennison

2023 seems to have heralded a new chapter for the Green Party- at least in England. There, the party doubled its number of councillors to 736 in the May local elections, around 6% of all seats on offer, and a majority in one local council, the first for a Green party in the northern hemisphere. They also became the lead coalition partner on seven other councils. Estimates suggest that the Greens won around 12% of the national vote, a similar figure to that in the 2019 European Parliament elections (held under a proportional system).

The party now enjoys a growing local profile, boosted campaigning capacity, and the critical mass to be the main progressive opposition party in footholds scattered across the country. Insiders are now licking their lips at the potential for a long sought-after second Westminster seat, with fears of post-Brexit irrelevance with the loss of proportional elections seemingly allayed.

Ironically, some of the party's current success stems from having had the rug pulled from under them by the election of Jeremy Corbyn as leader of the Labour Party eight years ago. That markedly changed the demographic and ideological profile of their voters from a clear, left-wing, university-educated, urban segment of voters in 2015 to something far more balanced demographically and ideologically in 2017 and 2019.

At this year's local elections, the party's most prominent gains came in historically Conservative areas. The Greens often acted as the only 'progressive' party standing in wards—like Mid-Suffolk—in which two decades of campaigning had already planted a 'Green' flag in the ground. Similarly, the party's central executive committee had the strategic nous to sense Tory weaknesses in areas falling between the cracks in the 'red' and 'blue' walls, with plenty of anti-Tory voters to be mobilised. By contrast, the Greens lost 13 seats to Labour in their still-presumed stronghold of Brighton and Hove, where they found themselves the subject of anti-incumbent voting.

Although the Greens are benefitting from progressive voters having a better tactical sense of who to vote for, public views of the party overall are notably stable. According to the British Election Study's 2014-2023 panel, voters have maintained a view of the party as left of centre since at least the 2014-15 "Green Surge" in membership and as a full-blooded pro-European party since the 2019 European Parliamentary elections. By contrast, and undoubtedly of delight to party insiders, the Greens have seen a steady increase in mean 'likeability' scores over the last decade, reflected in a rising *mean* 'propensity to vote' score on a similar scale.

These more secular changes are combining with, and likely buoyed by, episodes of intense environmental concern that help Greens parties across Europe.

Part of the reason for more efficient tactical voting by progressives is a stabilising new political geographic equilibrium whereby respective constituency party systems have come into clearer focus to voters following a decade of political upheaval. These changes led British political strategists to focus heavily on political geography, with the national 'swingometer' relegated to the past. However, the off-cuts of this strategy—examples of which included Cameron's 'decapitation' of the South-West, the switching 'red wall' and now 'blue wall'—have left opportunities that the Greens are filling. These tend to be non-wealthy rural constituencies just as fed up with 13 years of poor governance but lacking the compelling narrative that contiguous constituencies offer commentators.

How the Greens balance the differing profiles of this newfound coalition of voters—particularly when expected to deliver in fiscally weakened local governments—remains to be seen. Indeed, balancing NIMBYism and left-wing economics has already proven challenging. That said, Labour will face similar challenges both locally and nationally and Keir Starmer has set few pulses racing.

In Scotland, the Greens have supported the SNP-led Government with two junior ministers since 2021. However, the embattled SNP are, in some quarters of their membership at least, turning on their governing partners as a source of their woes. Diminished support for the government and independence will likely hurt the Greens less than they do the SNP, however.

The Scottish Greens were always less of a "big tent" party and were already wholly reliant on the Scottish Parliament's more proportional regional vote—rather than its constituency one—whereas the SNP relied on more volatile forces including a Conservative Westminster government for legitimacy. That said, the Greens will likely struggle to find themselves back in government after the 2026 Scottish election, unless voters' views of Labour have already turned sour by then. The Northern Irish Green Party face a more depressing outlook, suffering a major setback at the 2022 Assembly elections and being squeezed by the sheer number of parties, frozen politics, and an unfavourable issue agenda.

In Great Britain, by contrast, Conservative and SNP woes should help the Greens—at least in terms of Westminster vote share—as a looming Labour landslide frees left-wing voters from the constraining logic of first-past-the-post which can impel 'progressives' to vote Labour, however reluctantly. Overall, decades of painstaking local campaigning, heightened environmental salience, episodic national relevance, savvier progressive voters, and a new political geographic equilibrium—as well as enough fuel left in the tank in Brighton—combine to give the Greens a real chance of a second seat at the next general election.

SUBNATIONAL POLITICS

LOCAL GOVERNMENT

Professor Tony Travers

With all the discussion of 'levelling-up' that has taken place since 2019, there has been an increased focus on local authorities and their powers and influence in regions across England. Regeneration-focused grant streams related to levelling-up, the creation of additional combined authorities and mayors, a slight increase in real terms expenditure (certainly compared to the period 2010-19) and the on-going financial problems affecting several councils in England have all drawn public attention and media scrutiny in the time since the last election.

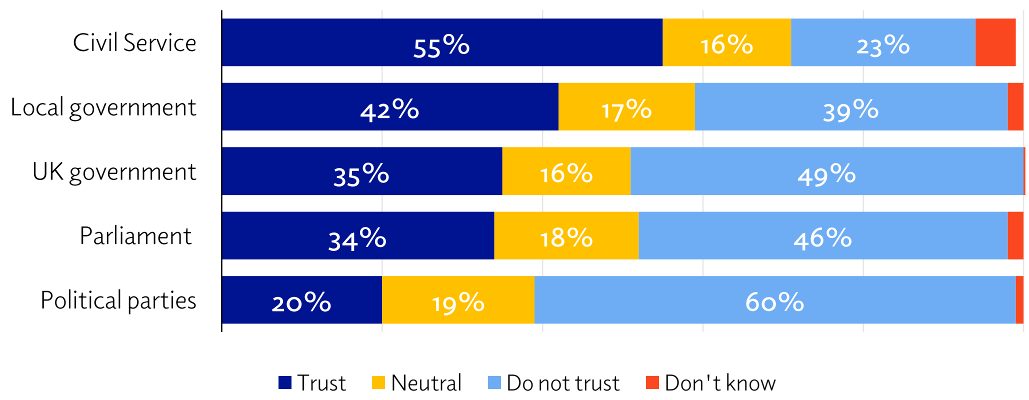
Yet the overarching message from public opinion polling on subnational government seems to be that, against a backdrop of instability and periodic turmoil at the heart of UK national government in recent years, councils and combined authorities are an oasis of relative calm.

Indeed, polling and other opinion surveys about sub-national and local government since the 2019 general election show that people in the UK trust local government more than Westminster and Whitehall. This trend is not new but continues to be a factor in understanding government and politics in the UK. Office for National Statistics data for 2022 showed higher levels of trust for local government than for an array of institutions, including the government, Parliament, or any of the main political parties.

People in the UK tend to trust local government more than institutions in Westminster and Whitehall

UK IN A CHANGING EUROPE

Levels of trust in political and government institutions

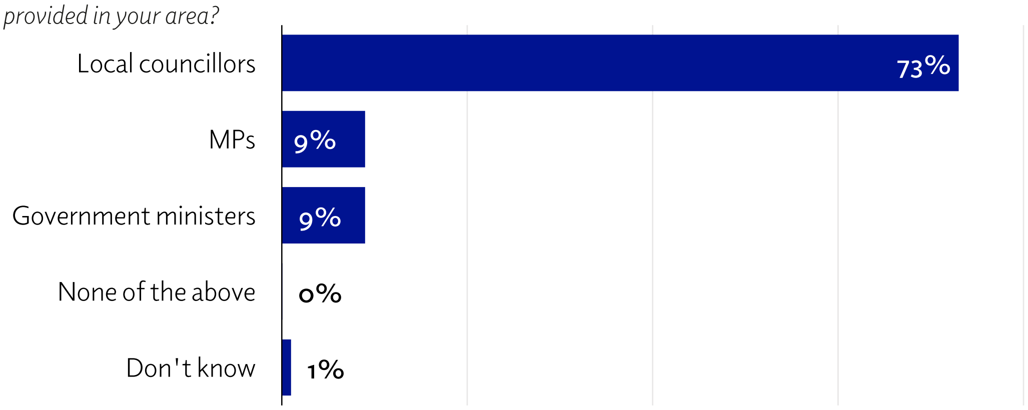


Source: *Office for National Statistics Trust in government, UK: 2022., July 2022*

Opinion polling commissioned by the Local Government Association tells a similar story. A representative sample of the population were asked the question 'which individuals do you trust most to make decisions about how services are provided in your area? Again, local representatives are considered significantly more trustworthy than those working at any other level of government.

Local representatives are considered to be more trust-worthy than those working at any other level of government

Which individuals do you trust most to make decisions about how services are provided in your area?



Source: Regional polling results, Local Government Association, 2021-2022 data tables

There is a clear lack of enthusiasm about national government by comparison, no doubt explained by the highly centralised nature of the country. Ministers and civil servants make remote decisions about many services which in other countries would be made by regional or local government, leaving important decisions to be taken by individuals who, according to voters, simply do not understand the needs of local communities as well as those closer to home.

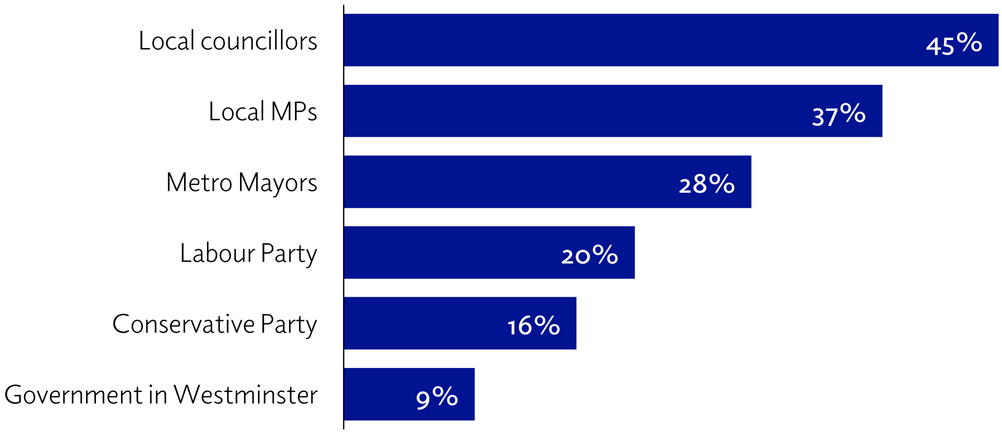
This conclusion is borne out by other polling, published by UK in a Changing Europe, which showed local councillors are significantly more likely to be thought to 'care' for an area than MPs, political parties or the government. Admittedly, metro mayors were thought to care less than MPs, possibly because their areas are geographically larger than Parliamentary constituencies, or because these are relatively new units of government that have not quite 'bedded in' to the public consciousness yet. However, city mayors are believed to be significantly more likely to care for their area than central government. Westminster and Whitehall's distance from people is clearly a factor.

Admittedly, satisfaction with councils varies substantially from region to region within England. The chart below shows the extent to which people are satisfied or dissatisfied with local government. There are high levels of net satisfaction (in the East of England, the South West, the North East, the South East and the East Midlands), but far lower levels of net satisfaction in the North West, Yorkshire & Humberside and, particularly, London. Given the substantial degree of 'equalisation' between councils in different parts of the country (more deprived areas generally receive higher levels of grant support than affluent ones), the differences in satisfaction are probably explained by the different make-up of the population - in terms of such factors as age, affluence, ethnicity and housing tenure - in some parts of the country compared with others.

Voters think that local councillors are significantly more likely to be thought to 'care' for an area than other layers of government

UK IN A CHANGING EUROPE

Do you believe the following groups care about your area? (% answering affirmative)



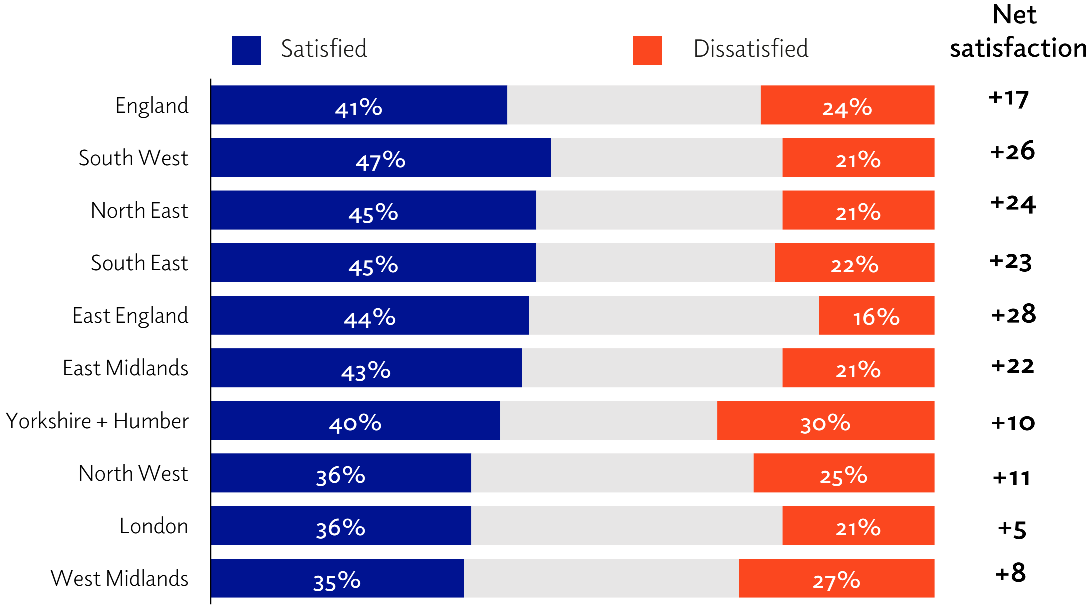
Source: YouGov for UK in a Changing Europe, May 2022

But overall, opinion research suggests that local/subnational government, both institutionally and as elected members, are substantially more trusted and thought to 'care' more than national institutions, MPs and ministers. It is easy to imagine that a perception of instability at the centre, caused by the Brexit endgame, Partygate, Boris Johnson's forced resignation, Liz Truss's financial crisis and revelations about the government's handling of the Covid-19 pandemic have together contributed to a strong sense that national institutions are out-of-touch and failing. Yet councils, despite almost a decade and a half of austerity, have overwhelmingly performed relatively well against the same political backdrop.

The public is similarly wary of the government's 'levelling up' commitments, with polling from Ipsos in the spring of 2023 showing that despite the levelling up commitments from the government, few expect it to have a positive impact. Just 8% think the government will make a positive difference in their local area, with 61% saying it will make no difference and a quarter expecting a negative impact. This follows previous research which found that most people believe the government 'does not care about them or their local area' and recognise an imbalance in Government spending at a local level.

Lower levels of satisfaction with local government are found in parts of the North, West Midlands and London

Satisfaction or dissatisfaction with the local council, by region (2021)

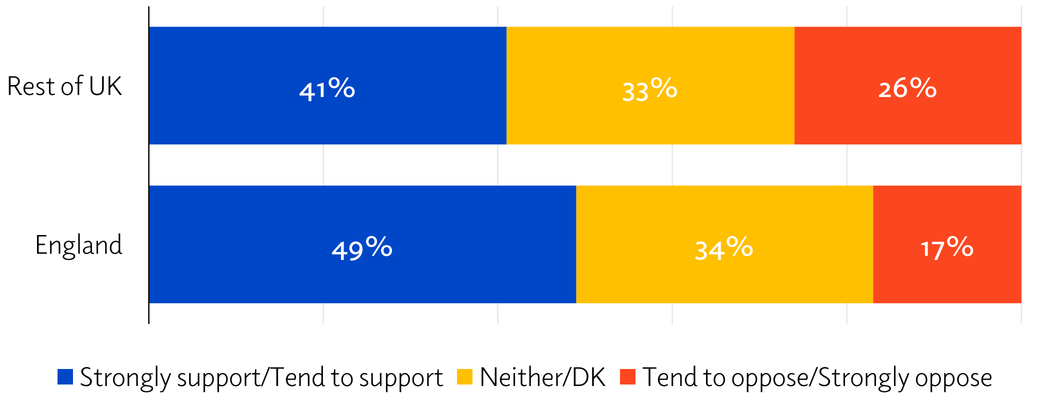


Source: Ipsos attitudes towards local areas polling, 2021

In contrast, devolution and more localisation of powers is supported, notably in England. The same Ipsos research asked people in England and the rest of the UK about their support for elected regional or county mayors, finding support for both increasing powers for local leaders and local authorities.

The public generally support increased powers for local figures such as elected mayors

Support for a directly elected mayor in regions or counties with more control over decisions such as public spending in the local area



Source: Ipsos Levelling Up index, February 2023

Separate research by Savanta for the Centre for Cities concluded that 83% of people in city regions voting in the 2021 local elections supported greater devolution. In other words, where devolution had already taken place, it was even more popular than in the rest of England.

At a time when liberal democracy is under pressure globally, research suggesting that devolved and local government are more likely to be trusted by voters than Westminster and Whitehall, is important. In a country as centralised as England the risk that distant, national government undermines trust in the wider system of democracy is a serious issue. The same is likely to be true to a possibly lesser extent in Wales, Scotland, and Northern Ireland. As parties prepare their manifestos in 2024, the lack of trust in centralised government should inform their policy proposals.

SCOTLAND

Professor Rob Johns

In the last general election, the SNP took 45% of the Scottish vote and all but eleven of the contested seats. The Conservatives won six, Labour just one. According to Scottish Election Study (SES) data, 90% of voters voted for a party that shared their preference on independence. With support for independence close to 50% at the time, and the SNP sweeping up most of that Yes vote, this was not hard to explain.

Eighteen months later in the 2021 Holyrood election, the SNP took 47% of constituency votes and all but eleven of the constituency seats. The Conservatives won five, Labour just two. 91% of voters chose a party that shared their preference on independence. With support for independence close to 50% at the time, and the SNP sweeping most of that Yes vote, this was not hard to explain. Sound familiar?

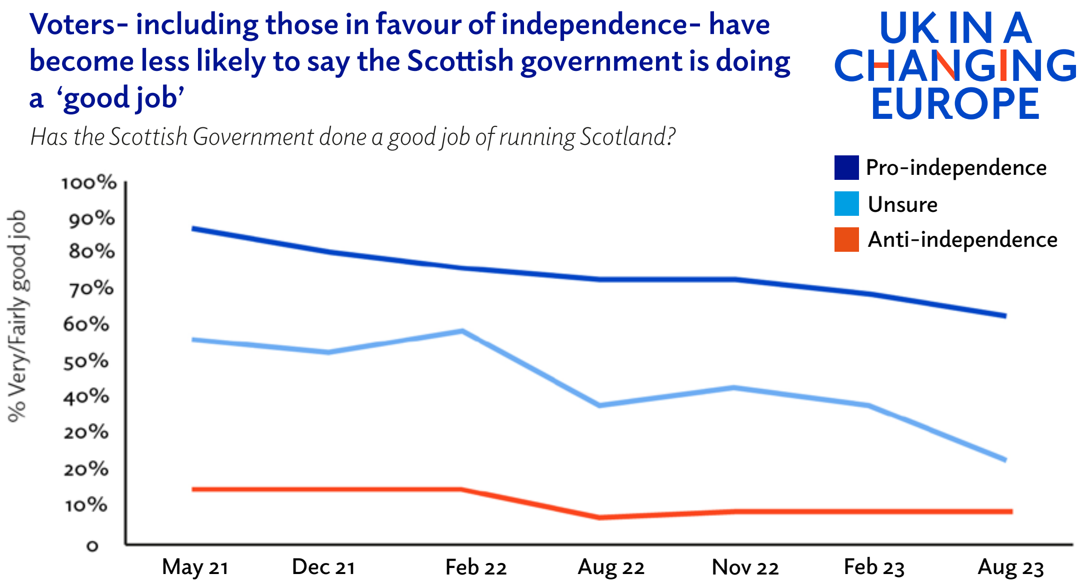
This stasis persisted for the first couple of years of the Westminster parliamentary term. Independence preferences drove votes, whilst nothing seemed to shift independence preferences – at least, not for long. The 2014 referendum seemed to have transformed the terms of electoral trade, with the normal laws of psephology suspended.

One of these 'laws' was the 'cost of ruling': the tendency for parties in government to lose popularity over time, as policy failures or scandals accumulate, as they drift from voters ideologically, or simply as people get fed up with them. By late 2022, the SNP had been in government in Scotland for more than fifteen years and Nicola Sturgeon had been First Minister for eight. Yet the party's poll ratings were buoyant, afloat on a tide of support for independence that showed little sign of receding. Indeed, two Holyrood constituency vote polls in December 2022 put the SNP at 50%: rare for any party in democratic competition.

Just four months later, everything looked very different. Sturgeon had resigned, there was a police tent outside her house, there was no longer a motorhome outside her in-laws' house, and her party was and remains ten points down in the polls. It is not just hypothetical votes that had gone, either. The scale of defeat in the Rutherglen & Hamilton West by-election suggested major losses both to Labour and to abstention. Moreover, polling beyond headline vote intentions suggests that some of the 'fundamentals' have moved against the SNP.

New leader Humza Yousaf's approval ratings remain below the lowest point ever recorded by Sturgeon. He also trails Labour's Anas Sarwar. Meanwhile, according to the SES's Scottish Opinion Monitor of June 2023, the SNP has lost its competence advantage over Labour on health, education and the economy.

Was all this solely the result of 'motorhomegate'? Or did the scandal burst open floodgates that were already creaking? There is reason to suppose the latter. Sturgeon's approval ratings may have surpassed Yousaf's but had been in decline for a couple of years. So have evaluations of the SNP in office, as shown by the dwindling percentage of voters deeming the Scottish Government to have been doing a 'good job of running Scotland'. Crucially, this decline is just as visible among – indeed, is largely driven by – the party's base, who back independence.



Source: Scottish Election Study, 2023

The SNP's electoral success since the 2014 referendum was built on persuading Yes voters that there was still momentum for independence and that the way to maintain that momentum was through SNP majorities. By 2023, with Westminster still flatly refusing an 'indyref2', the party cooling on its own *de facto* referendum proposal, and no sign of a clear majority for Yes in the polls, momentum was lacking. The revelation that the SNP had lost around a third of its members – many of whom had joined in a surge after the referendum defeat – was a clear illustration of this loss of impetus. And, if Yes supporters cease to see much connection between voting SNP and achieving independence, the party's electoral outlook is bleaker.

That is particularly true of the upcoming general election, which on recent polling is a close race between the SNP and a resurgent Labour. Most of the swing voters in that race share two ambitions: independence and removing the Conservatives from office. The more of these voters that prioritise the latter, the more seats Labour will claw back from the SNP. When asked about this dilemma in a June

2023 SES survey, 62% of Yes supporters said that 'getting rid of the Conservative government' would be their priority, almost twice the proportion (34%) looking 'to elect as many pro-independence MPs as possible'.

There is ample time for these priorities to change. But that might mean the gap widening further. The difficulty for Labour in recent elections was to persuade Scottish voters that it had much prospect of replacing the Conservatives in government. This time around, Labour is widely expected to take power.

If Labour could take six SNP seats in 2017 on the strength of the late Corbyn surge, then much bigger gains in 2024 are in prospect. The SNP risks encountering the old argument that Nationalist votes in Westminster elections are wasted.

The big problem for the SNP is the decoupling of support for independence from support for the party. That same decoupling leaves no reason to suppose that an SNP slump in the polls will trigger a slump in Yes support. Sure enough, that support is in the same place - just short of 50% - as it was before Sturgeon's resignation.

Furthermore, the strength of at least some of that support places a limit on the likely scale of SNP electoral losses. Those who identify 'very strongly' as Yes supporters are the least likely to intend to defect from the SNP in the general election, presumably because the dissonance of voting for the pro-Union Labour Party would be too much. The longer-term question concerns the Scottish Parliament election of 2026. That contest will be fully focused on Scottish concerns, including independence. On the other hand, the proportional system removes the party's near-monopoly over Yes support. Fractious relations both within the SNP and with their Green partners open up the possibility of significant splits on the pro-independence side. A return to the 'stasis quo ante' looks unlikely.

WALES

Professor Richard Wyn Jones & Dr Jac Larner

The aftermath of the 2019 general election saw regular attempts to incorporate at least parts of Wales, notably what historian Gwyn A. Williams once termed the 'Costa Geriatrica' in north Wales, into the prevailing 'fall of the red wall' narrative. Given that the Conservative party had just secured its highest ever vote share (36%) and, with 14 out of a possible 40 MPs, its second highest seat share in Wales since the Second Reform Act of 1867, this was hardly surprising. It is easy to understand the lure of the 'even in Wales' punchline for those focused on the Conservatives' stunning election victory.

For close observers of Welsh politics, the interpretative lens was somewhat different. Since their electoral wipe-out in the Blair general election landslide of 1997, the Welsh Conservatives have grown their vote share in all but one subsequent major election - UK or devolved - in Wales. The 2019 result seemed to offer further evidence that the party had not only found a way of countering its historic weakness in Wales but might legitimately hope to muster a genuine challenge to Labour dominance. Little wonder the Welsh Conservatives' spring conference in early 2020 was such a buoyant affair, with hopes high for the party's prospects at the next devolved election in May 2021.

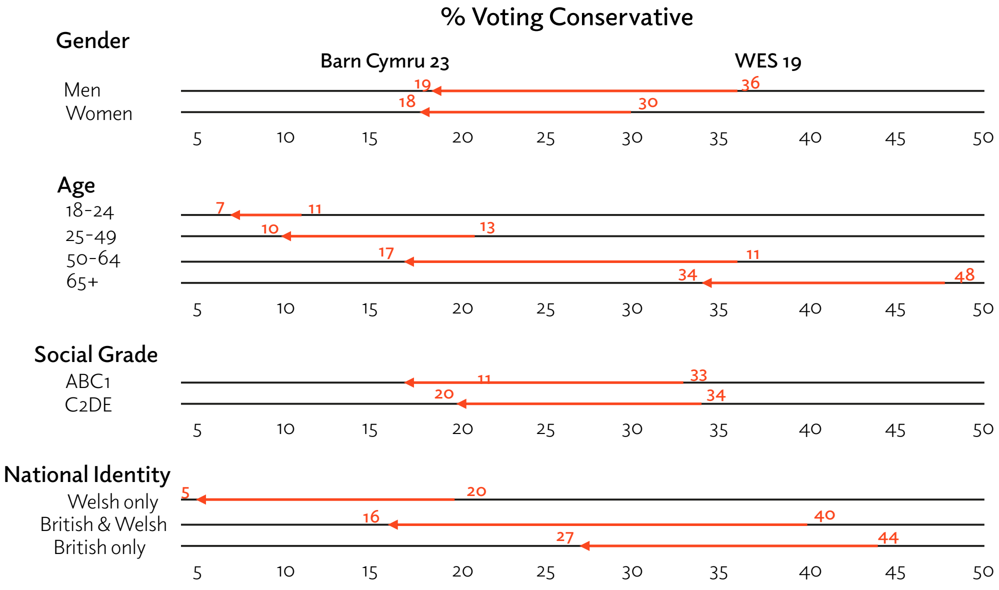
In the event, the 2021 result served as a salutary reminder of the resilience of Welsh Labour and, relatedly, the limits of Welsh Conservative support. The Conservatives certainly benefited from the collapse of UKIP, a party that had performed strongly on the regional lists in the previous Senedd election, held a few weeks before the Brexit referendum. Beyond that, however, with only a single exception, the Conservatives failed to follow through with victories in those constituencies that it had seized from Labour in 2019. Indeed, Labour's strong performance in the southwest suggested that the Conservatives would be unwise to take for granted even those parts of the country that it might consider among its Welsh heartlands.

More recent polling evidence indicates that the Conservative party's prospects in Wales have deteriorated to the point that another 1997-style wipe-out is eminently possible. Data from the 2019 Welsh Election Study and recent Barn Cymru polls conducted by YouGov on behalf of ITV Wales and Cardiff University's Wales Governance Centre shows the unravelling of the party's 2019 voting coalition.

The chart below provides a comparative demographic breakdown of Conservative support in Wales in 2019 and 2023. As is clear, there has been a decrease in support across the board. Particularly relevant, however, is the decline among those groups that have contributed most to Conservative success in Wales in recent years. The over 50s and those who feel British not Welsh, or both British and Welsh, have abandoned the party in droves.

There has been a decrease in support for the Conservatives in Wales across demographic groups

Demographic breakdown of support for the Conservatives in Wales, 2019 and 2023



Source: Jac Larner and Richard Wyn Jones, Wales Governance Centre, 2023

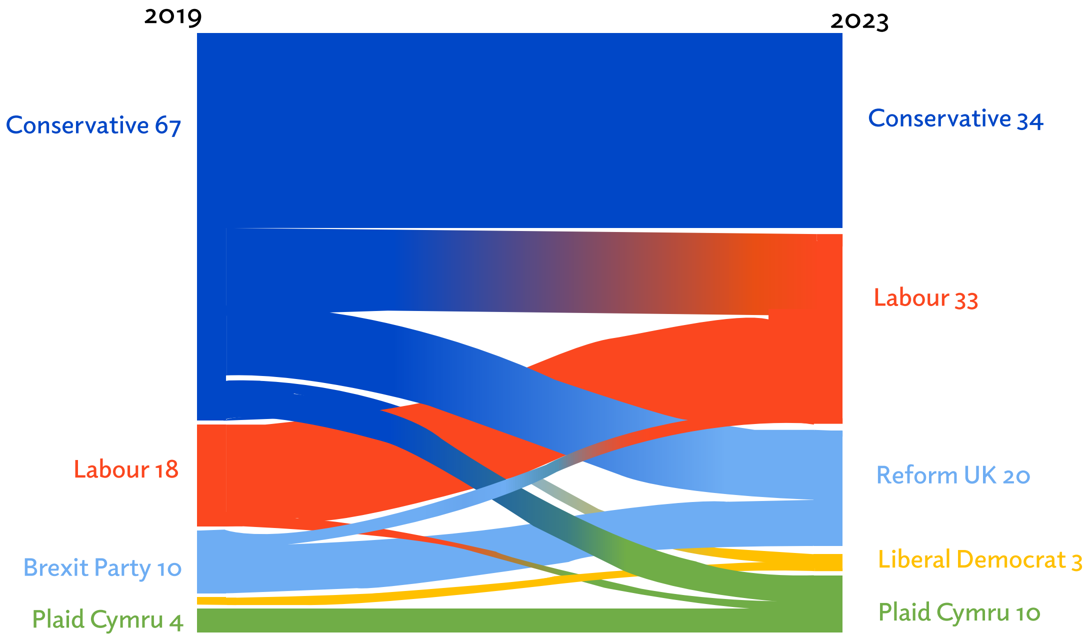
The chart below demonstrates how Brexit supporters in Wales voted in 2019 and how they say they will vote now. Here again we see that a group of voters whose support was key to Conservative success in 2019 has deserted the party - indeed, Conservative support among Leavers in Wales has effectively halved in less than four years.

Projecting election results from these polling results is rendered more difficult than usual by the fact that, at the next UK election, Wales will experience a significant - 20% - reduction in the number of Members of Parliament (from 40 to 32) as part of the move to equalise constituency sizes across the UK.

The map below displays the results of an MRP model we have constructed to allow us to estimate both the outcome of the 2019 election and how things look based on current polling under the new constituency boundaries. It is worth pointing out that, on these notional results, even the sole Conservative hold-out - the revamped Brecon, Radnor and Cwm Tawe seat - is held by a margin of only two hundred or so votes.

Conservative support among Leavers in Wales has almost halved since the last election

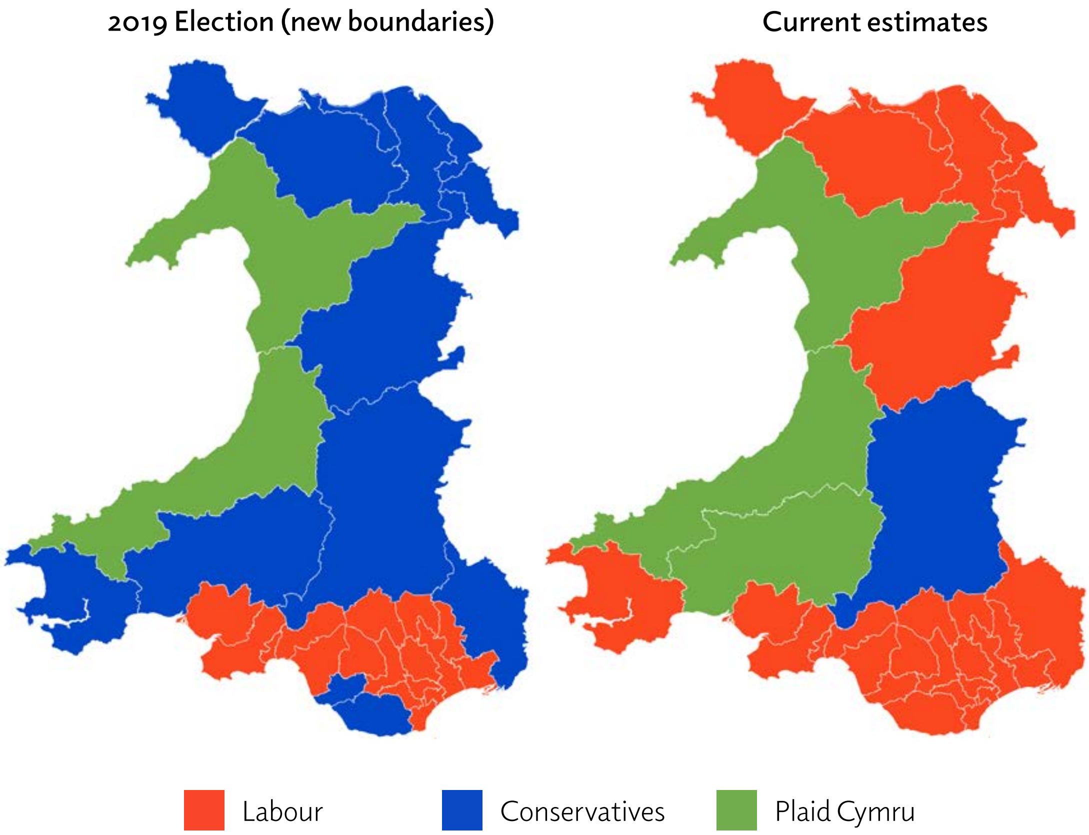
Alluvial of Leave voters in Wales (excluding those who Didn't vote/ Would not Vote)



Source: Jac Larner and Richard Wyn Jones, Wales Governance Centre, 2023

Based on current polling, the Conservatives look set to lose almost every seat they hold in Wales at the next election

MRP model estimates of election results in Wales with new constituency boundaries



Source: Jac Larner and Richard Wyn Jones, Wales Governance Centre, 2023

It requires no special insight to recognise that turning this situation around is likely to prove hugely challenging. However, the Welsh Conservatives are not only running out of time; they also appear to be running out of ideas.

For several years, the Conservatives hoped that they might reap electoral benefits from their attacks on the record of the devolved Labour administration in Cardiff. But thus far, at least, any impact appears negligible. Perhaps the current controversy surrounding the Welsh Government's championing of 20 mile per hour speed limits in built up areas will finally allow the party to shore up its support. The 20% of Leave voters who say that they would support a Reform Party are an obvious potential source of additional votes.

But there are also significant risks associated with the party's incendiary attacks on the Welsh Government, attacks that increasingly veer into attacks on the very principle of devolution itself. While these may play well with the Tory base, the Welsh electorate remains strongly supportive of the principle of home rule, while First Minister Mark Drakeford also remains the nation's most popular politician. Given the historic suspicion of the Conservatives in Wales - a country where the Conservatives won their last general election victory in 1859 - the party might do well to ponder the wisdom of appearing to be 'anti-Welsh'. If present trends persist, then they will soon have plenty of time to do exactly that.

NORTHERN IRELAND

Professor Katy Hayward

For all the infamous complexity of Northern Ireland's politics, everything that has happened over the past four years can be explained in terms of one party and one issue: the Democratic Unionist Party (DUP) and the Protocol on Ireland / Northern Ireland.

Indeed, the future of Northern Ireland could still be determined by what the DUP decides to do with respect to the Protocol. Public opinion, however, seems to be heading in a different direction to the party.

The 2019 General Election saw the DUP lose the privileged position it had enjoyed in Westminster under the terms of its deal with the Government headed by Theresa May. The British electorate gave a mandate to Boris Johnson to 'Get Brexit done', backing the Withdrawal Agreement and, with it, the Protocol on Ireland/Northern Ireland.

In light of its changed fortunes, the DUP turned its attention back to the devolved Assembly and within weeks accepted the 'New Decade New Approach' deal to restore power-sharing after a hiatus of nearly three years. That agreement also accepted the Protocol as a done deal.

On 1 January 2021, the Protocol came into effect alongside the freshly produced Trade and Cooperation Agreement. But before the month was out, the EU's near-triggering of the Article 16 safeguard measures over the circulation of Covid vaccines on the island of Ireland exposed the vulnerabilities of the Protocol. The UK Government's reaction was to unilaterally extend 'grace periods' for its implementation and to threaten its own use of Article 16.

This stance was welcomed by the DUP, which mustered political unionism to press the Government to replace the Protocol altogether. This resistance reached new heights with the resignation of the DUP First Minister in February 2022.

The Assembly and Executive limped on into the May 2022 election. That election was significant for several reasons. The centrist, pro-Protocol Alliance Party more than doubled its share of seats. This came mainly at the cost of other middle-ground parties (Greens, SDLP, UUP), and may thus be seen as a corralling of the 'soft' centre ground around Alliance rather than the emergence of something new.

The DUP lost seats, in part due to a shift in unionist support towards an even more fervently anti-Protocol party (the Traditional Unionist Voice). As a consequence, it also lost its status as the largest party in the Assembly and its right to hold the position of First Minister. Much to unionist consternation, that now lay for the first time with Sinn Féin.

Seeing unionist leverage as lying in the form of protest rather than participation, the DUP used the procedural requirements for cross-community consent to prevent the devolved legislature from convening and a new Executive from being formed. By making the removal of the Protocol a condition of their return, the DUP gave the UK Government reason to claim that the Protocol was undermining the 1998 Belfast Agreement - the very thing it was intended to protect.

After months of negotiation, the UK and EU came to agree the 'Windsor Framework' in February 2023, to adjust the Protocol in light of the issues that public opinion polling had shown to be of most concern, namely the movement of goods (including parcels and medicines) from Britain to Northern Ireland. But although softer unionists warmed to the new deal, strong unionist voters remained determinedly opposed - and apparently in no hurry to see power-sharing restored.

The DUP did not move. When tested in the local council elections of May 2023, they retained their share of seats, albeit on a lower turnout in unionist areas. But the bigger picture was highly disconcerting for them - comprehensively outstripped in vote and seat share by Sinn Féin, who gained votes not only from nationalists but from pro-power-sharing moderates who wanted to 'send a message' to the DUP.

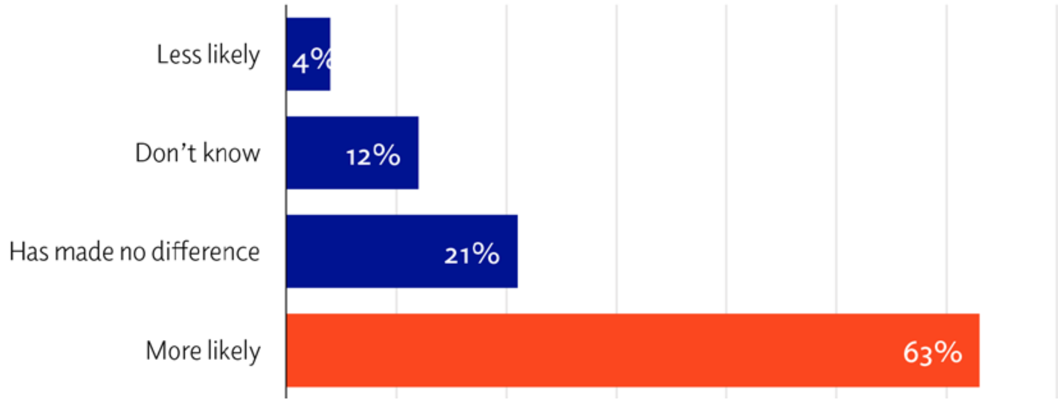
If the DUP's rejection of the Protocol has shaped the course of Northern Ireland politics since 2019, it has also had effects far beyond Stormont. In the Windsor Framework, the UK and EU finessed the Withdrawal Agreement, finding yet more flexibilities for a region characterised by political intransigence. For this, the DUP could claim some credit. But what might be the price to be paid for its gambit?

Public opinion shows that since the Protocol, views on the likelihood and desirability of Irish unification have changed - now two-thirds in Northern Ireland see Brexit as having made a united Ireland more likely (including a plurality of unionists) and 4 in 10 view Brexit as having made it more desirable (including a plurality of those who are 'neither' unionist nor nationalist).

Two-thirds of Northern Irish voters think Brexit has made a united Ireland more likely- including a plurality of unionists

Does the UK leaving the European Union make a united Ireland more likely?

UK IN A CHANGING EUROPE

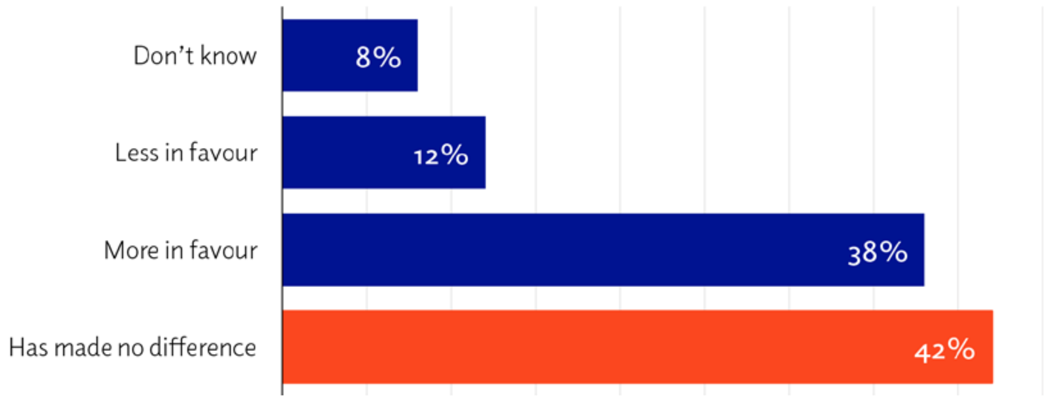


Source: NI Life & Times Survey, 2022

Almost 40% of people in Northern Ireland think Brexit has made a united Ireland more desirable

Does the UK leaving the European Union make you feel more in favour of a united Ireland?

UK IN A CHANGING EUROPE



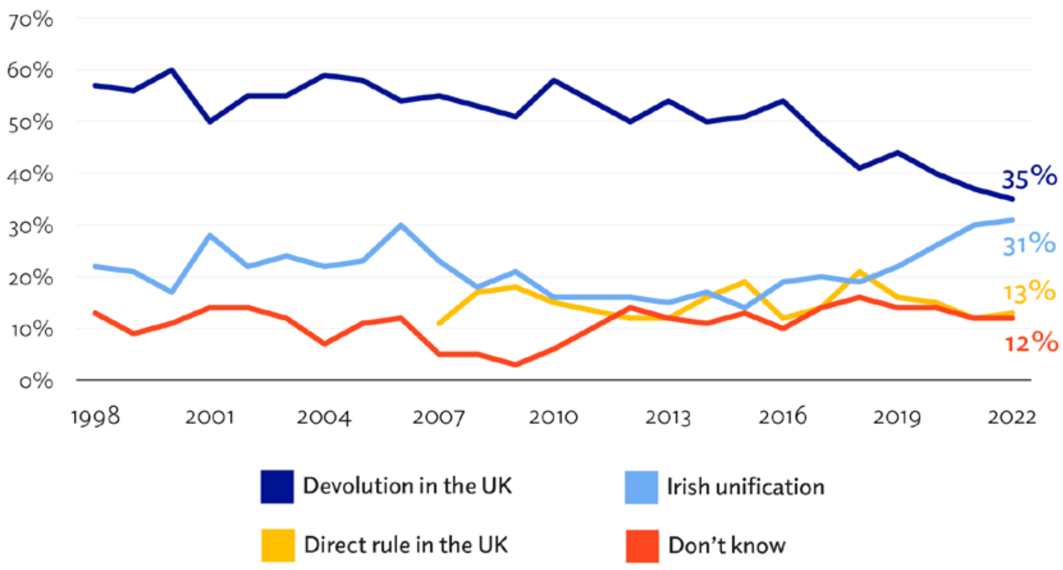
Source: NI Life & Times Survey, 2022

Surveys also indicate that prospects for the union are seen as weaker not only because of the Protocol, but because devolution for Northern Ireland within the UK - the first alternative to Irish unity - is seen to be increasingly doubtful as a sustainable scenario for the long-term.

Public opinion in Northern Ireland is increasingly doubtful about devolution within the union

What do you think the long-term policy for Northern Ireland should be?

UK IN A CHANGING EUROPE



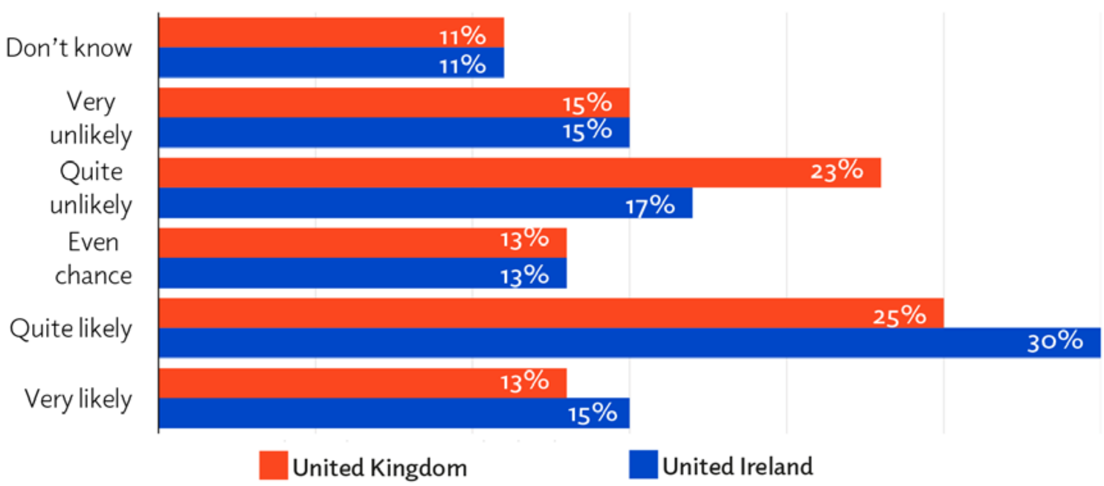
Source: NI Life & Times Survey, 2022

Given that Northern Ireland devolution within the bounds of the union has not functioned as envisaged for four of the last six years, there is little confidence amongst the public about the prospects for future improvement. Although a plurality still sees the UK union as *preferable* to Irish unification, more people expect there to be a united Ireland in twenty years' time than believe the United Kingdom will still be in existence by then.

Most people in Northern Ireland think that a united Ireland will exist in twenty years' time than do the United Kingdom

At any time in the next 20 years, is it likely there will be a united Ireland?/ Do you think the United Kingdom will exist in 20 years' time?

UK IN A CHANGING EUROPE



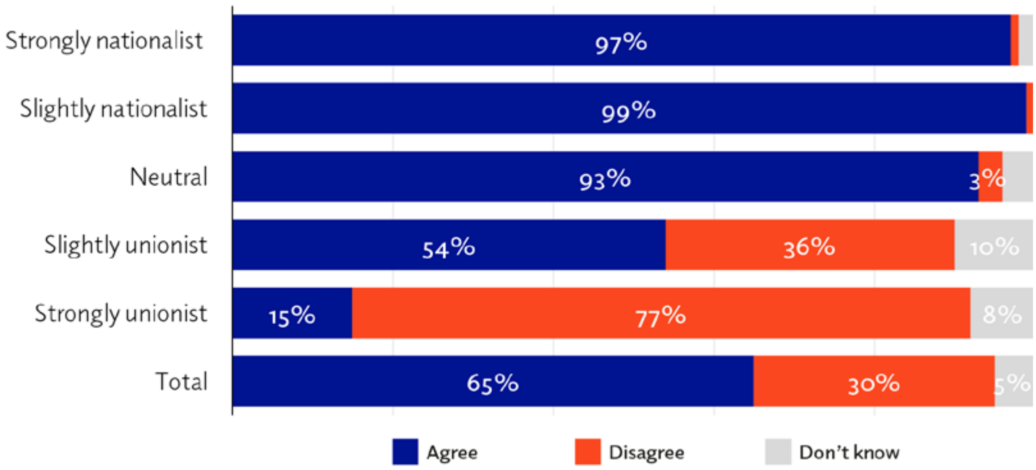
Source: NI Life & Times Survey, 2022

These conditions provoke different reactions. Nationalists will become increasingly impatient for concrete movement towards the 'plan B' of Irish unification. But they shouldn't lose sight of the fact that Sinn Féin's surge of support in 2023 came from those who want to see the Northern Ireland Assembly function, and not just those who want to see a United Ireland.

For their part, unionists will become increasingly keen to hitch onto whatever might seem the heaviest bulwark against a slide into a 'border poll'. For hardline unionists, going into an Executive as deputy First Minister and into an Assembly as second largest party is a challenge in and of itself; to do so in the context of unique and complex post-Brexit arrangements feels like compounding the risk to the Union. This is why, even after the Windsor Framework adjustments, most continued to unequivocally support the DUP's boycott of power-sharing.

'Now we have the Windsor Framework, the NI Assembly and the Executive should be restored and fully functioning'. Do you agree with this statement?

UK IN A CHANGING EUROPE



Source: Post Brexit Governance NI, Testing the Temperature VIII, June 2023

Unionist MLAs still make up the largest grouping in the Assembly and the Union is the preferred constitutional status for the plurality in Northern Ireland for now. But the evidence since 2019 shows that, even if the DUP don't move, public opinion will.

POLICY AREAS

IMMIGRATION

Professor Maria Sobolewska

The Conservative Party have done their utmost to raise the salience of immigration from its post Brexit and Covid-19 low. They have partially succeeded. While relatively few people spontaneously name it among the most important issue facing Britain, when presented with a list of possible issues to choose from, more than a third of respondents pick it. In these latter polls, immigration and asylum have, for the last year, been cruising in third spot on the hotly contested 'most important issue facing Britain' index, right after the economy and health.

Yet, this might prove a Pyrrhic victory for a party that has, in recent history, suffered more than it has benefitted from the high salience of immigration, and that currently enjoys only a poor reputation for its handling of the issue.

In designing their immigration policy, Labour has gambled on the word that proved so successful during the 2016 EU Referendum campaign: control. But will their plan to work with the European Union to regulate the asylum system merely remind voters of not just of one, but two areas of potential weakness?

With neither of the major parties having had little success, for over a decade, in persuading voters that they are the best people to handle immigration, perhaps they should simply talk about something else? Yet while Labour might see it this way and is attempting to manage the issue in a quietly efficient manner, the Conservatives are taking a major risk by putting immigration front and centre in the run up to an election that is likely to be dominated by the economy.

The sight of 'small boats' crossing the English Channel throughout 2023 has presented the Conservatives with the opportunity to frame the issue of immigration as one of illegal entry and 'jumping the queue'. The more sympathetic coverage highlights that, for many refugees, all other routes remain closed. As part of its attempt to 'stop the boats', the Government introduced the Illegal Migration Act 2023 which came into law in July and has outlawed this method of last resort, defining as illegal any attempt to apply for asylum via this route.

The Act, and the highly polarised debates in both Houses of Parliament which followed its introduction, impinged on the consciousness of voters via the unlikely medium of football. Even those Brits who do not follow the news were made aware of the controversies around the Bill when Match of the Day presenter Gary Lineker was temporarily excluded from BBC football coverage after criticising the Government's proposals on social media.

Yet even in the midst of such a heated controversy, there was barely a spike in the number of respondents that named immigration as the most important issue facing Britain. Only about a third of the public sided with the public broadcaster over Lineker. Although 50% of Conservative voters supported his suspension, the weight of public opinion was mostly behind him. Indeed, just 9% of the public thought the proposals he criticised would work at all.

Polarisation around the issue of Small Boats has been compounded intermittently by the lengthy legal battle over the Government's policy to deport asylum seekers, process their claims and resettle them in Rwanda. The legal dispute over this policy is at the time of writing under scrutiny by the Supreme Court's following earlier judgements in favour and against. Public opinion is similarly split: 40% approve of the policy. Yet a recurrent theme is the public's view that the proposals will not actually work - just a third have confidence the scheme will be implemented.

In September, Labour leader Sir Keir Starmer presented his counterproposals, based on cooperation with the European Union and an intention to process all applications for asylum, including those arriving on 'small boats,' on their merits. Although the public is marginally more positive about Labour's proposals, again, a host of familiar accusations about their effectiveness were raised: from edging back towards the EU to enabling mass uncontrolled migration.

Luckily for Labour, a lack of salience around immigration is helping the party dodge such accusations for the time being. As the Opposition, all they need to do is to keep the critical eye of the public on the Government's failures. Emphasising the Government's lack of control over immigration, whilst not committing too clearly to any policy, seems the most obvious strategy.

For the Conservatives, the lack of public attention paid to immigration is a problem. Immigration and asylum resonate most with a narrow electorate: older, authoritarian, Leave-voting people who already strongly lean to, or identify, as Conservative.

Given that the rest of the country seem at the least disinterested in the issue of immigration, and in some cases much more positive about it than they were before the Referendum, this strategy might alienate a much larger proportion of the electorate than it would win over. This includes a good portion of the party's own base: data shows that while just over half of Conservative voters at the last election were negative on immigration, the other half was either neutral or positive. More widely, all voters rate the Conservative's performance on immigration negatively, thus making it doubtful they will have any faith in new policy initiatives.

With an ambivalent, and largely uninterested public, and despite the Conservative's best efforts, immigration seems unlikely to play a major role in the next election. Recent events have meant that the salience of immigration has increased among a relatively small group of voters who would likely vote Conservative anyway. Rather, the economy and the NHS are likely to dominate. If we learnt anything from the years in the run-up to the 2016 referendum, it is that the salience of immigration only matters when the salience of the economy is low- something which not true this time around.

INEQUALITY

Suzanne Hall and Rachel Hesketh

Headline inflation of 6.7%, food price inflation of close to 20% in March, and five interest rate rises this year. The pressures of the cost of living on UK households in 2023 have been staggering. With poorer households typically hit the hardest by the rising price of essentials, widespread evidence of people going without meals or heating, and increased reliance on food banks, the crisis has amplified inequality.

But while the current pressures are acute, it may be a mistake to see the problem as new or exceptional. We know that many families have been struggling to get by for years. This isn't seen as a new crisis, but the inevitable result of years of cuts, austerity measures and pay packets which do not reflect price rises underinvestment. That said, while inequality in the UK may best be viewed as a deep-rooted problem, the cost-of-living crisis has given it a visibility and urgency previously lacking.

The Ipsos Issues Index shows that poverty/inequality is seen by the public to be among the biggest issues currently facing the country. In every month of 2023 so far, inequality has been among the top ten most mentioned issues, with 12% of respondents in the September edition spontaneously selecting it as either the most important or another important issue facing Britain today.

The public not only believes inequality to be high but sees it as *too* high. Polling conducted in early 2023 found that over 70% believe that the gap between those with little wealth and lots of wealth is too large, and that over 60% believe this gap should be reduced (concern about inequality has on occasion not been matched by a desire to do something about it).

Public concern about inequality may stem in part from perceptions that it is driving an important power imbalance, with the very wealthy gaining power and influence at the expense of democratic institutions. In the same survey, the very rich were judged to be the most powerful group globally, ahead even of national governments. This represents a marked turnaround in 2018, national governments were seen to have more clout than the super-rich.

Longitudinal survey data indicates that public concern about inequality was already building before the cost-of-living crisis hit. The most recent data from the British Social Attitudes survey (BSA) from 2021 shows that the experience of the pandemic heightened public perceptions of Britain as an unequal society. We therefore entered the current crisis with inequality already on people's minds.

Data reveals relatively strong support for redistribution preceding the pandemic and being maintained through it. While Labour voters are more likely than Conservative voters to back higher taxation and spending (61% of Labour voters are in favour of increasing taxes to spend more on health, education and benefits), close to half of Conservative voters (46%) also backed this in 2021, suggesting action to tackle inequality is not necessarily a political dividing line.

Survey data collected in August 2023 reinforces this picture of robust public support for taxation and spending to address the cost-of-living crisis. When asked which of two statements come closest to their views, almost twice as many chose the statement 'the UK government should spend what it takes to address the rising cost of living, if it guarantees an acceptable standard of living for those who are now struggling to get by' as chose 'the UK government needs to limit what it spends on UK addressing the rising cost of living, as it has to balance this with other economic pressures'.

Yet the public may lack confidence in the ability or motivation of politicians to tackle the crisis. Over half of people (55%) strongly agree that 'the UK government is out of touch with how the rising cost of living is impacting the lives of everyday people', and a third strongly agree that 'the UK government is no longer invested in the people living in the UK'. These stark figures point to powerful feelings of detachment from politics, and a belief that the government may not be acting in the best interests of the electorate.

The larger-scale World Values Survey reinforces this picture of collapsing confidence in political institutions. In 2022, fewer than a quarter (23%) of respondents in Britain said they had either a great deal or quite a lot of confidence in parliament, very low in comparative terms. Half the number who expressed confidence in Parliament in 1990. Further, just 1% of Britons expressed a great deal or quite a lot of confidence in political parties, though this figure has been more stable over time. In discussions on levelling-up, focus group participants referred to the Conservative government as "vipers, the lot of them'" while in recent work on the cost-of-living crisis one participant explained how 'this does not seem like a government that wants to solve problems'.

There is no quick fix to be had from falling energy prices and abating food price inflation, though there is clearly appetite among voters to get to grips with the issue. And while the lack of faith that people have in politics means that people will need more than a rhetorical commitment to do something to trust that things will improve, the early signs look positive for Labour. In particular, a Starmer-led Labour government is seen as more likely to improve public services (45% to 18%), offer Britain a fresh start (41% to 17%), act with integrity (45% to 25%), reduce regional inequalities - otherwise known as 'levelling-up' (38% to

18%), do what's best for Britain as a whole (42% to 25%) and reduce the cost of living (36% to 19%). Given that concern about inequality and the impacts of the cost-of-living crisis cuts right across the political spectrum, it could prove to be the deciding factor at the ballot box.

WELFARE AND HOUSING

Dr Tom O'Grady

Since the 2019 election three major developments could have reshaped opinion on housing and welfare: the Covid-19 pandemic, rising housing costs, and the cost-of-living crisis. The pandemic led to greater insecurity and reliance on benefits, with an expanded role for the state in protecting incomes through the furlough programme. Rising demand for more space to work from home in the wake of coronavirus, combined with the chronic undersupply of housing, put upward pressure on house prices and rents. Higher energy prices, and the cost-of-living crisis that resulted, exacerbated these trends and caused interest rates to rise to levels not seen since the mid-2000s. Housing has become even less affordable; household finances are under more strain than ever. These trends have put the benefits system under greater scrutiny following more than a decade of reforms that eroded its generosity.

The public has noticed rising levels of poverty. Many people also report that they are struggling with housing costs, whether mortgages or rent. This all sounds like it ought to drive greater public support for a more generous benefits system and for measures to tackle the housing crisis. Perhaps surprisingly, though, there has been little change in public attitudes since the 2019 election.

The charts below use data from YouGov to track public views on benefits and housebuilding. In both cases, there have been some fluctuations, but the main story is one of stasis. The share of people who think that unemployed people are getting too little support has remained virtually unchanged since the 2019 General Election, at 29%. Likewise, support for and opposition to the building of new housing has stayed pretty constant, although it will be worth monitoring whether a slight upward trend evident since the spring of 2023 is sustained.

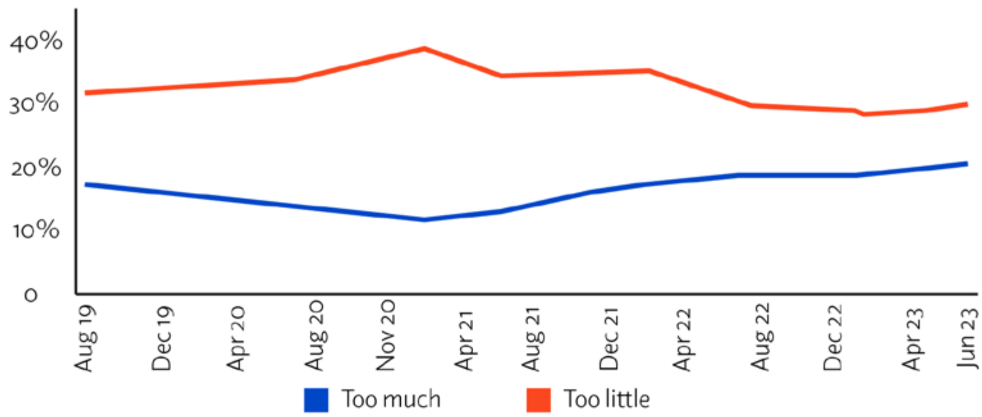
Even if little has changed since the 2019 election, the British public are generally sympathetic to the idea of a more generous benefits system. As revealed by recent analysis of the British Social Attitudes Survey (BSAS), negative views of welfare claimants, and concerns about benefits fraud, now stand at their lowest level since the early 1990s. This follows a period from the mid-1990s to the early 2010s when the public were quite hostile to the welfare system and its users. Today a clear majority of the public thinks that benefits recipients are deserving of help. Support for raising taxes to increase benefits levels has also risen a lot since the early 2010s, although about equal numbers currently support and oppose this policy.

The high levels of support that were already evident in 2019 offer one clue as to why there has been little movement since. The BSAS demonstrates that the large-scale shift to the left on benefits mostly happened over the 2012-19 period. When the pandemic and the cost-of-living crisis hit, many people had changed their minds already. Further change has been muted. A short-lived rise in sympathy for benefits users was evident during the pandemic, but this dissipated quickly as COVID receded. Recent research suggests that this is because the public viewed the pandemic - and the type of people who moved onto benefits during it - as exceptional. The pandemic therefore did not provide a strong reason for a lasting shift in views. Likewise, support for housebuilding was already very high in 2019, with almost three-fifths of British people in favour of an expansion, and this came after a rapid and sustained rise in support over the 2010-19 period. On both issues, the public had moved to the left before the 2019 General Election and remains broadly in the same place today.

The British public are sympathetic to the idea of a more generous benefits system

UK IN A CHANGING EUROPE

Percent stating that the benefit system offers 'too much' or 'too little' support for people who are currently out of work

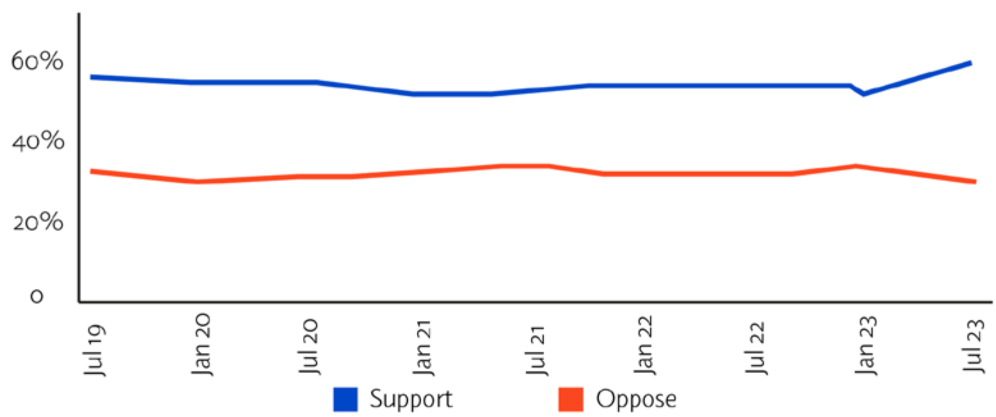


Source: YouGov, August 2019-June 2023

Support for and opposition to housebuilding has stayed relatively consistent since the last general election

UK IN A CHANGING EUROPE

Percent supporting and opposing a large increase in the amount of housing being built in Britain, even if it meant a substantial decrease in house prices

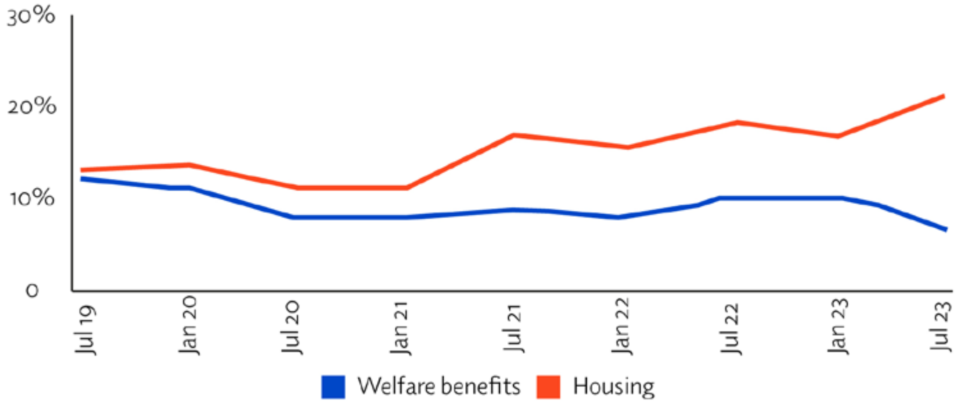


Source: YouGov, August 2019-June 2023

This is not to say that nothing has changed since 2019. Housing has become more salient as an issue to the public, whereas the benefits system has fallen down the agenda. One clue to this comes from very low public satisfaction with the government's performance on housing – fewer than 15% of voters are satisfied, a substantial fall from 2019. Voters support a range of policies that have been off the political agenda until recently, with majority support for measures such as government assistance to pay mortgages and rent, rent caps, no-fault eviction bans and building more social housing.

Housing has become a more salient issue for voters since the last election, whereas the importance of welfare has declined

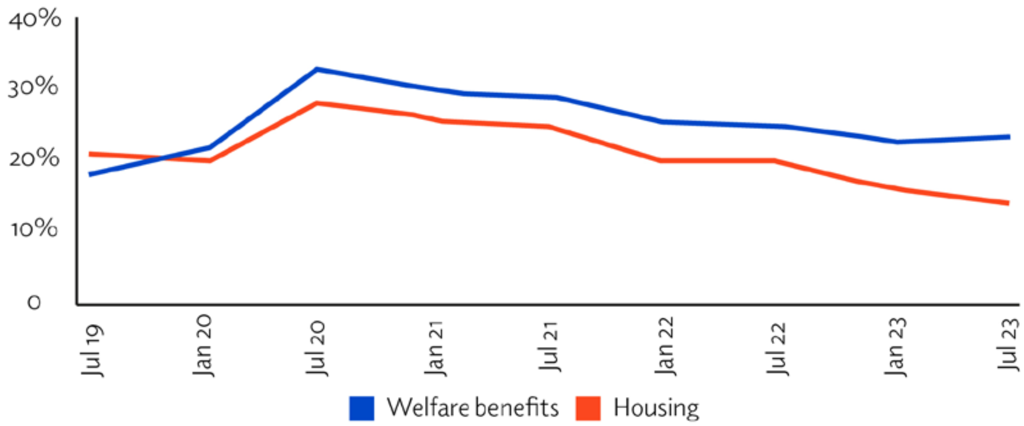
Percent naming 'welfare benefits' or 'housing' as one of the three most important issues facing the country



Source: YouGov, August 2019-June 2023

Less than a quarter of voters think the government is doing well on the issues of welfare and housing

Percent of people saying that the government is currently handling the issue of 'welfare benefits' and 'housing' well



Source: YouGov, August 2019-June 2023

Overall, the public are unhappy with the status quo on housing and would probably support radical changes. But not all parties face equal incentives to adopt them. Core supporters of the Conservative party – typically older homeowners – are much more opposed to housebuilding than others, and these voters also often live in the rural, suburban and southern seats targeted by the Liberal Democrats. On the other hand, there is very high appetite for change amongst Labour supporters. With Keir Starmer recently declaring himself a 'Yimby' who is determined to override barriers to building more homes, housing is likely to be one of the key policy battlegrounds at the next election.

Despite high levels of sympathy for welfare claimants, the benefits system is less of a priority for voters and seemingly for the parties, too. There have been recent hints at more cuts to welfare from the Conservative Party, whereas Labour seems determined to talk about it as little as possible. Neither more cuts nor a revival of the sort harsh rhetoric about scroungers that was popular in the early 2010s are in tune with the public mood. But still, individual punitive measures such as the two-child limit remain popular, and it is less clear that greater spending on benefits would be a vote-winner, particularly given the many other demands facing government. Labour's silence will probably continue, but any future Labour-led government might find political space for quiet improvements to the system once the heat of the election campaign is over.

THE ECONOMY

Professor John Curtice

The author is grateful to Keiran Pedley for his help in compiling Ipsos' data on economic optimism.

This government has faced a number of economic shocks. Confronted with the worse public health crisis for a hundred years, it was obliged, in March 2020, to put the country into lockdown. Then, as the pandemic receded, it took a while for supply chains to be restored, while the Russian invasion of Ukraine exacerbated the already rising price of oil and, especially, gas. The government found itself paying the wages of those who could not work during the pandemic, and then subsidising domestic energy bills during the winter of 2022-3.

Inevitably, the economy suffered. The country's gross domestic product, which fell in the second quarter of 2020 to just 78% of its level in the last quarter of 2019, was only 2% above that level by the third quarter of 2023 . Nominal wages fell during the summer of 2020, and while for some time thereafter wage growth outpaced price inflation, from late 2021 onwards the opposite happened.

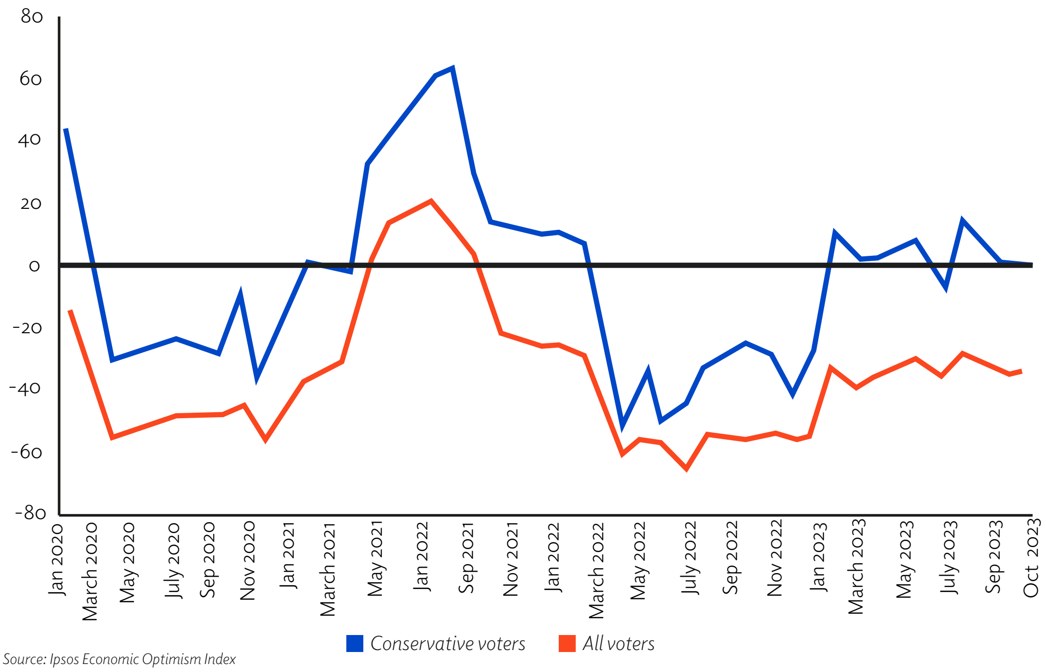
Only in the summer of 2023 did increasing wage growth, fuelled by a tight labour market, begin to catch up with a falling, but still high, level of inflation. Although by July 2023 average wages were 20% higher than they had been in December 2019, so too were prices. Meanwhile, those with a mortgage have increasingly had to cope with a Bank of England interest rate that has risen from 0.1% during the pandemic to 5.25% now.

The public have noticed this economic doom and gloom. Since 1978, Ipsos have asked, 'Do you think the general economic situation of the country will improve, stay the same, or get worse over the next twelve months'. The figure below shows, for both voters as a whole and 2019 Conservative voters in particular, the net level of optimism by this measure since the last election.

Apart from a brief spell in 2021, when the economy benefitted from an easing of lockdown restrictions, the public have persistently been pessimistic about the state of the economy. Indeed, the level to which the index fell during 2022 as the 'cost of living crisis' started to bite (an average of -57 between March and December) replicated the level of pessimism during the financial crisis (-59 between March and September 2008), while the mood during the first lockdown in 2020 (an average of -50 between March and October 2020) was almost as dark. No previous parliament has witnessed such a persistently high level of economic pessimism.

Economic optimism index, January 2020 to September 2023

Do you think the general economic situation of the country will improve, stay the same, or get worse over the next twelve months? (Net optimism)

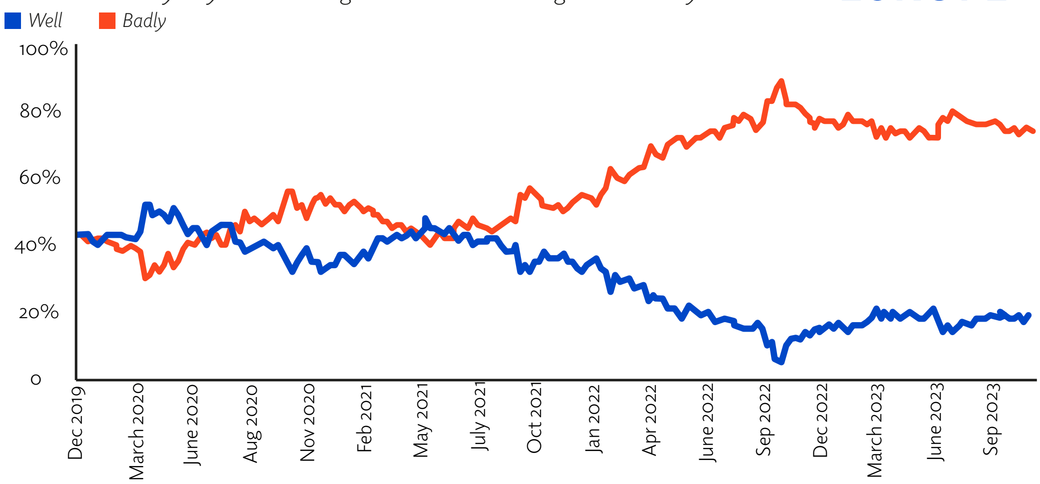


Source: Ipsos Economic Optimism Index

True, those who voted Conservative in 2019 have always been less pessimistic than the general public. That said, for a while during 2022 even they were deeply pessimistic, while in 2023 optimists have only been slightly more numerous than pessimists. The level of economic pessimism among those who voted Conservative in 2019 is still high enough potentially to be costing the government plenty of support.

Perceptions of Government's Economic Competence, Dec 2019-October 2023

How well or badly do you think the government is handling the economy?



Source: YouGov., December 2019-October 2023

But how have voters rated the government's handling of the economy? Early in the lockdown, more felt the government was handling the economy well than badly, and while the balance soon tilted somewhat in the opposite direction, the economic recovery in 2021 saw the government's critics being balanced out by admirers.

However, as inflation began to bite towards the end of 2021, so the government's economic reputation began to suffer. By April 2022 over two in three voters said the government was handling the economy badly. Even among those who voted Conservative in 2019, critics were now outnumbering admirers. While the government was able to avoid the blame for the immediate impact of the pandemic, it was unable to fend off responsibility for the subsequent cost of living crisis.

Its economic reputation took a further knock in the wake of Liz Truss' 'fiscal event', which resulted in turmoil on the financial markets. In October and November 2022, over 80% were saying the government was handling the economy badly, a judgement that- momentarily, at least - was shared by Conservative supporters. Subsequently, evaluations have only been marginally better, while, as Jane Green notes in her chapter, voters are now more likely to feel that Labour, and not the Conservatives, are better able to handle the economy.

Using data from the British Election Study, we can directly examine the extent to which perceptions of the state of the economy have been associated with a decline in Conservative support. The following table shows, for each wave of the study's fieldwork during this parliament the proportion of 2019 Conservative voters who say they would vote for the Conservatives again, broken down by whether they thought the economy had got better or worse over the last twelve months. It also shows the proportion who said that the economy had got a lot worse.

Three key points emerge. First, during the pandemic, Conservative voters' perceptions of the state of the economy were largely unrelated to their reported chances of voting Conservative again. Those who said the economy had got a lot worse were only slightly less likely to say they would back the Conservatives again.

The public has become more pessimistic about the impact of Brexit on the UK economy

UK IN A CHANGING EUROPE

Table 1: Support for Conservatives 2020-2023 by Retrospective Economic Evaluations, 2019 Conservative Voters.

% would vote Conservative again among those who said the economy had....

	Stayed same/Got Better	Got a Little Worse	Got a Lot Worse	% who said economy had got a lot worse
June 2020	78	78	72	48
May 2021	85	81	71	30
Nov/Dec 2021	68	60	38	20
May 2022	68	68	45	49
Dec 2022	61	55	35	61
May 2023	62	52	32	44

NB: Those who said they did not know how they would vote are included in the denominator on which these percentages are calculated.

Source: British Election Study Internet Panel.

Second, the willingness of Conservative voters to vote the same way as they did in 2019 has declined irrespective of their perceptions of the state of the economy. Even among those who think the economy has not deteriorated over the last twelve months, only just over three in five now say they would vote Conservative again - well below the equivalent figure of 85% in May 2021. Pessimism about the economy is not the only reason for the sharp decline in the Conservatives' fortunes.

That said and third, the perception that the economy is doing badly has recently been weighing particularly heavily on the Conservatives' fortunes. Although fewer Conservative voters are gloomy about the state of the economy than at the end of 2022, those who are pessimistic prove to be as much as 30 points less likely to say they would vote Conservative again - a gap only previously matched at the end of 2021 when gloom was much less widespread than it is now.

Although it may not be sufficient, turning around the economy would certainly seem to be essential if the Conservatives are to have any prospect of winning the next election.

THE ENVIRONMENT AND NET ZERO

Professor Stephen Fisher

Since the last election, there have been successive waves of environmental concern. The proportion of people mentioning the environment unprompted as one of the most important issues facing Britain in the Ipsos Issues Index rose to 25% in February 2020 (second only to the NHS) and then dropped dramatically to 9% in March 2020 as the Covid pandemic became the overwhelming priority. Environmental concerns rose again to an all-time high of 40%, to become the most mentioned issue in November 2021 when the COP 26 UN climate conference was held in Glasgow. Yet that peak also quickly faded.

Subsequent waves of concern in the summers of both 2022 and 2023 were smaller. However, since 2021 the reported level of public concern has been consistently greater than in any month from 2008 to the end of 2017, with just one exception. The environment is now frequently one of the top five issues (and top three non-economic issues) in the public mind.

Public concern around the environment has been higher since 2021 than it was at almost any time between 2008-17

What would you say is the most important issue facing Britain today?/What do you see as other important issues facing Britain today? (Those answering pollution/the environment)

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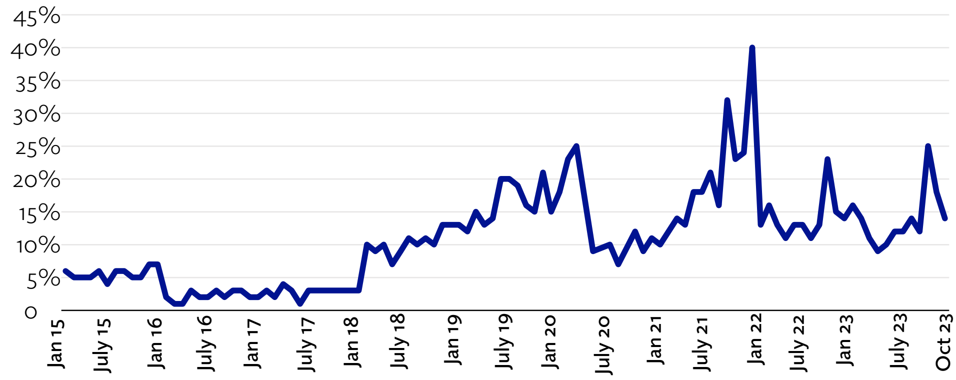


Source: Ipos issues index, 2015-2023

Party support since 2019 has not been much affected by all this. Yet the Conservatives' collapse in the polls since the onset of the cost-of-living crisis and 'partygate' revelations in late 2021 has led two Prime Ministers to pursue a less enthusiastic approach to net zero than Boris Johnson did after the last election.

As a candidate in 2022, Rishi Sunak warned against going 'too hard and too fast' on net zero, and pledged not to build more onshore wind farms.

A surprise win for the Conservatives in the Uxbridge and South Ruislip by election in July 2023 was widely ascribed to local hostility to the expansion of London's Ultra-Low Emissions Zone (ULEZ). A week later, the government announced plans to grant more than a hundred new oil and gas licences and, by watering down reforms to the carbon market, made it cheaper to pollute in the UK than in the EU. Furthermore, in September Sunak announced a delay on the ban of new petrol and diesel cars (from 2030 to 2035), the abolition of energy efficiency requirements for rental properties, a relaxation of the phaseout target for the installation of new gas boilers, and a delay to the ban on new oil boilers (from 2026 to 2035).

None of these announcements yielded a rise in the Tory poll rating. The September package got a mixed reaction from the public. We Think found 23% of voters did not know whether Sunak made the right or wrong decision 'to drop some of his previous commitments on tackling climate change', and the rest were evenly divided, primarily along pre-existing partisan lines.

In the same poll, 58% said the climate crisis was important to them, yet 53% also expressed concern about the 'personal financial cost of Net Zero'. So, the basis for a classic cost versus climate benefit dilemma is there. However, among those aware of Sunak's announcement, slightly more thought it would increase rather than reduce the cost of living (27% to 22%) with most (39%) saying it would make no difference. With voters unconvinced of a cost saving, it is hardly surprising that Sunak's announcement did not revive Tory fortunes.

Sunak's announcements raised questions for Labour about whether it would stick with the new plans or revert to stronger climate change mitigation policies. Labour decided it would reinstate the 2030 ban on the sale of new petrol and diesel cars, but would not reverse the changes to the phase out of fossil fuel boilers nor revoke oil and gas field drilling licences. The latter, at least, is popular with the public - Deltapoll found 55% think Labour would be right not to take away the licences if elected.

But despite all these developments, public support for the law mandating net zero emissions by 2050 has remained steady. So, broadly, has the party divide on climate attitudes. Perhaps one important change, though, may have been an increase in climate scepticism amongst 2019 Conservative voters; as many as 41% now say that concerns around climate change 'have been exaggerated - the threat is not as real as many scientists have said'. That figure, from October 2023, is up 6 points from August and a record high. By contrast, just 9% of Labour voters say climate concerns have been exaggerated, and 82% said they have not been; levels that have been broadly stable since 2019. It may be that Conservatives have recently become more climate sceptic as a result of Rishi

Sunak's announcements, and perhaps also media discussion of them, but at the time of writing that view is based on just one poll.

Boris Johnson made the development and location of green energy infrastructure core to 'levelling up' and to his strategy for retaining 2019 northern voters. Keir Starmer has added a nationalist element, contrasting 'clean British energy' with 'foreign fossil fuels'. Labour's plan to base a publicly owned 'Great British Energy' company in Scotland means their climate policy is now an important part of their strategy to strengthen the union of the UK and win back seats north of the border.

To maximise electoral gains, Labour has to perform a balancing act. Polls show more voters are up for grabs from parties to the net zero-sceptic right, rather than from other parties on the climate conscious left. However, the Conservative vote has already been heavily squeezed in recent years. The Liberal Democrat and Green poll shares have held steady. Success in appealing to supporters of those parties, including for tactical votes, might depend on convincing them that environmental policy is safe in Labour's hands.

DEFENCE AND SECURITY

Sophia Gaston

One of the key developments in British foreign policy over the past decade has been the integration of our domestic and international interests. Almost every geopolitical issue in the Prime Minister's in-tray must now be addressed with an eye to 'retail politics' at home. Think, for instance, of the impacts of Russia's invasion of Ukraine on food and energy process, or the risk of China responding to the imposition of more robust security measures with tariffs that harm British producers. Equally, domestic political choices must now be considered through the prism of their impact on our international alliances and reputation, with our global leadership on net zero contingent on the ambition of Whitehall policies.

This integration reflects the natural consequences of the forces of globalisation, which have entangled our economies in complex supply chains, and enhanced both our value to, and dependency on, other countries around the world.

This enhanced integration of the international and the domestic not only functions from the outside-in but also from the inside-out. Citizens expect the government to be responsive to their foreign policy priorities, and the government has in turn come to understand that securing public consent at home is an essential foundation of an ambitious international agenda.

Yet at the same time, the relatively scant exposure the average citizen has to discussions of foreign policy and international relations means their attitudes are considerably more instinctive than their views on domestic policy, which are shaped by greater personal experience of policies and their effects.

In a cost-of-living crisis, the most prominent divisions on foreign policy are often now between higher and lower-income citizens. In a series of UK-wide focus groups conducted in the spring, less prosperous Britons, and particularly women in low-income households, were the most inclined to view domestic and international spending through a zero-sum frame, believing one came at the expense of the other.

As of the start of 2023, 71% of Brits believed the UK's response to the Russian invasion of Ukraine had been positive. Since the first anniversary of the war, however, questions have been raised in focus groups as to whether our current commitments to Ukraine will be sustainable over the course of a protracted conflict, in the midst of a cost-of-living crisis. These concerns are often raised with a sense of guilt and embarrassment, as Britons have been some of the most enthusiastic supporters of the defence of Ukraine - despite the recent British reticence towards involvement in military conflicts.

More widely, the heightened interest in an expeditious end to the conflict is fuelling the appeal of conspiracy narratives, with the increase in information sources of the digital age.

Another significant trend in public opinion on foreign policy has been the increasing primacy of geography – a by-product of Brexit, the pandemic, and the war in Ukraine. More Britons now see that we are a European nation, and that our relations within our neighbourhood are vital to our prosperity, security, and quality of life. This perspective shift is a principal driver of the desire to repair and deepen our partnership with the European Union. Britons understand that many of the issues on which the Government is staking its reputation, such as the small boats crisis and energy security, will be achieved only through improved relations in our neighbourhood.

The British people are also increasingly aware of the practical consequences of Brexit, with labour shortages, travel disruption and trade barriers frequently cited in focus groups by both Remain and Leave voters. The two camps continue to be divided on whether sovereignty or cooperation is the best means of building national resilience, or whether Brexit may prove itself a success in the longer-term, but they can agree on what currently isn't working.

One of the most dynamic areas of British public opinion is towards China, with views hardening at astonishing speed as politicians became increasingly concerned about the security risks posed by Chinese involvement in our nuclear and communications networks. The rising alarm about the UK's security vulnerabilities has seemingly galvanised support for new initiatives such as the AUKUS pact, which 65% believe could help to make the UK more competitive.

Nonetheless, Britons remain sceptical about the efficacy of our current security apparatus, with just 36% of citizens confident the Government can shield them from the threats China poses.

Moreover, with the cost-of-living crisis biting, even growing security concerns have not been sufficient to translate into an appetite for economic decoupling from China. A prominent shift in my focus groups over the past year is that Britons now shy away from the prospect of economic disruption pursued in the name of our values or geopolitical interest. As such, the complexity of the relationship the UK government must pursue with China is matched by the complicated instincts of the British people – they are neither 'hawks' nor 'doves'.

Political parties remain sceptical of the electoral significance of international affairs, but this misses something about the role these issues play in the 'mood music' of an election. The level of insecurity that Britons are experiencing, and the risks they are willing to bear, are vital to the decisions they take about parties and candidates, as are their perceptions of parties' capacity to keep them safe and defend their interests in a rapidly evolving landscape.

In the next General Election, voters will not be casting their vote on the basis of the distinct foreign policy positions of the parties, not least because of the bipartisan consensus on many of the key issues. But they will be taking decisions about which party they feel is best able to keep them safe, respond to unexpected developments, and represent the kind of nation they wish to be seen as on the world stage.

TRADE

Professor Sofia Vasilopoulou, Dr Daniel Keith and Dr Liisa Talving

The project was funded by the Morrell Trust.

International trade has not been a particularly salient issue in the UK. However, post-Brexit, the UK has had to develop a national trade policy and elements of this could become politicised. The Conservative government portrayed Brexit as an opportunity for the UK to redefine its role in the world. The idea of 'Global Britain' - with trade at its core - became the foundation of the country's foreign policy. In July 2016, the government established a new Department for International Trade, tasked with securing 'UK and global prosperity by promoting and financing international trade and investment, and championing free trade'.

Since then, the UK has successfully negotiated the Trade and Cooperation Agreement (TCA) with the EU, which entered into force on 1 May 2021. It has also signed trade agreements with Australia (2021) and New Zealand (2022), and a treaty to join the Comprehensive and Progressive Agreement for trans-Pacific Partnership (CPTPP) trade group, which includes countries such as Australia, Canada, Japan, Mexico and New Zealand.

Yet, the prize of a bilateral trade deal with one of the world's largest economies (the U.S., China or India) has proved elusive. Negotiations with the US officially started in May 2020, but the Biden administration played down the chances of an agreement. Trade talks with India were supposed to be concluded by October 2022, but remain ongoing.

Although public opinion does not seem to have played a central part in the government's trade policy, the potential for trade to be politicised has been demonstrated in recent years. During the Brexit referendum, debates emerged around the feasibility and desirability of new trade agreements. Then-Labour Party leader Jeremy Corbyn expressed concern that a UK-US trade deal would have negative consequences for the NHS. Since 2022, Rishi Sunak has emphasised substance rather than speed in signing trade deals, following his criticism of the 'one-sided' nature of the deal with Australia.

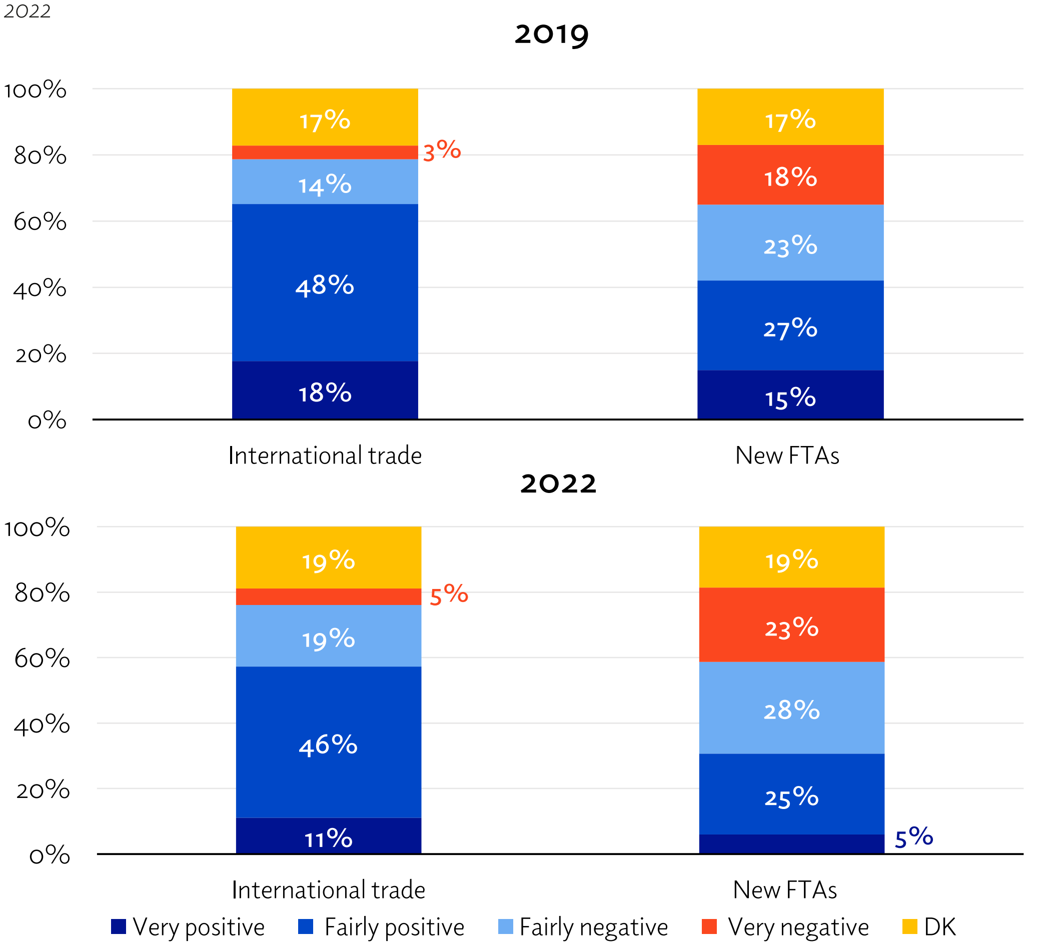
Our research draws on public opinion surveys fielded by YouGov in 2019 and 2022. Respondents were asked about their attitudes to trade in general, and, more specifically, towards new free trade agreements (FTAs). The chart below indicates the large range of opinions that exist concerning these issues, as well as the significant opposition to FTAs.

The majority of respondents had a very or fairly positive impression of international trade (66% in 2019 and 57% in 2022), but fewer respondents felt the same about new FTAs (42% in 2019 and 32% in 2022). In other words, attitudes towards new FTAs are much more negative than those towards trade more broadly, and these patterns are consistent over time.

The findings also suggest that, while public support for trade in general is higher than that for new FTAs, support for both has declined over time. The proportion of respondents with a positive impression of international trade decreased by 9 points from 2019 to 2022, and positive attitudes towards FTAs dropped by almost 10 points. In the context of post-Brexit economic challenges, the cost-of-living crisis, and the Covid-19 pandemic, the public have become less positive towards trade.

The proportion of respondents with a positive impression of international trade and FTAs has decreased since 2019

Impressions of international trade and new free trade agreements, 2019 and 2022



Source: YouGov, 2019 and 2022

Our findings indicate that, against a general backdrop of pro-trade attitudes, FTAs are more contested. While Conservative Party and Brexit Party voters strongly support new FTAs, this support weakened from 2019 to 2022. Large majorities of Labour and Liberal Democrat voters also hold negative views of FTAs, highlighting the potential for party politicisation of trade agreements. Opposition to FTAs reflects attitudes towards Brexit. It may also reflect negative media coverage of specific issues relating to FTAs such as hormone-treated beef and chlorinated chicken.

There is a clear partisan split in support for FTAs among voters

Impressions of new free trade agreements by party vote: ***2019***

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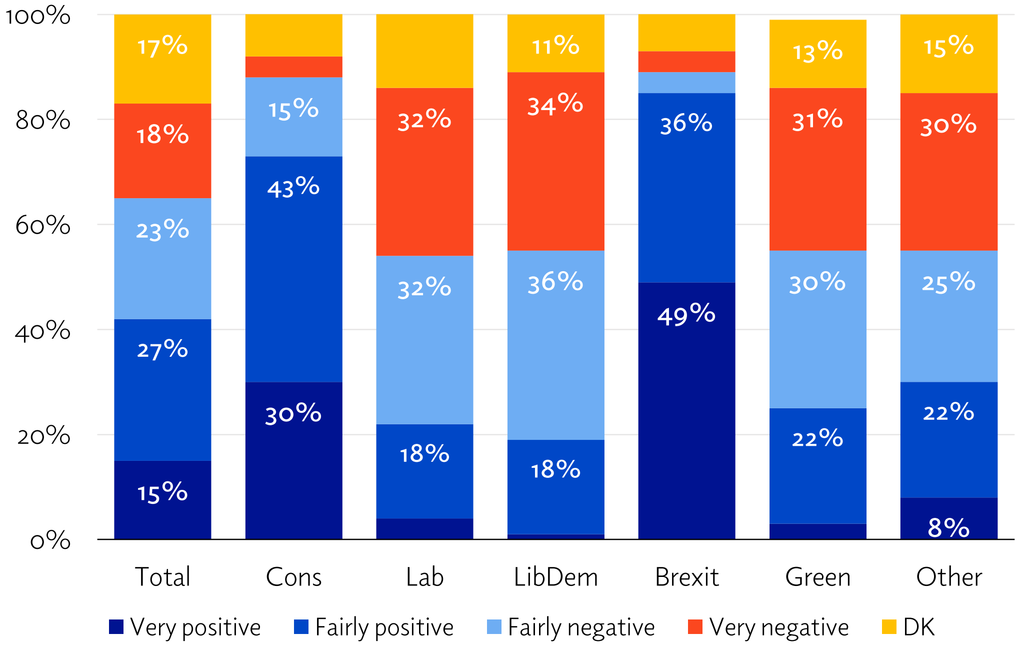

Source: YouGov, 2019

There is a clear partisan split in support for FTAs among voters

Impressions of new free trade agreements by party vote: ***2022***

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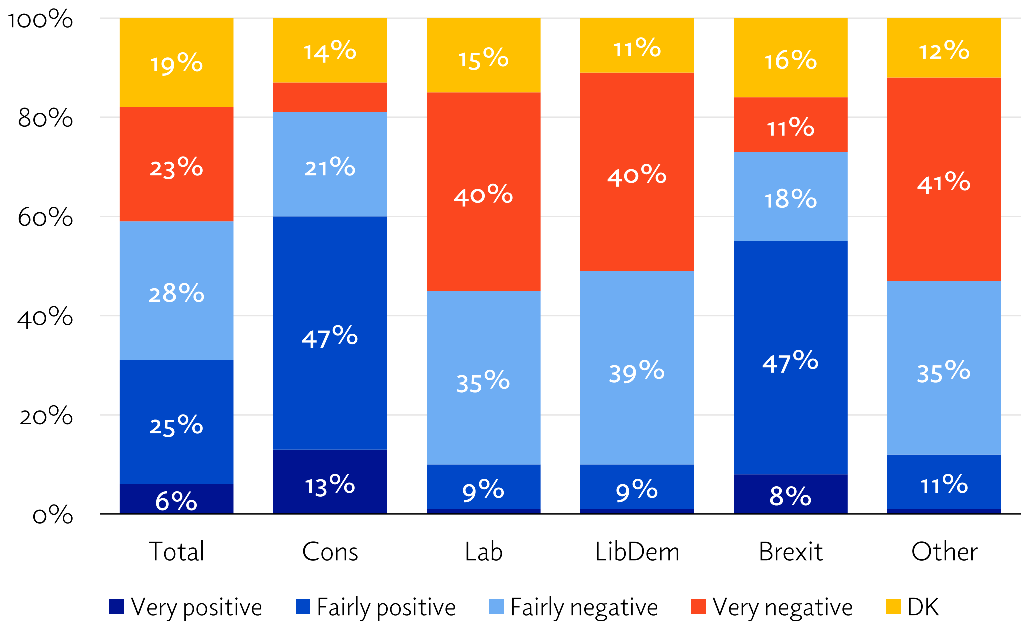

Source: YouGov, 2022

All this being said, there are good reasons to expect that trade will remain an issue of low salience at the next general election. First, the post-Brexit trade deals negotiated thus far have been government-led, and criticised for a lack of parliamentary scrutiny and debate over their strategic objectives, negotiating principles and impacts on the UK nations, regions and sectors. In this context, voters have been provided with limited information on trade deals. This has made it harder for them to form opinions on the advantages or disadvantages of FTAs.

Second, trade policy may appear less contested following the conclusion of the TCA. The prospects for a major US-UK trade deal have declined, with the government accepting that such a deal is unlikely in the near future. Rather, the UK's priorities include progressing negotiations with countries including India, Canada, Mexico, and Israel, which attract far less coverage.

However, we also find evidence of deepening public divisions on FTAs, with a majority holding negative views of such deals. Under what circumstances might trade policy become more salient for voters? One possible scenario is if a British government seeks to renegotiate or amend the TCA. Attempts to progress negotiations on a landmark trade deal with a large economy such as India will also be an important test. Negotiations have encountered difficulties due to disagreements over tariffs, intellectual property rights, product standards and visa rules.

Decisions taken in such areas may be unpopular with different sections of the electorate and may have potential to attract opposition from Brexiters and particularly within sections of the Conservative Party. The irony may be that the citizens most supportive of trade deals may be among those most suspicious of the concessions made to forge them.

Data shows that the public is divided on free trade agreements, but a large proportion of survey respondents replied that they did not know about the advantages or disadvantages that could be gleaned from them. If trade does come to play a more central role at elections, then much will depend on the government's ability to provide the public with information on what it is aiming for when it signs partnerships with other countries and what the possible returns might be.

PUBLIC SERVICES

Anthony Wells

Public services – most importantly among them, health, and education – loomed large in the early part of the 2019 parliament due to Covid-19. While the focus of political debate may have moved more towards the cost of living and immigration in the latter part of the parliament, public services have remained high on the public's agenda, not least because of the long-lasting impact of the pandemic on the NHS and the impact of pay-related strike action on both the NHS and schools.

As we approach the end of this parliament, the government finds itself in an unhappy position of governing a country where 'nothing works'. Asked about a variety of public services, in almost all cases a majority of people think they are in a bad state (with the notable exceptions of the fire service, armed services and buses.)

The public thinks most public services in the UK are in a bad state, particularly the NHS and social care

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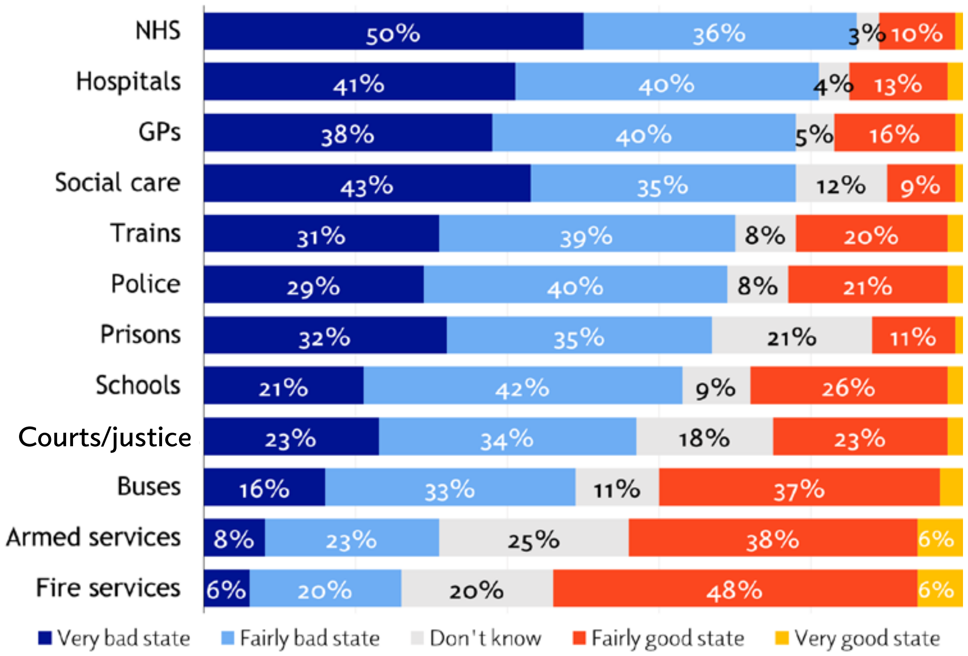
Do you think that each of the following public services in the UK are in a good state or a bad state?



Source: YouGov, 20-29 September 2023

The pandemic had a particular impact upon attitudes towards public services. In the case of the NHS, this was because it was at the forefront of the battle against the pandemic. For other public services, it because of the impact of lockdown. Education, for example, was often at the centre of political arguments, with debates around whether, when and how schools should re-open, and then later about how qualifications should be assessed for those who were unable to sit exams or whose education was disrupted by lockdown. For what it is worth, in hindsight the public think by 59% to 29% that the government was right to close schools.

Initially, this focus on public services produced a 'rally round the flag' effect. People were more likely to trust the government overall, and more likely to express positive opinions of those public services struggling to cope with coronavirus, particularly the health service.

At the peak of the pandemic, 70% of respondents were positive about the NHS at national level, and 80% for local NHS services. People were happy not only to go and clap for NHS, but also to tell pollsters how much they valued it. Alongside this, we saw similarly positive, albeit more qualified, views of schools and education.

Since then, however, perceptions of schools have gradually drifted back to a similar place to where they were pre-Covid. Meanwhile, perceptions of NHS services have crashed precipitously. By October 2023, 44% of people thought negatively of their local NHS services, 67% of national NHS services.

Wider polling on satisfaction with and confidence in the NHS underlines this shift in sentiment. The British Social Attitudes survey found a similar sharp drop in support for the NHS between 2020 and 2023, with only 29% of respondents expressing satisfaction with NHS services, the lowest in that series since 1983. More widely, in January 2023, YouGov/Channel 4 found that only 35% of people said that they would be confident they would get the care they needed if they rang 999 in an emergency.

Looking at party evaluations, we find very little confidence in the Conservative government to handle either the NHS or education. As of November 2023, just 27% of voters think the government is handling education well, while 58% say it is handling it badly. Views on the government's handling of health are even more negative, with 81% saying the government is handling the issue badly. Meanwhile, the Labour Party has a substantial lead over the Conservatives on both issues when people are asked which party they would trust more.

However, perceptions of how well or badly the government is handling a particular issue, or which party would be better on said issue, depends heavily on underlying perceptions of competence. It's notable that the biggest increase in Labour's lead over the Conservatives on health and education followed Liz Truss's disastrous mini budget in October 2022. The Conservative Party's terrible ratings on the NHS will partly be a function of waiting lists and difficulty getting appointments but will also be a knock-on effect from a broad lack of trust in the party's ability to run the country.

The collapse in satisfaction with the NHS does not translate into support for fundamental reform of the service. Both the British Social Attitudes survey and Ipsos polling for the NHS Confederation found overwhelming support for the principles of the NHS (universal, free at the point of delivery and tax funded). Only 16% of people would support moving towards an insurance-based health system. A record level of unhappiness with the NHS does not, in any way, mean people want rid of it.

Interestingly, despite the higher levels of satisfaction, there is actually less public support for the current organisation of schools. The Conservative policy of 'free schools' has never won over the public, and YouGov's regular tracker still finds just 25% support. Opposition to academisation has faded a little now that it is a fait accompli in most areas, yet recent data shows just 31% of people supported increasing the number of academy schools- and an almost equal amount are opposed.

Labour has suggested it is not looking to reverse academisation or take on free schools, meaning this kind of reform is unlikely to be a major issue at the next election. But of the most prominent educational policies that have actually been put forward by the two parties, YouGov found that Rishi Sunak's promise to replace A-Levels with a broader qualification has split the public, with 36% supportive and 37% opposed. Meanwhile, Ipsos found Labour's promise to put VAT on private school fees was supported by 57% of voters.

Public services are likely to remain important to the public. Health in particular has consistently been seen as one of the two most important issues facing the country, with it now ranking consistently second behind the economy/cost of living.

Rishi Sunak's five priorities include a promise to reduce NHS waiting lists, though in the eyes of voters, at least, he has made no progress towards achieving this. Given the government's poor record in the eye of the public, public services are likely to be an issue owned by Labour in the run up to the general election.

VOTING BEHAVIOUR

GENERATIONAL DIVIDES

Professor Bobby Duffy

Millennials are the deadliest generation in history, killing everything from marriage to the napkin industry, the Olympics to marmalade.

And now they're accused of destroying another long-standing tradition – the political lifecycle, and with it, the electoral prospects of the Conservative Party.

The generation born from 1980 to 1995 remains stubbornly below average in terms of its level of support for the Conservatives, despite the oldest of that cohort now being in their early 40s – giving the lie to the multi-attributed quip that "if you are not a liberal at 25, you have no heart. If you are not a conservative at 35, you have no brain."

The data show a quite remarkable shift, which reflects a very real challenge for the Conservatives in the run-up to the next general election.

Conservative Party support has developed the strongest generational gradient we've seen since the 1980s, when the British Social Attitudes surveys began. As analysis of long-term trends shows, there was a 40-percentage-point range in support for the party from oldest to youngest in 2020, compared with half that in the early 2000s, and only 10 percentage points in the early 1990s – and this age divide is mirrored in recent polling on voting intention.

This is driven by unusually high levels of support for the Conservatives among older generations, as well as unusually low levels of support for the party among younger generations (including Gen Z and Millennials).

Support for the Conservatives among those born between 1980-1994 is below average

Party identification: Conservative Party

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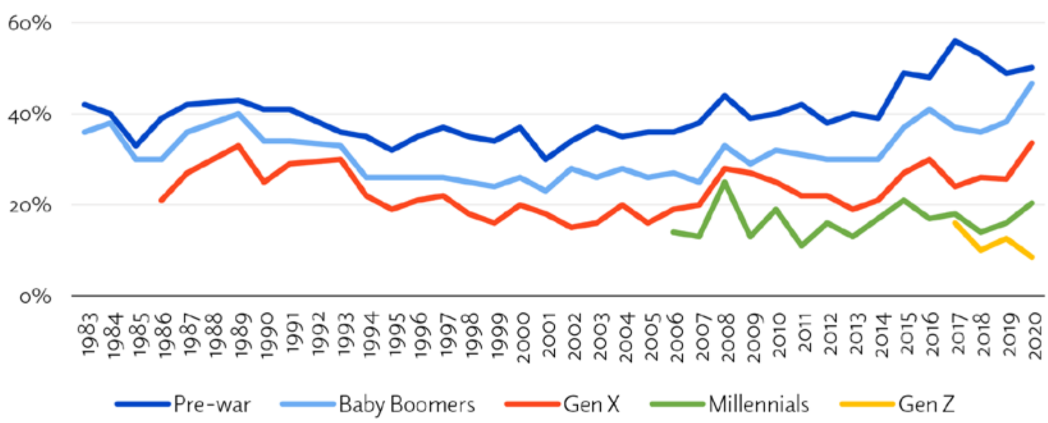

Source: British Social Attitudes Surveys, 1983-2020

In many ways, Labour support has seen an even more extraordinary shift. We have very quickly got used to the idea that Labour's vote is much younger than the Conservatives' - but this is a completely new pattern. In fact, Labour support has traditionally - as far back as the early 1980s - been evenly spread across the generations. But that changed suddenly, in the run-up to, and aftermath of, the Brexit vote. Setting aside the huge dip in Labour support around Corbyn's leadership, we now see an unprecedented 30-point gap in Labour support between youngest and oldest.

There is, then, more to the generational patterns in party support than Millennial exceptionalism.

Since Brexit, Labour's vote has become increasingly young

Party identification: Labour Party

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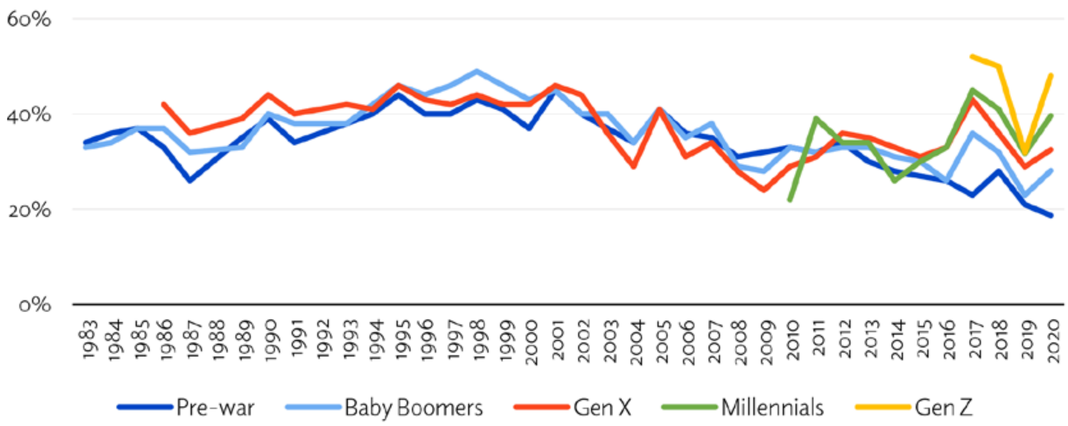


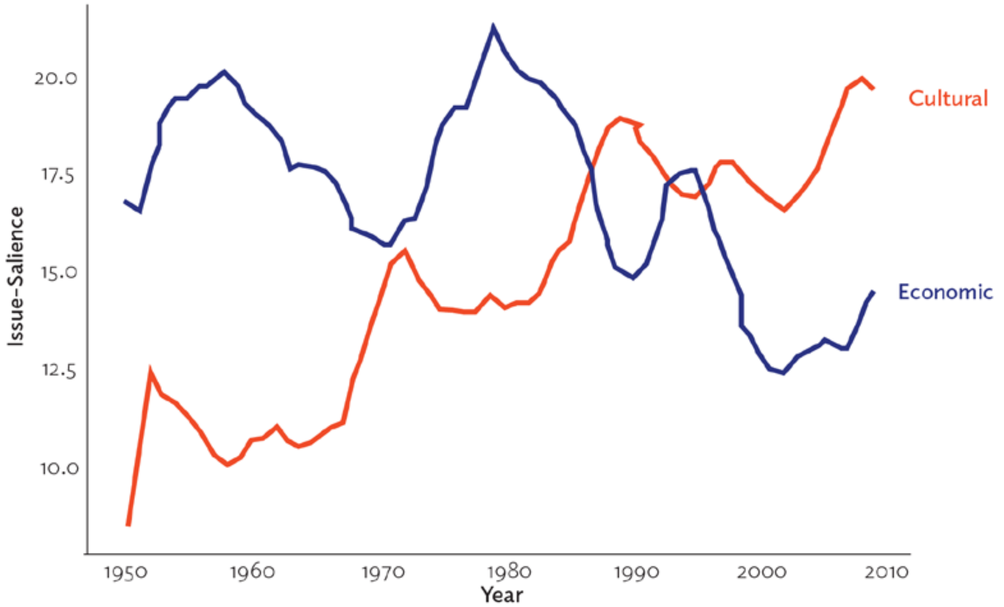
Source: British Social Attitudes Surveys, 1983-2020

It is no mystery as to why younger generations might be turning their backs on the current Conservative offer, while older generations are drawn to it. Policy choices made by the current government have repeatedly favoured older people, such as protecting pensions and propping up a broken housing market, whilst ignoring issues affecting younger voters like childcare provision. Added to that are headwinds that would have hit any party in power: generation-on-generation economic progress has ground to a halt as growth has stalled.

More widely, culture change has been put at the heart of politics much more than in the past. This is a long-term trend, as shown in a study of party manifestos across 21 Western democracies, where the number of promises focused on cultural and values issues has doubled since the 1950s, as the number of economic promises has declined. In the UK, Brexit amplified this cultural turn in politics, centring first on immigration and subsequently evolving more widely into 'woke versus anti-woke' issues.

The number of promises in party manifestos focused on cultural and values issues has double since the 1950s

Changes over time in the relative prominence of economic and cultural issues in the party manifestos of Western democracies



NB: Proportion of references to each type of issue in party manifestos weighted by party vote share in the most recent election for each country

Source: Comparative Party Manifesto Dataset, Electoral Politics of Growth Regimes, Cambridge University Press June 2019, Peter A Hall

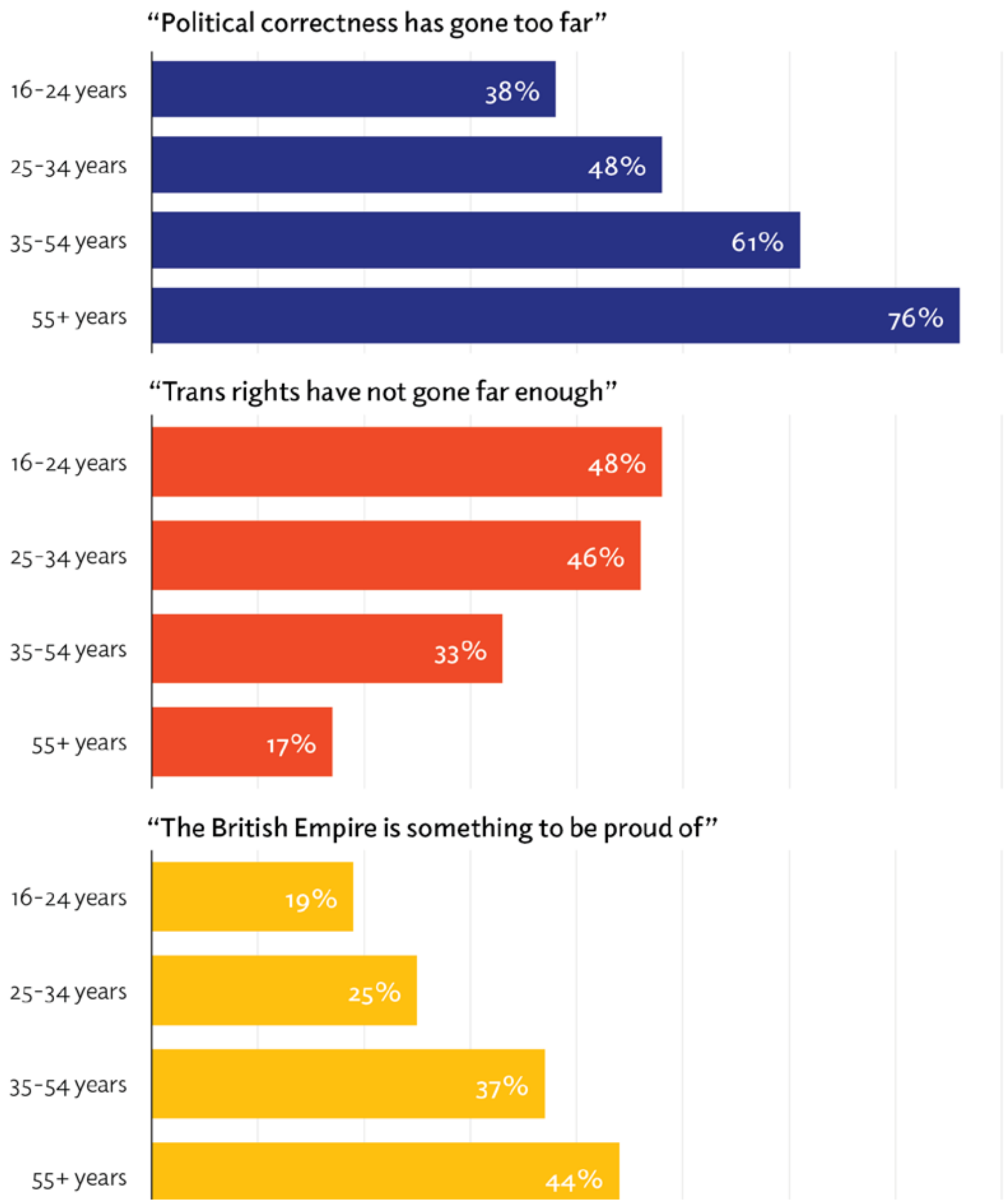
Whenever you put a binary battle over cultural visions at the centre of politics, you are building in an automatic age division. There is an immutable truth that younger groups will, on average, be more comfortable with changing social norms than older generations, and that's certainly the case on the 'culture war' issues parties have increasingly focused on. As the charts below show, there are steep age gradients on attitudes to political correctness and free speech, trans rights and the British empire.

A vital point to bear in mind, however, is that there is always a strong difference between old and young on emergent social issues. The chart below is from surveys in the mid-1980s, when Baby Boomers were the younger adult generation. This shows that they were half as likely as their parents and grandparents to agree that men should go out to work and women should stay at home. But, when you roll that forward to 2021 and change the issue to whether we should be proud of the British empire, Gen Z are half as likely to agree that we should than the now older generation of Baby Boomers.

The issues have changed but the gap between generations hasn't markedly shifted. The real difference between then and now is *not* that we have a particularly unusual younger generation of 'social justice warriors' or 'snowflakes'. Rather, it is how central these issues have become to party politics, helping to drive a wedge between the age groups in voting intentions.

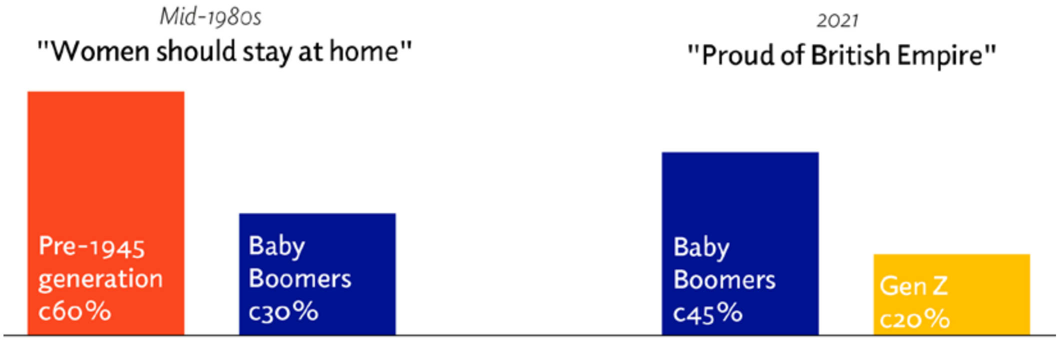
Younger voters tend to be more liberal on 'culture war' issues

% Voters per age category who agree with the following statements



Source: Culture Wars in the UK, the Policy Institute at King's College London and Ipsos UK, 2023

Data shows that there is consistently a difference between old and young voters on emergent social issues



Source: British Social Attitudes Surveys, 1983-2020

In the end, there seems to be little that the Conservative Party can - or really wants - to do to close this age division ahead of the election, as it continues to focus on appealing to its older base. But this is not to say we are seeing the generationally driven destruction of the Tories. These are policy and positioning choices, not yet a political destiny driven by demographics. It is too late to turn it around for the next election, but the choice remains beyond that.

Equally, Labour cannot simply rely on a rising generational tide to shift voting patterns in its favour. It needs to listen carefully to Millennials and Gen Z. These generations are not particularly left leaning economically compared with older generations; they are the least likely to say more should be spent on welfare, as the youngest generations have always tended to do.

They come at the end of a long drift to individualism, where we have increasingly come to believe we must fend for ourselves. Yet they also see that success is harder to come by through individual effort than for previous generations. The future seems to be increasingly rigged by 'outside forces', inspiring growing resentment and a dwindling faith in a better future. It will be just about impossible to restore belief in generation-on-generation progress without confronting issues Labour has shied away from, with truly radical interventions in the housing market and on wealth taxation.

Labour has a natural advantage with these younger generations, but it will quickly dwindle if it doesn't develop a more hopeful generational vision in the run-up to the election - and then deliver on it if it wins.

GENDER

Professor Rosie Campbell

For most of the period since World War II, women have been more likely to support the Conservative Party than men. Women's support for right-wing parties was explained by their greater religiosity, the association of conservative parties with establishment religions, and women's lower level of exposure to social institutions of the left such as trade unions.

However, the 2017 election witnessed a dramatic reversal of this traditional pattern. A 'modern' gender gap appeared in the support for the two largest British national parties (see figure). For the first time, a greater proportion of women than men voted for Labour, with the reverse true for the Conservatives. The UK finally ceased to be an outlier in the global trend (apparent in the US since 1980) whereby, as more women entered paid work and higher education, they moved to the left politically. This reversal of the gender gap in the UK proved not to be a blip and was repeated in 2019.

Aggregate level data does, however, mask significant differences within age cohorts. Younger women are significantly more likely to support Labour and less likely to support the Conservatives than younger men, but this modern gender gap diminishes across the generations and disappears among older voters.

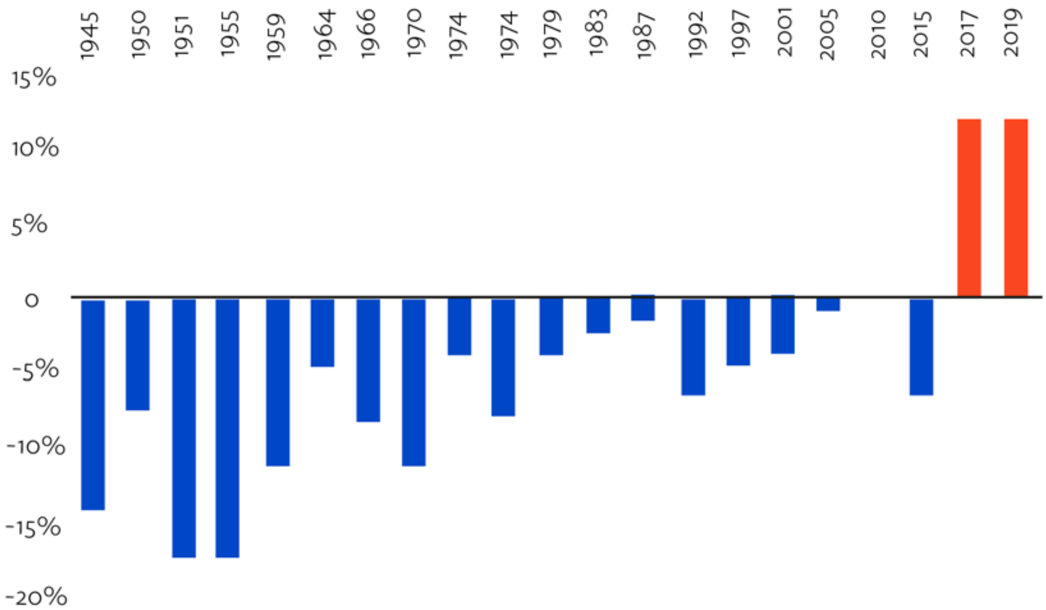
Analysis has suggested that the gender-generation gap apparent in 2017 can be accounted for by women's greater concerns about household finances and the NHS compared to men, leading them to vote for the opposition. In 2019, differences between younger men and women's attitudes towards Brexit was a critical factor.

The modern gender gap is still evident. Data from February 2023 shows the same gender pattern, with Labour ahead of Conservatives by 28% among women, compared to 22% among men.

Again, aggregate level data masks differences between subgroups, divided by age and other factors. Geography is one such factor. Data produced by Labour Together shows a specific type of women voter - labelled the 'Stevenage woman'- who will be essential if Labour is to win a majority at the next election. Too often, media and politicians focus almost exclusively on the so called 'Workington man', or disaffected former Labour voters in post-industrial areas such as the Red Wall, who are necessary but insufficient when it comes to ensuring a Labour victory.

The 'traditional' party gender gap has been reversed at the last two elections, with women more likely to vote Labour

The British two-party gender gap, 1945-2019



Source: Gallup polls, 1945-59, British Election Study 1964-2019. Adapted from P Norris 'Gender: a gender generation gap?', 1999

'Stevenage Woman' is a younger voter, struggling with the cost-of-living crisis, and living in suburban areas, which are often marginal Labour/Conservative constituencies. These voters are not strong partisans and were greater supporters of the Conservative Party in 2019, but now have shifted towards Labour.

The description of the 'Stevenage Woman' as a weak partisan is in keeping with findings from academic research on gender differences in political participation. Women tend, on average, to be slightly less interested in formal politics than men. As it is those people who are highly engaged with politics who tend to develop strong party loyalties, women are disproportionately represented among the group who have no strong party ties, and instead decide how to vote closer to the election.

More widely, women are also over-represented in lower income households and express greater concern about their financial security and the state of the NHS. At present, the Labour Party has an advantage among voters who hold these twin concerns, accounting for a significant portion of Labour's advantage among women- particularly younger women voters.

So, what does this mean for the next election? At 51% of the adult population, and a slightly higher proportion of eligible voters (given women's greater longevity and the fact that men constitute 95% of the prison population, mostly ineligible to vote), women's votes are essential to secure an electoral majority.

Men and women's voting patterns and issue priorities are more similar than they are different. However, given the size of the populations involved, even small differences in gender vote choice can have a huge impact at the ballot box. None of the parties can afford to ignore the modern gender gap which has emerged in recent elections.

Labour must be wary of taking women's votes for granted, given their weak partisan ties and over-representation among swing voters. Meanwhile, the Conservatives must make efforts to improve their reputation on those issues women emphasise more than men, particularly the cost-of-living crisis and the state of the NHS.

NATIONAL IDENTITY

Sunder Katwala

Few voters would cite national identity as a decisive factor in how they cast their vote. Yet the politics of national identities have reshaped British politics during the last decade. The outcome of this General Election will be affected by how the political parties navigate a more complex politics of national identities in what has become a much more consciously multi-national polity than it was before 1997.

Do we really have a 'British General Election' any more? The House of Commons is the aggregated result of four parallel contests, with different party systems and leadership voices across the UK nations. The identity politics in a multi-national Britain are partly existential questions as to whether national and British patriotisms must compete or can complement each other. The electoral politics of national identity differ significantly because of how these arguments are contested within and across nations.

Identity arguments can also get lost in translation because ideas about British identity vary significantly across nations. Those who felt more strongly British leant heavily Remain in England yet Leave in Scotland, because holding a stronger British identity has the inverse sociology in Scotland - being older, more Christian, white, more traditional and more Eurosceptic - than England, where it is a younger, left-leaning identity, stronger in university cities and among ethnic and faith minorities.

Indeed, the two groups tending to report the highest levels of attachment to British identity have long been pro-Union Protestants in Northern Ireland and ethnic minorities of Commonwealth heritage in England's cities, reflecting Birmingham's pride in the legacies of Windrush and the invention of the great British Balti.

The relationship between national identity and voter choice clearly remains strongest in Northern Ireland. There, it underpins a party system still largely representing two parallel communities, rooted in Protestant unionist, and Catholic nationalist traditions. There is a significant long-term social trend, particularly across the generations, a Northern Ireland identity, or a third force of the 'nones' who do not identify with one of those two traditions in a more secular age, However, this has to date had only a limited impact on the Northern Ireland party system, with modest gains for the Alliance Party, partly because the Unionist and Nationalist parties have institutional advantages as established parties, including having incumbent MPs.

The 2011 and 2021 censuses present a dramatic and rather misleading picture of national identity in England. A decade ago, 71% declared their national identity as English yet only 19% did so a decade later. Those choosing British surged from 19% to 55%. In reality, there was no such volatile swing in national identities. Rather, the Office of National Statistics changed the order in which those options were listed. Whichever boxes we tick, both British and English identities are widely held in England.

The relationship between these identities and voter choice is, however, shifting. In England, Labour's poll lead reflects more gains among Leave than Remain voters, albeit from a much lower base. It has less support from those with the strongest English identity, but the gap has narrowed. The strongly English-identifying Leave voters who helped drive the Conservative's 2019 gains are now splintering between the Conservatives, Labour, the Reform Party and not voting.

Scottishness still reaches across Scotland's political cleavages, being shared by supporters and opponents of independence, where British identity divides people along partisan and referendum tribes - increasingly being associated with support for the Union.   The 2014 independence referendum polarised Scotland, with the SNP securing a dramatic realignment as a consolation prize from the pro-independence 45%. The swing seats in the General Election will often be decided by the votes of almost half of the population (44%) who feel 'more Scottish than British'.   The argument between the parties may be about what each election is for - with Labour arguing for 2024 and 2026 being about who governs in Westminster and Holyrood - and the SNP seeking to persuade voters to prioritise the call for independence each time. Voters thinking about different contests as distinct would help to explain how Labour has picked up voters from the SNP for the UK General Election without support for and against independence shifting significantly.

The relationship of the Welsh language and identity to politics in Wales has also shifted after Brexit. Welsh-speaking and Welsh-identity were associated with a Remain vote while those who felt more strongly British identities drove a Conservative revival before 2019 which, as Richard Wyn-Jones and Jac Larner note, has been checked as the salience of Brexit has dropped. Welsh Labour in office has arguably had more success than its English and Scottish equivalents in opposition in being a pro-UK party with a both/and approach to Welsh and British identity.

Liz Truss was a Conservative leader keen to emphasise patriotic optics and language. If flying the biggest flag was the magic bullet then Truss - who organised a photoshoot to be pictured with the largest Union Jack in the UK - may have won a landslide victory, rather than suffering the shortest premiership in history.

Rishi Sunak has placed less emphasis on national identity. This partly reflects the pressure of events. Sunak made social history by becoming Britain's first Asian Prime Minister, but he has preferred to suggest that what makes this a very British story of progress is that people don't notice.

Sunak has an optimistic story about Britain as the world's most successful multi-ethnic democracy, yet his former Home Secretary emphasised the challenges of a country struggling with what she called the 'toxic failures of multiculturalism'. Party calls for constitutional change have moved away from England's voice in the UK towards reviving arguments about the Human Rights Act and the European Convention on Human Rights over asylum. Those pushing a 'war on woke' as an electoral theme appeal to particular ideas of national identity over history, race and statues, but are more focused on challenging 'wokeness' over gender identity and trans rights.

Keir Starmer's Labour election campaign will seek to have a patriotic framing of its state of the nation argument, reflected in the 'Give Britain Its Future Back' slogan of the 2024 party conference, and the reissuing of party member cards with Union Jacks. The party's campaign in swing seats is targeting English identifiers in towns and red wall marginals, those with a Scottish identity where it is taking on the SNP, and a range of Welsh and British identifiers in Wales.

If Labour secures a majority, national identity will be a much weaker correlate in voting choice in 2024 than it was in 2019. The polls suggest the 'time for a change' message is bridging a broad electoral coalition effectively. Whether a party governing under significant economic pressure can continue to bridge identity divides, however, is less certain.

TRUST AND FAITH IN POLITICS

Dr Lawrence McKay, Professor Will Jennings and Professor Gerry Stoker

Trust in politics is low. Figures published by the Office of National Statistics in 2022 found that only 20% of people trust political parties, and only a third trust Parliament and government. Our recent study with the Institute for Public Policy Research found a strong decline in trust in politics over time: in 1944, just one in three British people (35%) saw politicians as merely 'out for themselves', while in 2014 that number was 48% and by 2021, 63%. But what impact does lack of trust have on voting behaviour? And in particular, how might it influence the outcome of the forthcoming general election?

Two themes stand out from existing research. The first is that trusting citizens are more likely to engage with politics and to vote. This isn't as obvious as it might sound: distrust could mobilise people against failures or betrayals by the political class, while trust could breed complacency, leading people to tune out and stay home. But the weight of evidence supports the idea that it is low trust voters who disengage and abstain, and high trust voters who participate.

Those who lack trust are also more likely to vote for populist parties. Parties who present themselves as for ordinary people and against corrupt, out-of-touch elites naturally appeal to voters who lack trust in established political parties and institutions. But the strength of this appeal also depends on 'political supply': whether there is a *viable* populist party - one that is well-organised, charismatically led, and has some media backing - that can attract low trust voters.

When we last analysed the link between Brexit and trust, using data up to June 2020, we found that Brexit had led to an inversion of the usual dynamics of political trust: Remainers (and typically Remain-supporting demographic groups) had become less trusting of MPs than Leavers (and Leave-leaning groups). Were this trend to be sustained, it could turn *Remainers* into the constituency for protest voting or turn them off voting entirely.

Two questions arise. Firstly, has this reversal endured or have voters' trust attitudes returned to 'normal'? Secondly, thinking towards the next election, how do divides in voting intention reflect changing divides in voter trust?

Extending our previous analysis, we use panel survey data provided by the British Election Study Internet Panel to explore movements among voters with different levels of political trust. The Sankey chart presented below tracks the aggregate flow of a group of voters who were repeatedly surveyed. Based on a question about trust in 'MPs in general', 1 being the lowest and 7 the highest, we grouped individuals into three categories: 4-7 as medium/high levels of trust (orange), 2-3 as low trust (blue) or 1 as no trust (green).

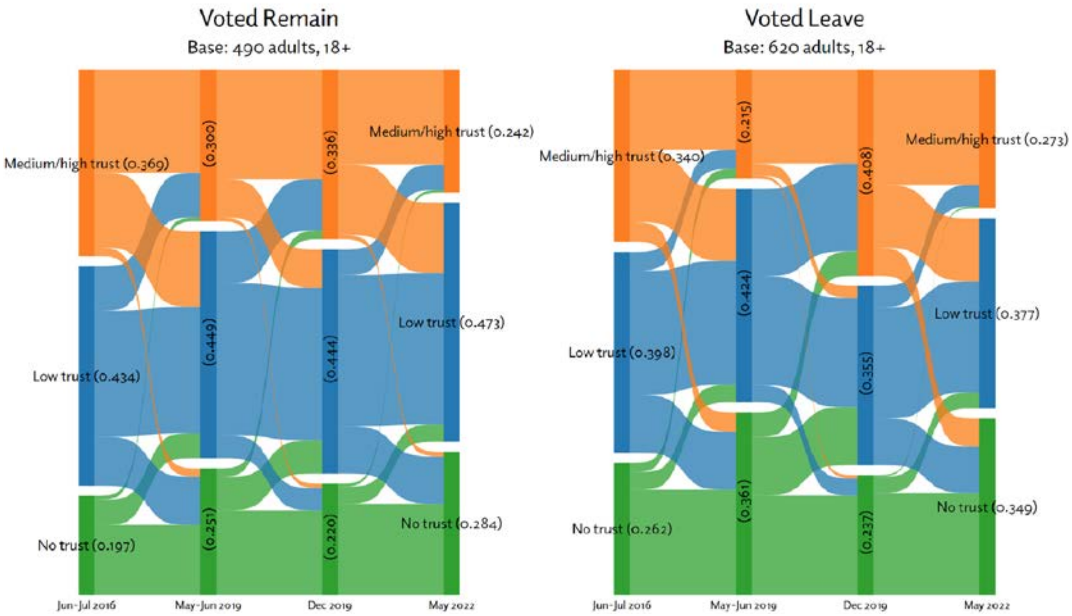
Among Leave voters, many with high trust abandoned that position between the immediate fallout of the referendum, when surveyed in July 2016, and June 2019, shortly before Theresa May was removed as PM. There was a sharp rise in reports of 'no trust' over this period. Leaver trust recovered in December 2019, following Boris Johnson's victory, but has fallen again since. The story is not so different for Remainers - overall we see a rise in no and low trust over the 2016 to 2022 period, with a fall in high trust between July 2016 and June 2019 and again between December 2019 and May 2022.

Overall, two stories stand out from this data. The first is Leavers' overall propensity to be 'no-trusters' or 'low-trusters' has not changed over seven years since the referendum: they are consistently more likely to have 'no trust' in MPs than Remainers. The second is that among both groups, when we look at changes in trust over this period, we are talking about rather marginal changes. Claims that Brexit has rebuilt or destroyed trust are not supported by evidence. As a result, the climate of political trust for any election held in 2024 or early 2025 is not too different to that prevalent when the Brexit referendum was held in 2016.

Trust in MPs has fluctuated since the referendum- but Leavers are more likely to have 'no trust'

Aggregate flow of voters with individuals classed as either high, medium, low or no trust voters

UK IN A CHANGING EUROPE



Source: L McKay, W Jennings and G Stoker using data from the British Election Study, 2023

What consequences might these trust dynamics have for the next election? On the one hand, Leavers' drifts back into disaffection could drive them towards the right-wing populist Reform party, or towards non-voting. The options for disaffected Remainers might be different. Remainers' higher confidence in understanding and influencing politics means even distrusting Remainers are likely to vote.

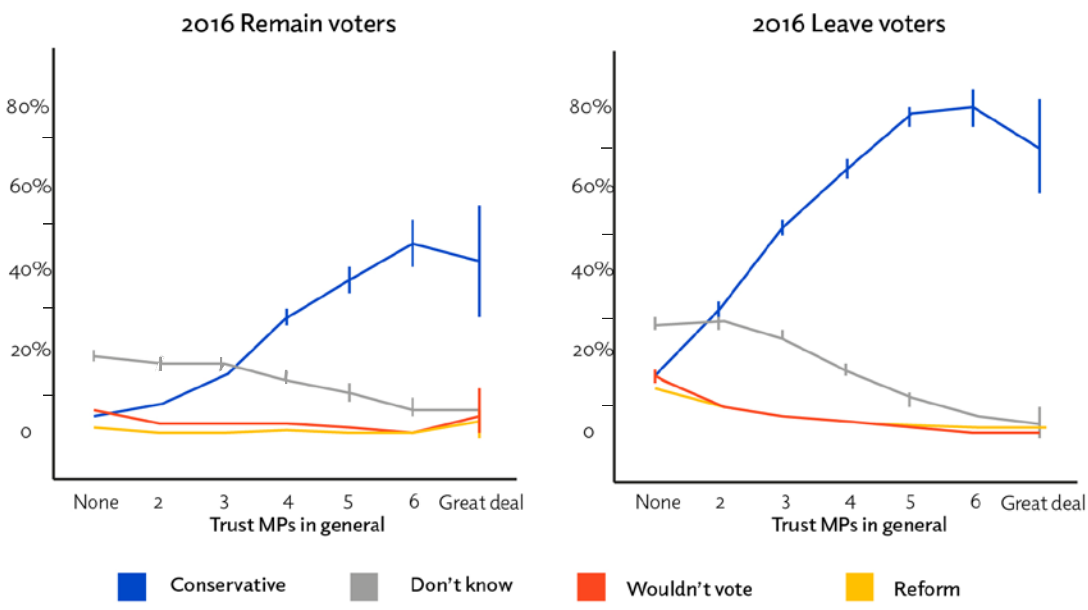
The most recent data available on voting intention from the British Election Study, shown in Figure 2, supports this. Firstly, Reform (plotted in yellow) draws almost all of its support from distrusting Leave voters: virtually no Remainers at any level of trust support the party. Secondly, distrusting Leave voters are particularly likely to say they would not vote (red) compared to distrusting Remainers. We also see that 'Don't Knows' (grey) are higher among distrusting Leavers than Remainers. All in all, around half of the least trusting Leavers say they either don't know who they would vote for, would not vote, or would vote Reform: the combination of distrust and support for Brexit drive widespread hostility to the political mainstream. Among the least trusting Remainers, on the other hand, the most popular party is Labour (43%) followed by the Liberal Democrats (13%) - there is less rejection of the mainstream parties among this group, although the Greens (9%) make their strongest showing among this group.

A more surprising finding is how trust relates to Conservative support (blue), with a much stronger link for Leavers than for Remainers. This implies that the loss of trust among Leavers since 2019 may be particularly damaging to

Low trust in MPs drives non-voting and Reform Party support, but largely among Leave voters

Vote intention by trust in MPs, May 2022

UK IN A CHANGING EUROPE



Source: British Election Study Internet Panel, May 2022

Conservative electoral prospects. Given that the Conservatives' 2019 electoral coalition was built upon dominance of the Leave vote, rising distrust among Brexiteers could spell disaster at the ballot box.

In the 2019 election, the oldest party in British politics won a majority in part by mobilising anti-establishment, low-trust voters. But with trust still low, and discontent rising, the governing Conservative Party face a major challenge in holding on to and turning out these sceptical voters at the next election.

ELECTORAL VOLATILITY

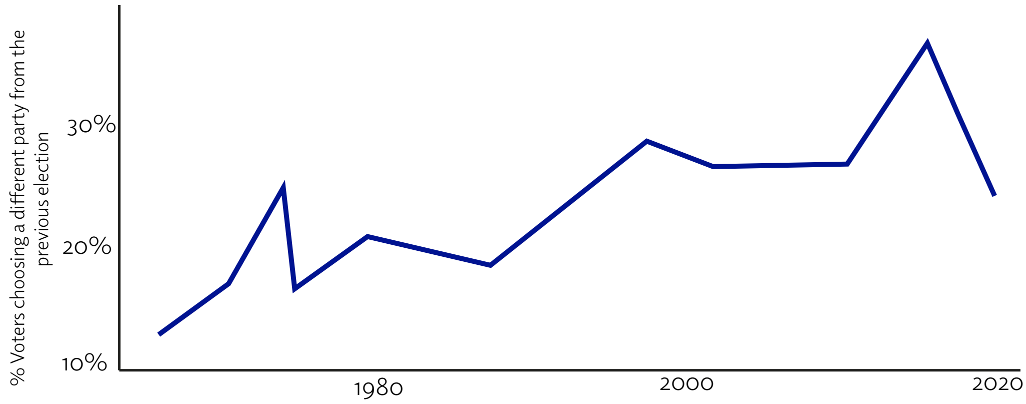
Professor Jane Green and Dr Dan Snow

Observers of British politics risk pushing the 'everything's volatile now' line too far. An increasingly unpartisan electorate does not mean that every election will be unpredictable, nor that every vote is now 'up for grabs'. Instead, each election is different, with factors that decrease volatility in the short term, and factors that increase it over time. The next election may well see record levels of switching, or we may not come near the peak we saw in 2015.

Prior to the 2019 election, the British Election Study (BES) team reported on the increasing volatility of the British electorate. Since the first election analysed for the BES in 1964, there has been a steady increase in the proportion of people voting for a different party to the one they voted for the last time around. This 'between-election switching' peaked in 2015, with a slight drop-off in 2017, and again in 2019.

Voters have become more likely to change the party they vote for at each election over time

Between-election switching, 1964-2019



Source: Fieldhouse et al., 2023

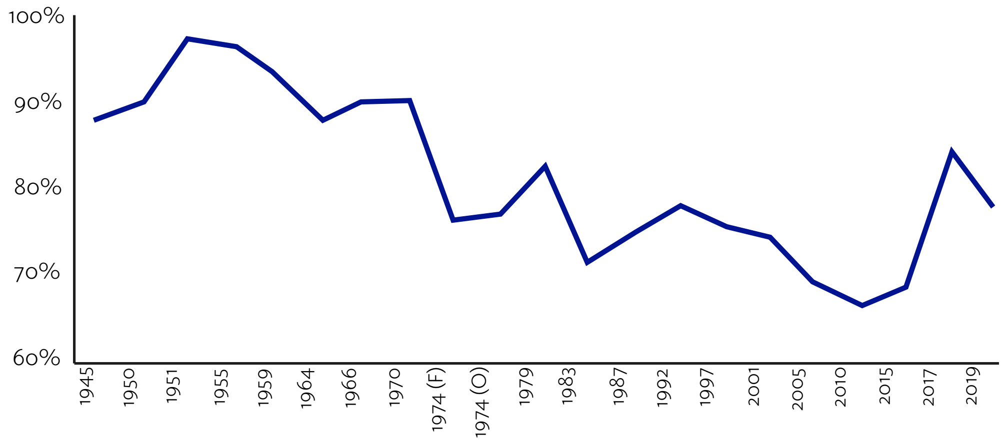
This rise in volatility has been explained by two things. First, by the long-term, gradual changes that have taken place in the electorate. One such change is that, over the long-term, voters have become less strongly aligned to political parties. This weakening is best explained by generational change, with younger voters less likely to form a partisan attachment than their parents. This has been coupled with a rise in party system fragmentation (the number of parties gaining a sizeable share of the vote). People who vote for a minor party are more likely to switch their support in the subsequent general election, leading to more switching.

The second factor is the major discontinuities that shift voters, which we call 'electoral shocks'. The patterns described above were compounded by a series of electoral shocks that caused still more switching, including (but not limited to) the sharp rise in net migration since 2010, the global financial crisis of 2008, the Scottish independence referendum of 2014, the coalition government of 2010-15, and – of course – the Brexit referendum.

It is important to recognise that much of the voter churn seen in 2017 and 2019 was caused by a 'realignment' of the electorate around the issue of Brexit. At these elections, the bulk of Conservative support came from those who voted for Leave, whilst Labour was supported primarily by Remain voters. This 'sorting of the electorate' has not, so far, been significantly reversed, and gave some stability to party choice at the last two elections. Indeed, the figure below shows that the two largest parties scooped up most of the votes cast in 2019, also likely contributing to a period of greater stability.

Recent elections have seen some recovery in the two main party's vote share after a prolonged period of decline

Conservative-Labour combined vote share, 1945-2019



Source: House of Commons Library, 1945-2019

However, going forward, levels of partisanship are unlikely to rebound significantly, particularly given declining trust in politics. Additionally, the UK has experienced its fair share of additional electoral 'shocks' since 2019, from the Covid-19 pandemic and 'partygate', to the Truss interregnum and the cost-of-living crisis.

BES data from May 2023 does indicate that the electorate is potentially volatile again as we head towards the next election. Just 45% of those who voted for the Conservative party in 2019 said that they would do so if an election were held tomorrow. The trashing of the party's reputation by further competence shocks has cut through.

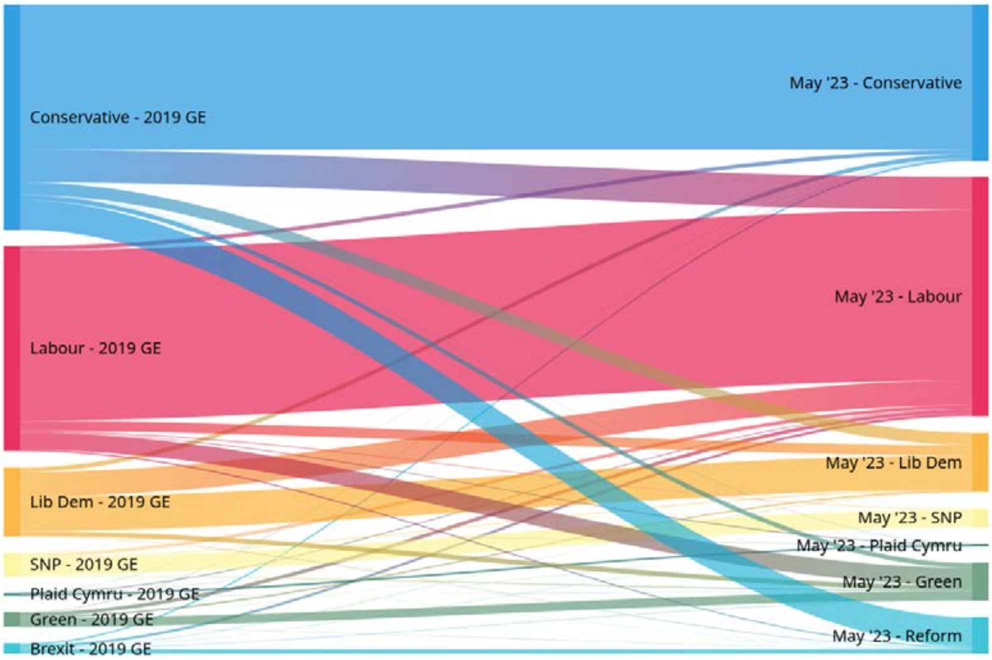
Some of these voters have switched to 'undecided'. Yet a large proportion (37% of 2019 Conservatives and 32% of all voters) say they would vote for a different party to the one they voted for in 2019. If repeated at the next election, this would place the rate of between-election switching at levels comparable to 2017.

Some of these switchers have turned to supporting minor parties, as can be seen in the Sankey diagram below. In a first-past-the-post system, where tactical voting is a consideration, minor party votes are likely to be squeezed on election day. As we discussed above, such a squeeze might well suppress the level of volatility. It is also too soon to say whether the Conservatives will regain some of their former 2019 support, which would reduce the level of volatility further.

Many 2019 Conservative voters have since switched their support to smaller parties as well as Labour

Flow of 2019 general election votes to voting intentions in May 2023 (excluding those without a voting intention)

UK IN A CHANGING EUROPE



Source: British Election Study, 2023

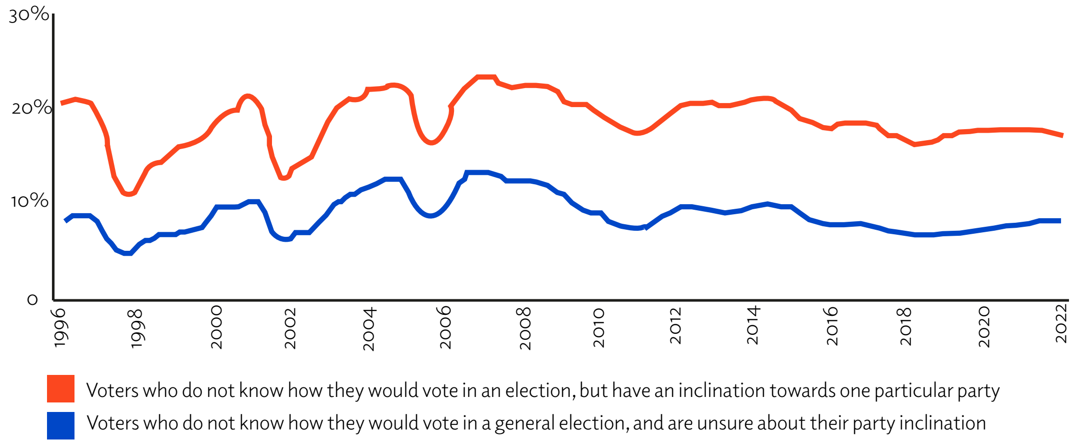
It remains to be seen whether the next election sees a lot of switching compared to 2019, or even gets to the level seen in 2015. Neither of these two outcomes is inevitable. We shouldn't think that, just because we've had very volatile elections in the past, everything is up for grabs come polling day, or that every election will be as volatile as the one before it. The level of volatility is an outcome of partisanship and other aligning forces (such as the realignment around Brexit), the fragmentation of the party system, and the impacts of electoral shocks.

UNDECIDED VOTERS

Sophie Stowers and Professor Paula Surridge

Amongst all the talk of poll leads, by-election results and voting intentions, it is easy to forget about one important group: those who are still undecided. Polls indicate that around 16% of voters are currently 'don't knows', a relatively consistent number compared to previous elections and in line with growing trends of weak partisanship and voter volatility.

Proportion of undecided voters over time, 1996 - 2022



Source: Ipsos Political Monitor, 1996-2022

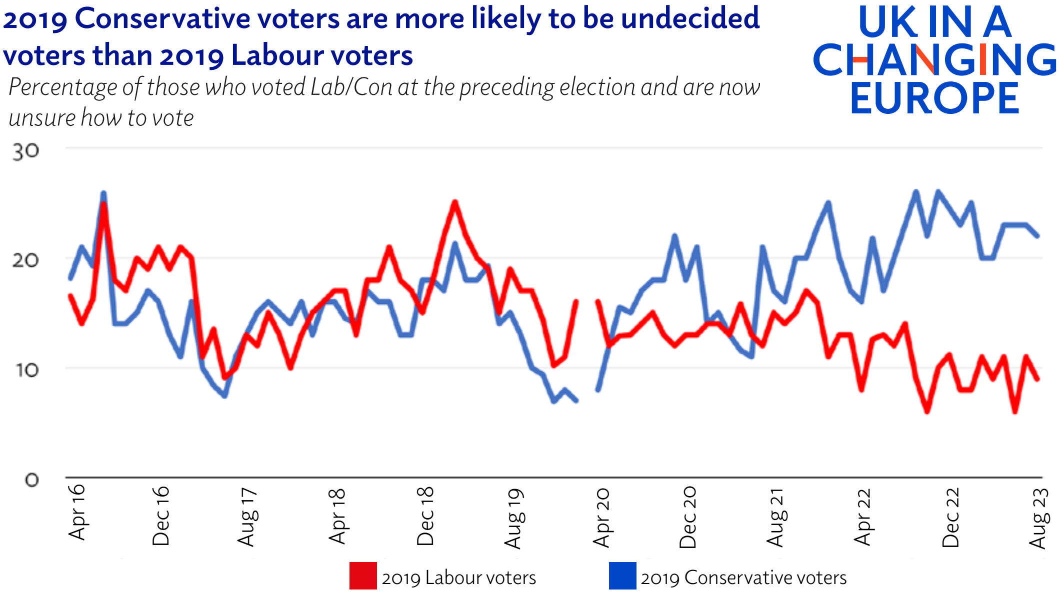
The seemingly quite consistent overall number of 'don't knows', combined with the shift in party support in polls since 2019, may make the next election seem like a foregone conclusion. But around 85% of this undecided group do plan to vote at the next election, and their votes could be crucial, not least in determining the margin of victory. It is certainly worth considering who exactly the undecideds are.

British Election Study data from May 2023 allows us to delve into their demographic makeup. Of those who say they do not know who they will vote for at the next election, most have above a GCSE-level education, with over 40% having a university degree. They are spread across social grades, though are slightly more likely to be lower middle or skilled working class and are scattered across the country. Undecided voters also tend to skew older, with over half aged 55 and above.

Despite this group's relative demographic diversity, over half (55%) voted for Boris Johnson at the last election, with only 16% voting Labour. A partisan gap in the number of undecided voters is not a new phenomenon and was seen among former Labour voters in 2017.

2019 Conservative voters are more likely to be undecided voters than 2019 Labour voters

Percentage of those who voted Lab/Con at the preceding election and are now unsure how to vote



Source: YouGov and British Election Study Internet Panel

Yet the gap between 2019 Conservative and Labour voters saying they are undecided is particularly wide. This suggests that a large portion of those still 'up for grabs' have drifted away from the Conservative party.

An earlier section demonstrates that recent Scandals, from Partygate to Tentgate, have simply put off many voters from voting Conservative again. Not even half of 2019 Conservatives are planning to vote for the party again at the next election, with around 23% saying they do not yet know who they will vote for. Analysis from YouGov shows that, if Labour won over 11% of these ex-Tory voters, this would exceed the number of Labour voters Boris Johnson flipped in 2019.

These *2019 Conservative-2023 Don't know* voters tend to be mostly female, with around 75% being homeowners and 65% over the age of 55. The economy is a key issue to this group, with 65% citing this as the most important issue facing the country - slightly less than for those who have already switched their support to Labour.

There are two key mistakes to avoid when looking at this group of undecided voters. First, there is a presumption that many of these Conservative 'don't know' voters are being pulled towards Reform. This group does share some demographic similarities with Conservative-Reform 'defectors' (both groups tend to be older homeowners). However, their policy preferences are very different. Just 15% of Conservative 'don't knows' cite immigration as a key issue. Meanwhile, 59% of those now intending to vote Reform prioritise immigration, with issues such as crime and asylum also much more important to this group.

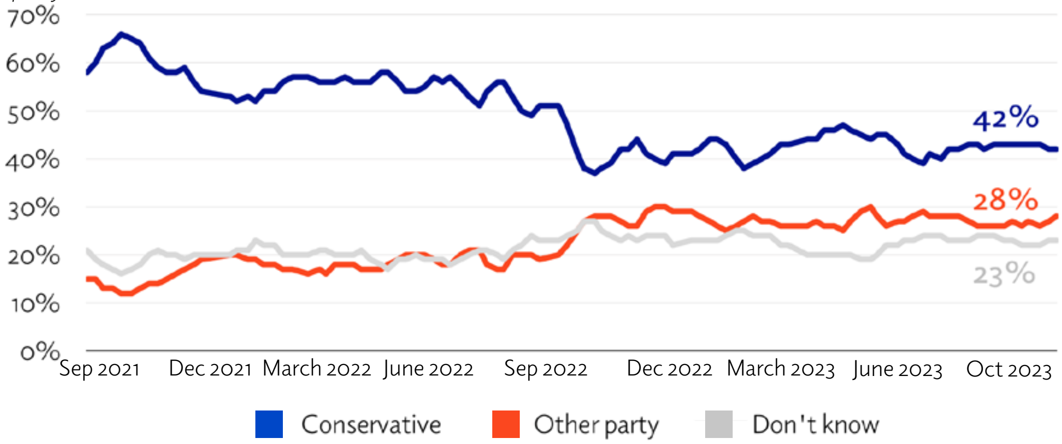
Conservative-to-Reform voters are also much less approving of Sunak (-37 net favourability) and Starmer (-89 net favourability) than Conservative 'don't knows' (+7 and -55 respectively). These groups are not one and the same.

Indeed, data from Redfield and Wilton shows that many undecided voters are not leaning towards Reform, but rather to Labour, the Liberal Democrats or the Greens. Sunak therefore faces losing dissatisfied 2019 Conservatives not only to the right and Reform, but also to parties of the left.

A second mistake would be to assume that, at election time, many of these undecided 2019 Tory voters will simply 'return home' to the Conservative Party. Some presume that if voters have yet to cross the threshold and say they will vote for another party, they can be won back by those they voted for previously. Previous research shows that this did indeed occur for Theresa May in 2017 and, crucially, Jeremy Corbyn at the same election.

A large number of 2019 Conservative voters are unsure if they will vote for the party again at the next election

% of 2019 Conservative voters saying they intend to vote Conservative / another party/are unsure



Source: YouGov voting intention tracker, 2 September 2021 - 18 October 2023

The number of 2019 Conservative 'don't knows' has dropped since Sunak took over from Liz Truss in 2022. Data from Ipsos shows uncertain Conservatives are more likely to lean towards returning to the party than going elsewhere. These figures provide some evidence that, at an election, the Conservatives can reel some undecided voters back and eat into a Labour majority.

Yet this ignores two things. First, the decrease in 'don't knows' among 2019 Conservative voters since Sunak took over can be attributed to a large shift towards Reform among them. Indeed, 78% of those intending to vote Reform at the next election voted Conservative in 2019.

Second, 'home' for many of those who voted Conservative in 2019 is not with Rishi Sunak. The voter coalition Boris Johnson built in 2019 hinged on Brexit.

This meant that we saw a lot of Leave voting, non-traditional Tories 'lending' their vote to the party in an attempt to 'get Brexit done.' Indeed, of those 2019 Conservatives who are now undecided, 16% voted UKIIP in 2015, and 11% voted Labour in 2017. 47% say they have no affiliation with any particular party.

More widely, the shift of voters away from the Conservative Party to 'don't know', ongoing since 2019, is worse than it was for Theresa May in 2017, and has not really shifted since Boris Johnson's departure in 2022. Nor can it be guaranteed that undecided voters will turn out at an election- the fact they are not enthused enough to lean to any particular party hardly inspires confidence on that score.

The 'don't knows' are an often-forgotten group whose votes will be crucial to the outcome of the next election. The fact that they seem 'up for grabs' from all sides and were such a crucial part of the government's last electoral coalition, means parties will be targeting them- but quite where they'll land seems yet to be determined.

ETHNIC MINORITY VOTERS

James Kanagasooriam and Sophie Stowers

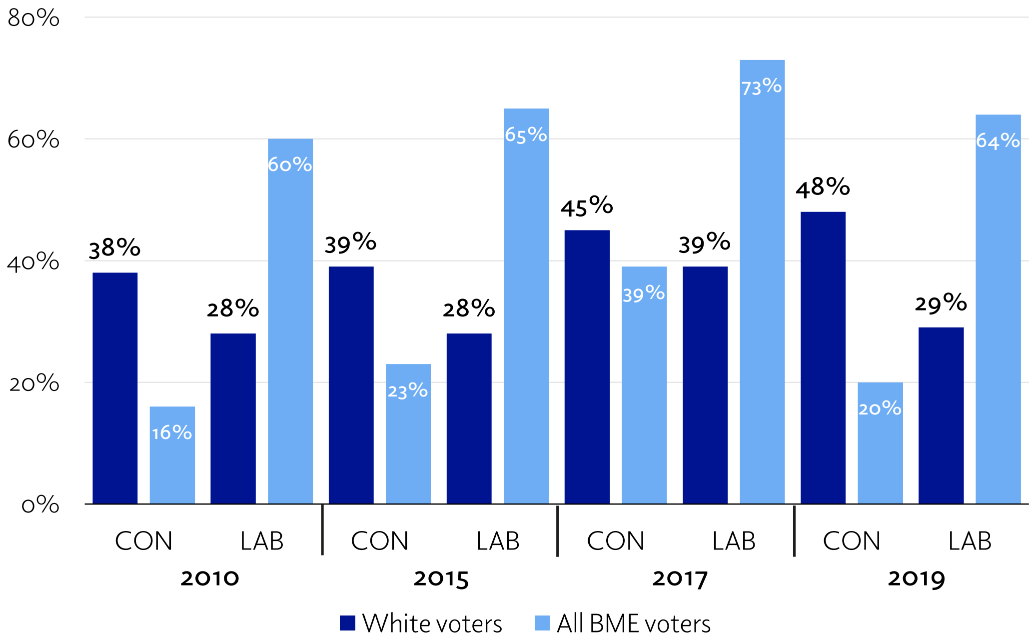
The data discussed in this piece will be released in full in early 2024. Please note the data used here is provisional and weighting schemes may change slightly.

As of 2022/23, it was estimated that around 16% of the UK population was from an ethnic minority background. Despite this, it has been difficult to find any comprehensive data on their political and social views, beyond aggregate snapshots.

Conventional wisdom is that, at elections, ethnic minority voters lean towards the Labour Party, with more diverse constituencies typically associated with a lower Conservative vote share. Existing data shows that in 2019, as in the three preceding elections, vote share for the Labour Party among ethnic minority voters was higher than for the Conservatives. Indeed, at the last election, Labour's vote share was 20% higher among ethnic minority voters than it was among white voters.

The Labour Party has had a consistent lead over the Conservatives among ethnic minority voters

Vote share for the Conservative and Labour parties among white and BME voters at the 2010,2015,2017 and 2019 elections*

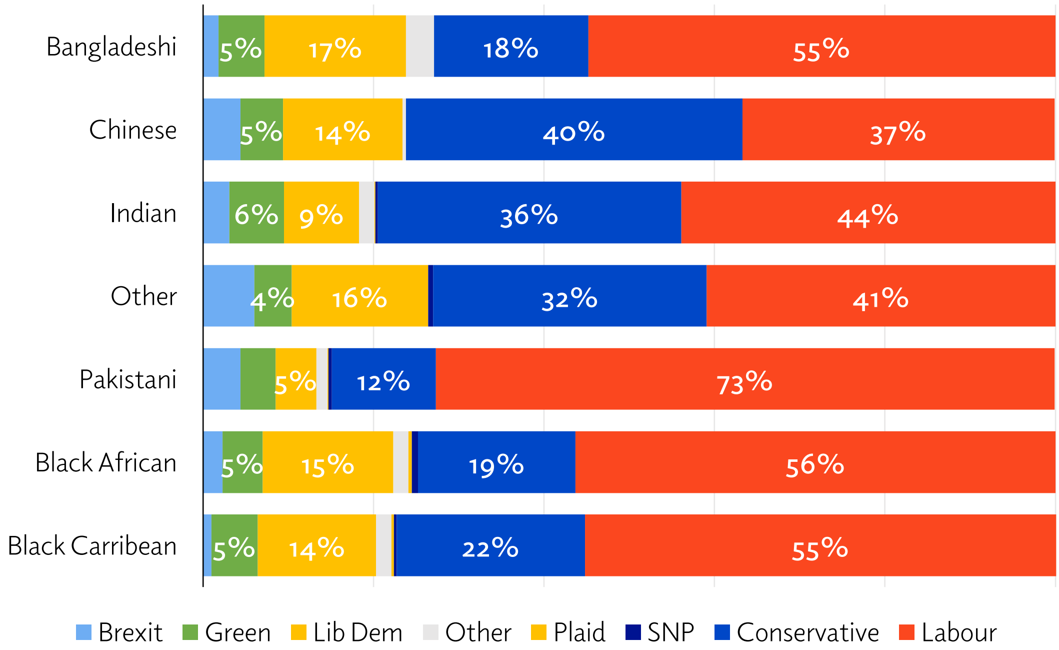


*Source: Ipsos How Voters Voted series, 2010-2019. *BME is the term used by Ipsos in their data collection.*

But new analysis by Focal Data and UK in a Changing Europe considers the diversity of political opinion within the UK's ethnic minority population. Though the pattern above does generally hold - Labour had particularly strong leads among Pakistani, Bangladeshi, Black African and Black Caribbean voters in 2019 - the Conservatives had leads among British Chinese voters and narrowed the gap with Labour significantly mong Indian voters. Moreover, the gap between Labour and the Conservatives in vote share among ethnic minority voters has begun to narrow in recent elections.

The Conservatives have begun to 'catch up' with Labour on vote share among ethnic minority groups

How did you vote in the 2019 General Election, or did you not vote? (Responses broken down by ethnicity)



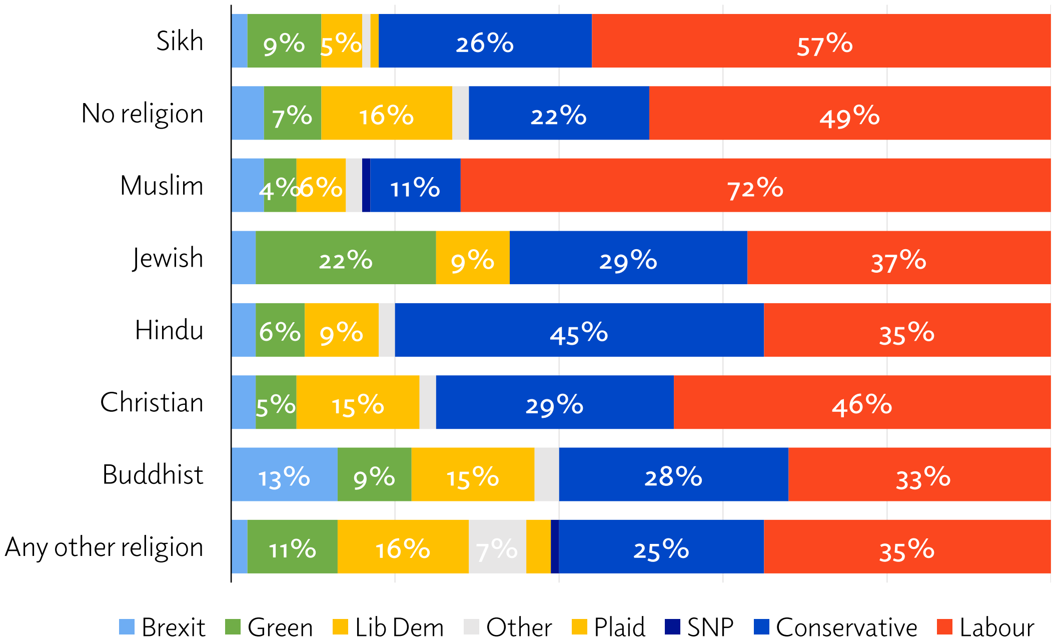
Source: Focal Data for UK in a Changing Europe, May-October 2023.

To treat the voting patterns of ethnic minorities as homogenous, then, is to overlook the complex differences both between and within groups. Our data finds a strong interaction between ethnicity and religion, with an attitudinal split between Sikh and Hindu voters in the Indian community. The former tend to be more left leaning not just in voting patterns (as evidenced in 2019), but also on a variety of value indicators, with the latter voting mostly Conservative in 2019. Similarly, among black voters, we see a split between Christians and non-Christians.

As with any group, these voting patterns are affected by socioeconomic and demographic factors. Age and home ownership have similar effects upon voting intentions among ethnic minority voters as with the white population. Older voters tend to lean toward the Conservatives. Home ownership also tends to have the expected impact, with social or private renters leaning toward Labour, and homeowners to the Conservatives.

At the 2019 election, the Conservatives made significant inroads among Hindu voters

How did you vote in the 2019 General Election, or did you not vote? (Responses broken down by religion)

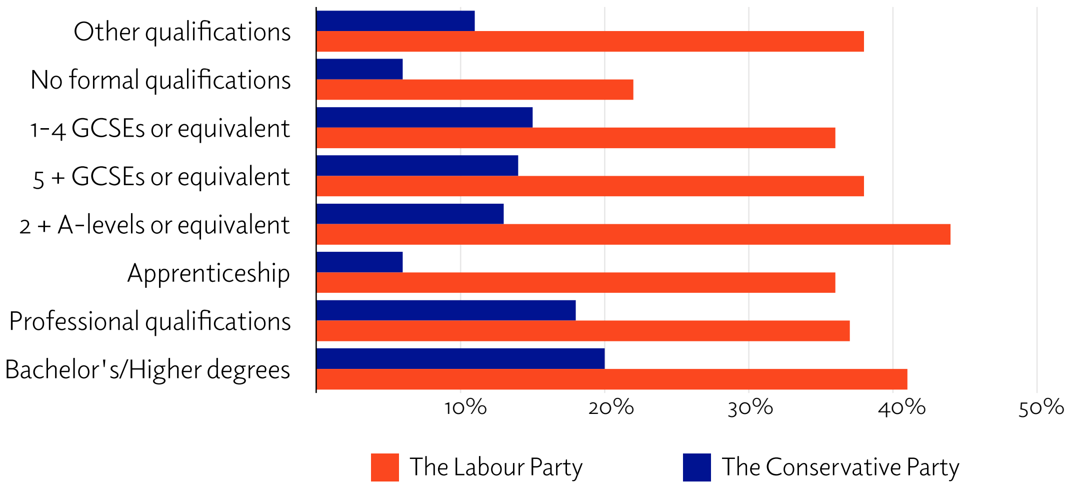


Source: Focal Data for UK in a Changing Europe, May-October 2023.

Yet interestingly, education tends to have the opposite effect among ethnic minority Britons as it has among the white population. Degree holders tend to be more left leaning and more likely to vote Labour (albeit this is a relatively new development). In contrast, ethnic minority voters with degrees or higher-level qualifications tend to lean toward the Conservative Party.

Ethnic minority voters with degrees or higher-level qualifications are more likely to vote for the Conservative Party than those without, inverting the pattern found among white voters

Imagine there was a UK general election tomorrow. Which party would you vote for? (Broken down by education)



Source: Focal Data for UK in a Changing Europe, May-October 2023.

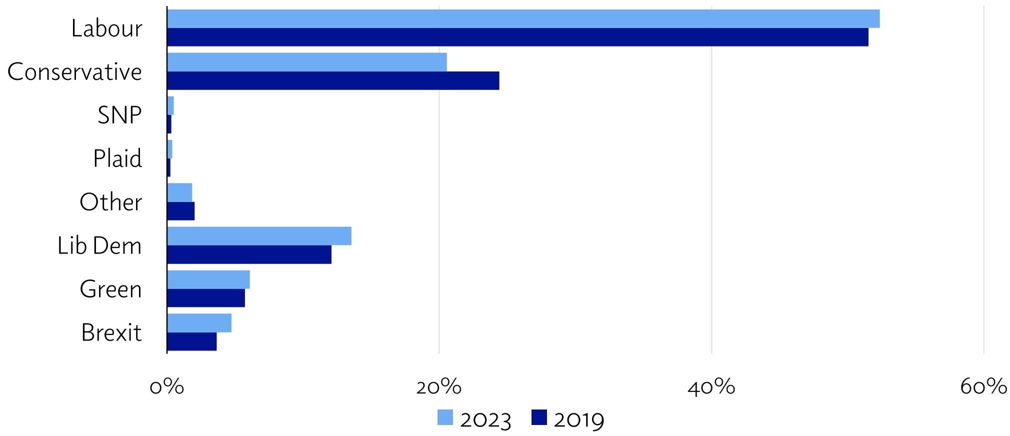
Cohort effects can also constrain these demographic factors, but again, are not straightforward. 'New' immigrants to the UK, along with those minority voters who are fourth or fifth generation (those whose great-grandparents or further back were the first generation to live in Britain) are less likely to lean towards the Labour Party. Yet 'in between' cohorts, so to speak (second or third generations), tended to vote for Jeremy Corbyn in 2019. Again, along with the impact of age, this shows that voting intentions among ethnic minority voters are malleable over time, a caveat often missed by aggregate analyses.

So, what does this mean for the next election? Throughout this report there have been multiple mentions of swings away from the Conservatives and poll leads for Labour. Yet shifts in voting intention among minority voters have been much less volatile than among the white population. Compared to 2019, vote intention for the Conservatives among ethnic minority voters has dropped by around 4%, with a limited increase for Labour.

Changes in voting intention among the ethnic minority population have been relatively small in comparison to the population as a whole

Vote in 2019 compared to voting intention as of 2023 among ethnic minority voters

UK IN A CHANGING EUROPE



Source: Focal Data for UK in a Changing Europe, May-October 2023.

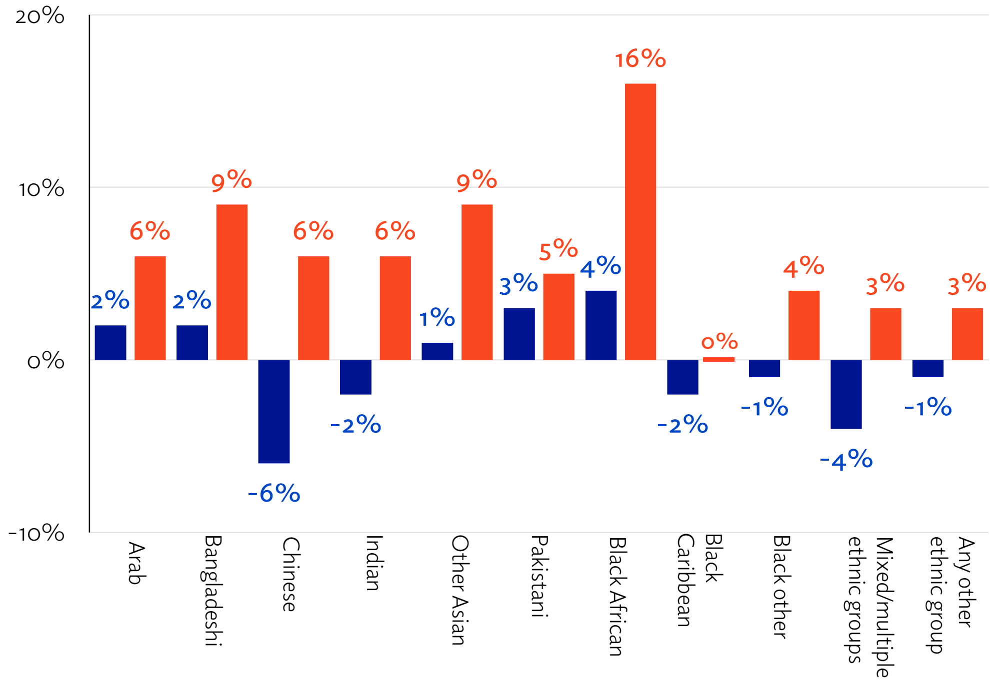
The Conservatives have lost most support among those who tended to most strongly support them, namely British Chinese and Black Caribbean voters, along with Hindus, Buddhists and Sikhs. Indeed, we see this kind of 'swing' away from the Conservatives across different kinds of polling and models, including MRPs, which model individual constituency results. Such consistent patterns only tend to emerge in what are deemed 'change' elections - those in which the government loses votes in proportion to the share they received last time.

This suggests that though the shift away from the Conservatives among ethnic minority voters may not have been as dramatic as it has been among white voters, the Conservatives are indeed losing support among this group.

This does not translate, however, to a huge surge in support for Labour. Admittedly, there has been a relatively large shift in support for Labour among Bangladeshi and Black African voters, compared to 2019. The results below are also generally positive for the party and reinforce the general trend of higher vote share for Labour among ethnic minority voters.

Labour's popularity has increased compared to 2019 among almost all groups of ethnic minority voters

Vote in 2018 compared to voting intention in 2023, broken down by ethnicity



Source: Focal Data for UK in a Changing Europe, May-October 2023.

Yet when we look at the impact of religion, we see a decrease in support for Labour compared to 2019 specifically among Muslim voters, by around 3%. It is important to flag that this polling was conducted before the onset of the Irael/Gaza conflict. But there is clearly some pre-existing scepticism toward the Labour leadership among this voter population. This will have been likely exacerbated by the party's response to the conflict, with the resignation of Labour councillors after comments made by Keir Starmer with regards to the proportionality of Israel's response, and frustration over reluctance to back a ceasefire in early November.

Muslims make up a majority of voters in just three constituencies (albeit all Labour-held). But research conducted in 2019 shows a number of constituencies with a proportion of Muslim voters large enough to potentially sway the result. How long the ongoing conflict will endure, and whether Starmer's response will shift, is yet to be seen, but anger and frustration among the Muslim population could be important to the results in these constituencies at the next election.

Voting behaviour among ethnic minority Britons is complex and differs both within and between groups. This is further complicated by shifts we are seeing based on generational change, education, and aging. That said, patterns of Labour support seem relatively stable as we head to the next election. This, though, must come with the proviso that the gap between Conservative and Labour vote share among BME voters is closing. This does raise the prospect that at some point in the next few electoral cycles, the Conservatives may break the 30% barrier of ethnic minority vote share- and make voting patterns even more unpredictable.

THE RED WALL

Patrick English

At half past 11 on the night of 12 December 2019, the constituency of Blyth Valley declared. An old mining community, represented until that day by Labour stalwart and staunch Brexit backer Ronnie Campbell, the constituency fell from Labour to the Conservatives on a 10-point swing. It was the first seat to flip in that election and would be followed by no fewer than 59 more moving from the red to the blue column.

Of all those seats to fall in Boris Johnson's barnstorming victory, Blyth Valley was among 31 to meet James Kanagasooriam's original definition of the 'Red Wall'.

That phrase is nowadays often applied well beyond that original conception, to encompass 'seats taken by the Conservatives from Labour in 2019', 'working class Labour seats', and even 'places where woke things don't go down well'. However, the initial purpose of the definition was to highlight a significant group of constituencies which, demographically, despite their long association with Labour, looked far more pre-disposed to voting Conservative than previous election results had suggested. In other words, Kanagasooriam identified a string of constituencies stretching across the midlands and north of England in which the Conservatives were underperforming.

The collapse of the Red Wall in that 2019 election, then, was as much a correction to a statistical oddity as anything else; the Conservatives were successful in a host of constituencies where they had been unperforming before.

The result is that many former Labour stronghold constituencies are now competitive. We ought to expect them to swing to-and-fro with the median voter as parties increase and decrease in support, rather than having a baked-in Labour predisposition which could have historically been worth anything up to 10 or 15 points. The 'Red Wall' is in play.

YouGov MRP modelling back in May 2022 estimated that Labour would have been on track win 85 out of 88 key 'battleground' constituencies if an election were held that time, including the classic 'Red Wall' seats of Redcar, Sedgefield, Workington, and Leigh, among others. Labour's national polling lead at that time was somewhere around 8 points. Now, with the lead of around 20 points, most if not all modelling of how the 'Red Wall' would vote predicts a Tory wipe-out. Carry the median voter, and you will carry the 'Red Wall'.

The 'Red Wall' may now be leaning Labour, but whether or not Starmer's party do indeed recapture these old heartlands has different immediate consequences in terms of electoral fortunes for the two parties vying to lead the next government.

For Labour, failing to win back the constituencies across the North and Midlands which fell to Johnson's Conservatives - and indeed to May in 2017 - would spell defeat. Without splashing red paint back across the 'Red Wall', there is no feasible path to a parliamentary majority for Labour. There are not enough winnable constituencies in Scotland, Wales, and the South of England to get Starmer into Number 10.

Conversely, *losing* the Red Wall absolutely does not mean the Conservatives are *necessarily* heading for defeat. If Sunak were to fail to hold those constituencies won by a combination of May and Johnson, the Tory seat total would drop back to around about where it was after their election victory in 2015.

It is no coincidence that David Cameron, who led the Conservatives to that very 2015 victory, has now been brought in at this time in the electoral cycle, with the polling where it is, and with the electoral geography as it stands. His presence, along with other high-ranking Cabinet members from a similar brand of 2010s-Conservativism, is a direct appeal to former Conservative voters who are demanding more competence, and better Conservative management of the country than that which they have become accustomed to.

But it is also a trade-off. Cameron and his brand of Conservative politics - the brand Sunak now seems to want to adopt - are not particularly appealing to the 'Red Wall'. The reshuffle points to a new, defensive electoral strategy on the part of the Conservatives - retreat from the 'Red Wall,' shore up the 'Blue Wall' (Remain-voting, Southern, graduate-heavy seats) and restore their competitiveness in the midlands marginals and bellwethers of old -Nuneaton, Corby, Worcester, and Loughborough.

The Conservatives know that while the 'Red Wall' is crucial for Labour's chances of governing, the same is not true for them.

Indeed, Labour need to push beyond the 'Red Wall' to win the election, charting a course of wins which extends south and into those former bellwethers and traditional battlegrounds of British politics. Labour need to win over 'Stevenage Woman'.

'Stevenage Woman' is the archetype of a particular segment of British voters who are hugely important to any potential election-winning Labour coalition. Known as 'Disillusioned Suburbans', this group is younger than average, economically insecure, tend to be female, tend to have young families, and are highly disillusioned with the parties and leaders currently on offer in British politics. Crucially, they are found all across the country but *especially* in many key bellwether battlegrounds around Labour's 325 target line. In 2019, 'Stevenage Woman' backed Boris Johnson. Now, they're up for grabs.

'Disillusioned Suburbans' differ from the 'Workington Man' swing voters who typically dominate the 'Red Wall' in a number of ways. The latter, the 'Patriotic Left,' are more male than female, tend to be older than average, heavily backed Brexit in 2016 (much more so than Stevenage Woman), tend to have a lower education level, and have a stronger Labour-voting history than their more Southern-suburban cousins.

The differences between these two groups highlight the scale of the task Labour faces to win a parliamentary majority. Yes, they must win back 'Workington Man' and rebuild the 'Red Wall'. But they must also win over 'Stevenage Woman' and become competitive again in places which haven't seen a Labour MP since 2005. For the Conservatives, the game is much simpler - keep Labour out in the marginals and bellwethers of old, and they can lose the 'Red Wall' but still win.

THE BLUE WALL

Luke Tryl

Alongside the Conservatives' historic wins in the 'Red Wall' in 2019, something more subtle was happening in England's leafy suburbs. Traditionally safe Tory seats in the home counties and London commuter-belt did not witness the same swing to the Conservatives evident across the rest of the country. While most of these seats were still ultimately won by the Conservatives, both Labour and the Liberal Democrats achieved increases in their vote share not witnessed elsewhere.

These seats generally have more graduates, are more socially liberal and pro-Remain than the country as a whole. And as the UK's population ages, these Blue Wall seats are getting younger - driven by millennials moving out of London for lower house prices or more space for their families.

This explains why these voters seemed to shift away from the Conservatives in 2019. But in an attempt to move away from solely demographic analysis, More in Common's psychographic segmentation approach used the shared beliefs and values of this group as a way of identifying 'Blue Wall' voters that goes beyond geography.

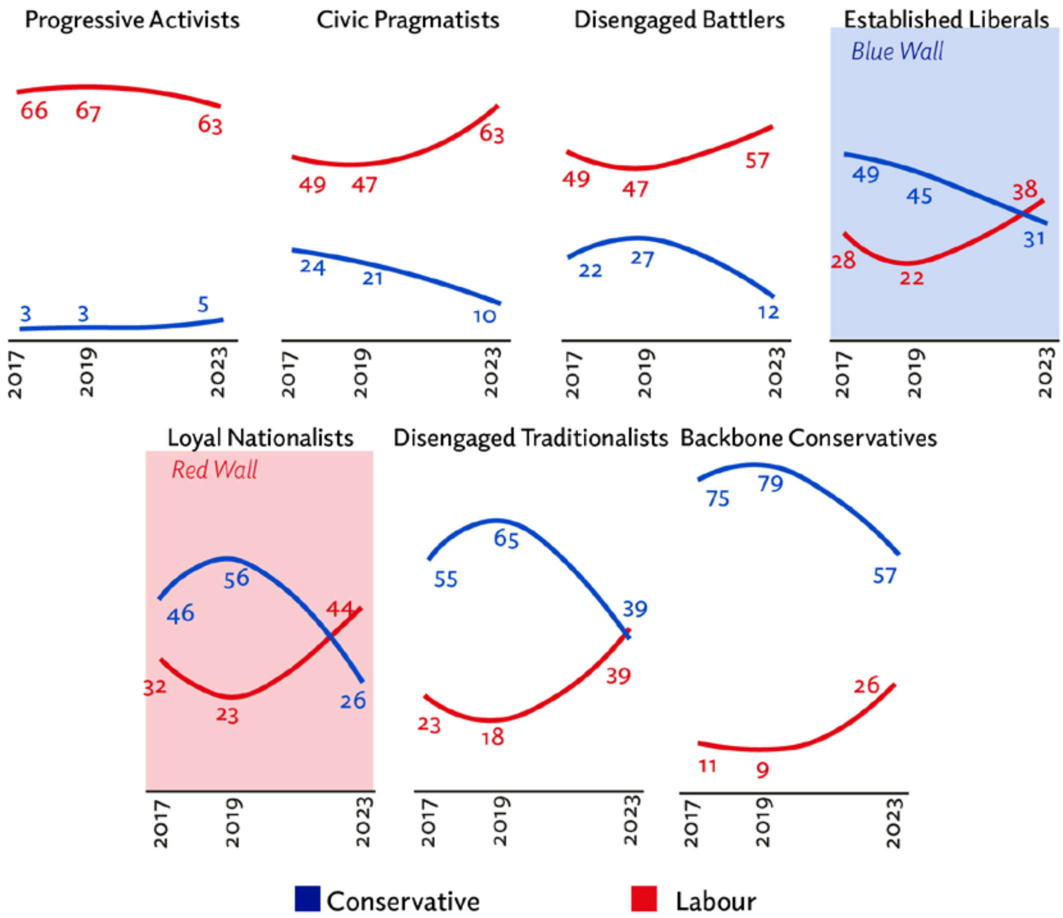
Geographies don't shift allegiance, people do. And voters with the same values as those in the Blue Wall (referred to as 'Established Liberals') are found across the country, albeit mainly in the South of England. By focusing on a group of voters as opposed to seats, we are better able to identify what motivates them, and how they may vote in the next general election.

Blue Wall voters exhibit a strong sense of security. More than any other segment of society, they feel secure and safe in where they live: 82% disagree that their local area is becoming more dangerous, compared to 56% for the UK as a whole. And Established Liberals are the least likely of any segment to say that their area has been neglected over time.

Coupled with this is a higher-than-average optimism about the state of the UK. While 58% of the public think that 'nothing in Britain works anymore', that falls to 35% among Established Liberals. They also express a level of optimism that things will get better in the future that is 11 points higher than the national average (30%).

These sentiments are foundational in how Established Liberals think about a range of issues. Higher rates of security and optimism make them more trusting of our institutions, and less likely to see the need for a radical overhaul. It also makes Established Liberals more optimistic about technological change.

Change in voting intention, from the general election of 2017 to Autumn 2023



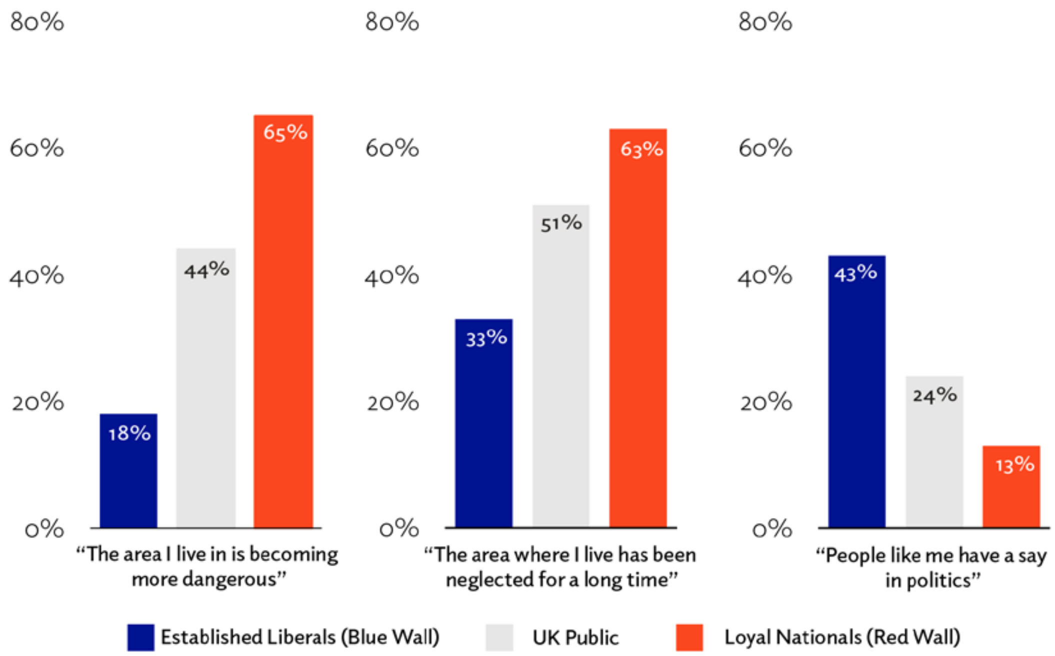
Source: More in Common, 2023

Blue Wall voters tend to hold socially liberal views and believe in international co-operation. However, unlike other progressive groups, they think that people are responsible for their own outcomes in life, support free markets and believe that success can be achieved through hard work.

Given this, it is unsurprising that their beliefs on specific issues don't fit neatly within either the Conservative or Labour party. Established Liberals are aligned with the most progressive segments of the population on immigration: their low threat-perception means they are less animated by anti-immigrant narratives than other conservative groups. But on other issues, such as private schools or the size of the state, they are much more closely aligned with the Conservatives.

Blue Wall voters feel safer, secure and better heard by Westminster than the wider public

Percentage of voters agreeing with the following statements:

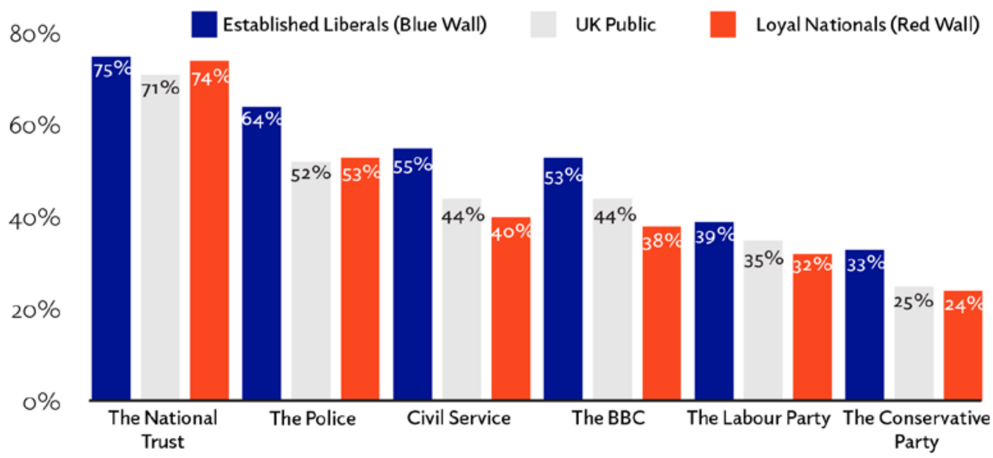


Source: More in Common, 2023

Established Liberals rank housing, jobs, and the war in Ukraine higher in importance than the public as a whole. And they are less concerned about immigration and crime. That said, on the biggest issues of concern, Blue Wall voters' feelings are mostly the same as the wider UK. Given their relative comfort, Established Liberals are less likely to choose cost of living as a top issue than the rest of the country (68% vs 76%), but it is still their biggest issue of concern, followed by the NHS. These issues that are also ranked first and second among every other segment in the UK.

Blue Wall voters are more trusting in national institutions than the public as a whole

Do you trust the following institutions in Britain today?



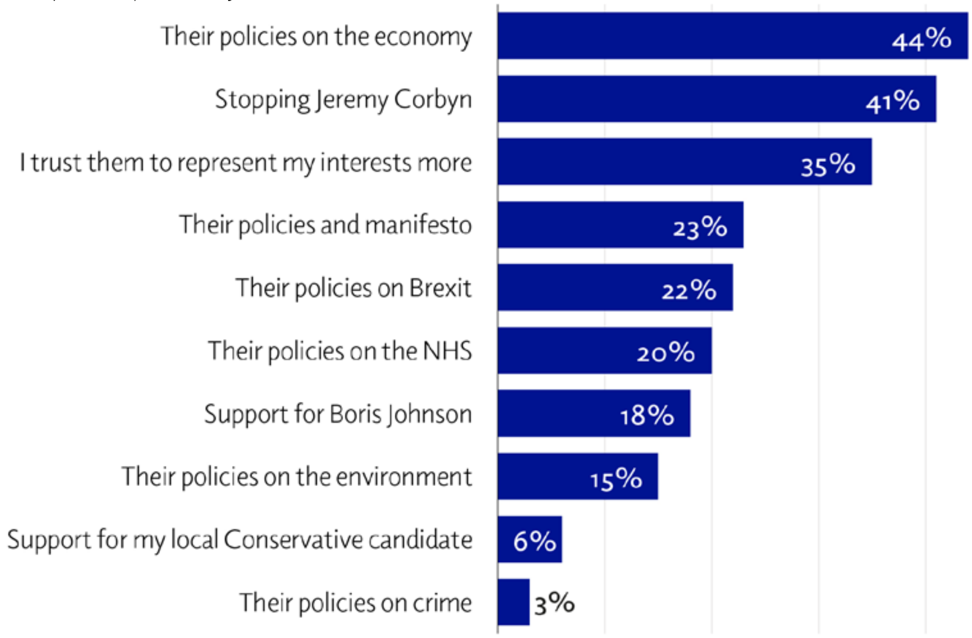
Source: More in Common, 2023

Blue Wall voters did not warm to Boris Johnson, or his style of rhetoric, particularly on Brexit. Yet with Johnson gone and Brexit of lower salience, Sunak has an opportunity to keep hold of these voters. Polling shows he is certainly more appealing to Established Liberals than Johnson was. 51% say Sunak has performed better than Johnson (compared to 36% of the public), and only 11% say he has performed worse. Established Liberals are also significantly more likely than average to say they trust Rishi Sunak over Keir Starmer or say that Sunak has the public's interests at heart - beliefs not shared by the UK public as a whole.

Blue Wall voters opted for the Conservatives in 2019 because of the party's economic policies and their opposition to Corbyn

UK IN A CHANGING EUROPE

You said you voted for the Conservatives in 2019. Thinking back, what were the most important factors in your decision to vote Conservative?



Source: More in Common, 2023

Yet aversion towards then Labour Leader Jeremy Corbyn was one of the key reasons Established Liberals gave for staying in the Conservative fold in 2019. In his absence, Sunak has a more difficult task. This is particularly true because those attributes which make Sunak attractive to Established Liberals are shared by Starmer. Whilst a third of Established Liberals describe Sunak as an asset to the Conservative Party, the same proportion describe Keir Starmer as an asset to Labour.

In fact, Established Liberals tend to see more similarities than differences between Keir Starmer and Rishi Sunak. This arguably means that the characters of the individual party leaders are unlikely to play a role in shaping who they support at the next general election.

Jeremy Corbyn's absence may mean more Blue Wall voters feel able to vote for other parties this time around. Indeed, Established Liberals are the group most likely to say they will now vote Liberal Democrat. Beyond that, one fifth of Established Liberal voters who voted Conservative in 2019 now say that they don't know who they will vote for in the next general election.

Established Liberals are also unlikely to see who they vote for as a key part of their identity. Though 36% consider themselves a supporter of the Conservative Party, most describe themselves as 'not very strong' supporters. This makes them less partisan than other groups - and more likely to decide their vote on which party's record and prospectus most appeals to them.

With so many former Conservative votes to play for, and demographics working against the Tories, significant movements in the Blue Wall should not come as a surprise at the next election.

ECONOMIC INSECURITY

Professor Jane Green and Dr. Roosmarijn de Geus

Economic security is an invaluable lens for understanding political behaviour. It offers an insight into a range of factors that shape the extent to which people feel insulated from economic shocks and future challenges. Do they own their home? Can they pay the mortgage? Do they have savings to fall back on, a secure income, a reliable pension, a secure job? Are they healthy enough to remain economically active? If they are young, do they have the kind of training that will keep them employable? Do they have family who can help them, good long-term prospects, or more troubling times ahead? It is, in other words, about resilience. For many, these sources of resilience now feel depleted.

Economic security drives policy preferences over spending and is strongly associated with health outcomes, including mental health. It is no wonder, given current economic times, that we have seen increases in mental ill-health. But there hasn't been much focus on the link between economic insecurity and electoral behaviour - on vote choice. That is, we think, very likely because questions on this theme haven't often been asked in relevant surveys.

Economic security tells us much more about a person's economic well-being than income, social class, or home ownership, which are associated with feelings of economic security, but do not tell the whole story. These factors do not capture people's subjective feelings about their financial condition, nor do they encapsulate all the objective circumstances that make someone secure.

The British Election Study (BES) in 2018 and 2022 onwards asked: *How worried are you about your and your family's economic security*? The BES also asked a range of questions about respondents' economic circumstances to understand what accounts for feelings of economic insecurity. With this data, we can analyse who felt most economically insecure, and the relationship between economic insecurity and vote intention for the 2019 general election. As 2018 was before the pandemic and the recent cost of living crisis, it is a useful baseline for assessing change between then and more recent economic times.

In 2018 we found that:

1. Working-age non-graduates felt more economically insecure than working-age graduates, but older people felt most economically secure, regardless of education level.
2. There was greater support for Leave (and the Conservatives), among the most economically secure.

3. When comparing motivations underlying vote choice, economic insecurity was as important as Brexit and immigration when opting for Labour over the Conservatives.

4. These relationships held across geographic economic outcomes.

These findings show that further increases in economic insecurity will likely be of great importance electorally. The nature of economic hardship has changed over time, shifting from concerns about inflation to worries about interest rates and mortgage rates. Thus, although economic insecurity clearly shapes electoral choice, the specific sections of the population that will be affected will differ depending on the exact nature of the financial pressure.

As we head towards the next general election, we can now compare the proportions of people who have become *more* economically insecure since May 2018, by comparing their answers in November 2022. Again, in 2022 we ask: How worried are you about your and your family's economic security?

Among these respondents, only 7% went from feeling insecure (more worried) to feeling secure (less worried). In comparison, 19% went from feeling *secure* to *insecure*, and almost half of respondents (49%) felt economically insecure in *both* waves. 25% remained more secure throughout.

Those who *became* insecure in the period from 2018-2022 were disproportionately younger, not university educated, and female. That is to say, the very same people who felt more insecure in 2018 were more likely to have fallen into economically insecurity by November2022.

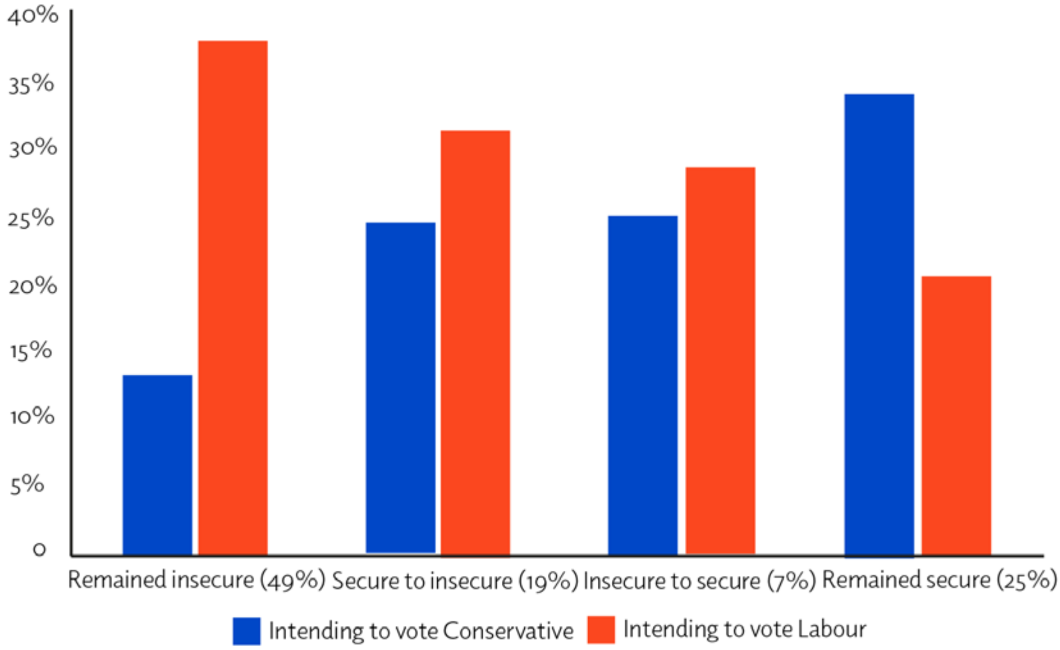
The chart below shows the shifts in economic insecurity over time and November 2022 vote intention, either for Labour or the Conservatives.

For those who remained economically insecure, Labour vote intention is almost 25 percentage points higher than for the Conservatives. For those who remained economically secure, Conservative vote intention is almost 14 percentage points higher than for Labour.

The pattern we found in 2018 thus remains very strong: economic insecurity is strongly correlated with party choice. Labour leads among those who were secure but became insecure between 2018-2022 (a six-percentage point lead) and, interestingly, also among those who were insecure but became secure (a three-percentage point lead) (by far the smallest group).

Economic security is strongly correlated with voting intention

Change between May 2018 and November 2022: Reported economic insecurity and Conservative-Labour vote intention



Source: British Election Study Internet Panel, 2018 and 2022

This increase in and persistence of economic insecurity is an important factor behind Labour's improving polling position. It is, however, not the only way the economy will matter. The Conservatives are no longer the most trusted party on the economy. That switch, from Conservative to Labour, took place in 2022, at the time of the Truss mini budget. You have to go back quite far in time to see other reversals of reputation: to the Global Financial Crisis in 2008 (Labour to Conservative), and before that the Exchange Rate Mechanism crisis in 1992 (from the Conservatives to Labour).

Previous research showed that these infrequent reputational changes tend to last until the next economic 'shock'. This too is bad news for the Conservatives. Similarly damaging is that the economy is a broad signal of a government's competence: voters' perceptions of how well governments deal with the economy tend to translate to ratings across the policy agenda. A major economic shock is the kind of event that will cut through partisanship, leading to vote switching.

For voters, it is moments like this when a government's competence and a person's own economic considerations become significantly more important determinants of vote choice. This all suggests that economic security will be of even greater importance in the next election. It will be the party who promises greater security, and who is more trusted to deliver it, that benefits the most at the ballot box.

EDUCATION

Professor Rob Ford

Elections divide the British public along many fronts. What we do, how much we earn, whether we own or rent our homes, our gender, our generation, our ethnic background – all of these tend to pull us into one political camp or another. And, in recent elections, a new factor has joined this list – education. University graduates now align with the left, and school leavers align with the right.

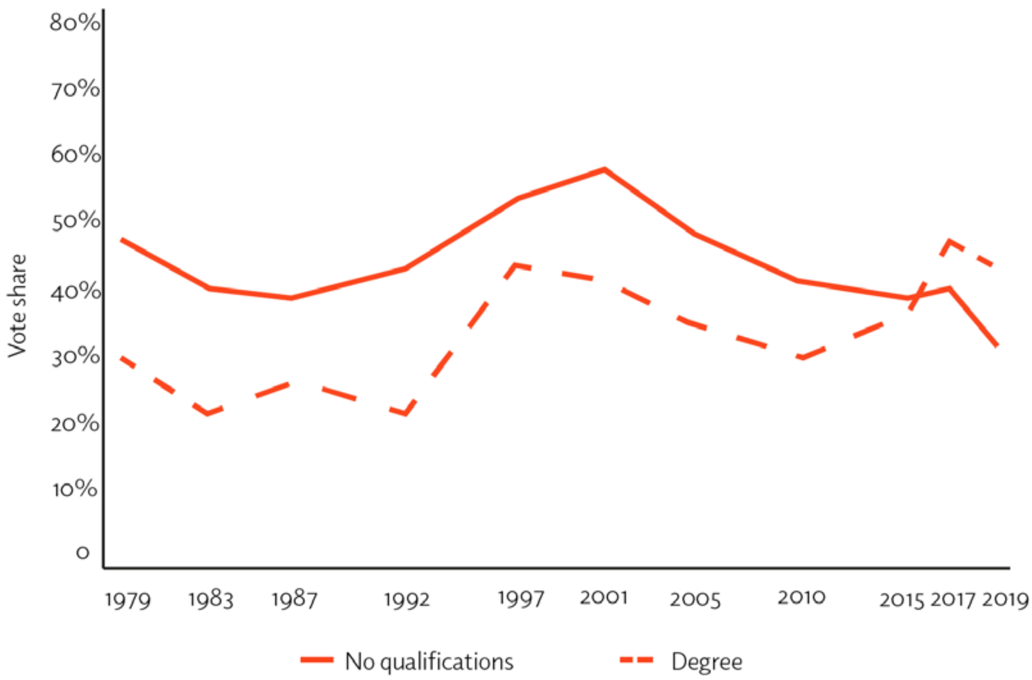
This education divide is unusual. Typically, when voters divide on economic grounds, the better off group sides with the right, while the struggling one backs the left. With education it is the opposite. Graduates, who are more likely to have high incomes, professional jobs, and own their own homes, lean towards Labour and other parties of the left. Those who leave school at the first opportunity, with few or no qualifications to their name typically have lower incomes and less secure work, yet they now line up with the Conservatives, usually the party of the better off.

This unusual pattern is also quite new. As the chart below illustrates, up to 2015, education followed the same pattern as other economic divides – school leavers leaned left, and graduates leaned a little right. But in the last two elections, this pattern has sharply reversed. It seems something happened after 2015 to change the relationship between education and vote choice.

Labour's vote share among graduates has increased in recent general elections

UK IN A CHANGING EUROPE

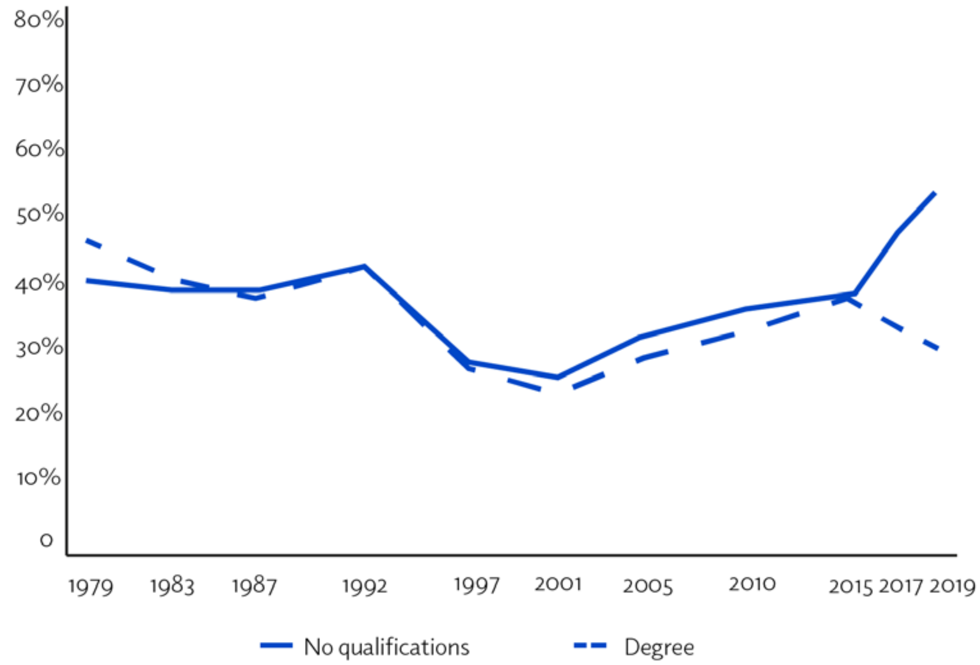
The education divide in Labour support, 1979-2019



Source: Analyses of British Election Study data in Ford et al (2021), 'The British General Election of 2019'

Those with no educational qualifications have tended to vote Conservative in recent general elections

The education divide in Conservative support, 1979-2019



Source: Analyses of British Election Study data in Ford et al (2021), 'The British General Election of 2019'

That 'something' was the EU referendum. Education was a very strong predictor of vote choice in 2016 and remains a strong predictor of the 'Leave' and 'Remain' tribal allegiances forged in that campaign. Graduates are strongly Remain and school leavers are strongly Leave. The growing link between Brexit tribe and vote choice helps to explain the new education divide – the Conservatives are the party of Leave and hence attract pro-Brexit school Leavers, Labour and other parties of the left are seen as more Remain, and so have attracted Remainer graduates.

But while Brexit has mobilised education divides into politics, it is not their only source. Education strongly predicts how voters see themselves and what they value – the basic building blocks of political choice. It is these identities and values which in turn inform both Brexit preferences and vote choices.

Graduates emphasise freedom and diversity and embrace change. School leavers favour order, continuity and stability, and find rapid change threatening and disorientating. These different views of the world have become important predictors of political preferences and vote choices over the past decade, displacing social class and the economic arguments associated with it.

The agenda today, however, looks dominated once again by 'bread and butter' economic arguments which would be familiar to pasts generations – worries about the cost of living, rents and mortgages, falling incomes, a stagnant economy and creaking public services. A return to traditional 'haves vs have-nots' arguments could snap voters back into their traditional class and economic alignments.

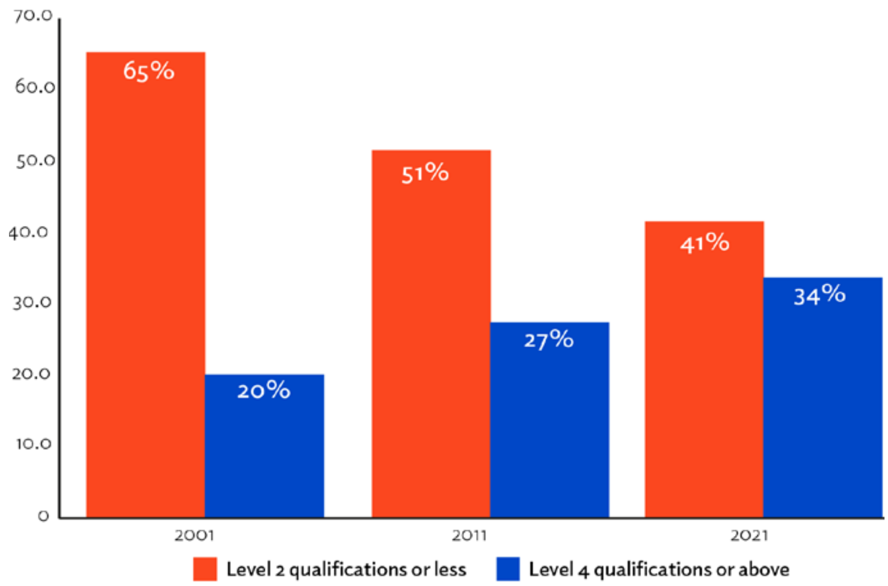
This is not quite what has happened so far. Rather, the tide has gone out for the Conservatives amongst nearly all groups, rich and poor, graduate and school leaver alike, leaving education divides intact even as the overall popularity of the parties' shifts. Labour support is still strongest among graduates, and the Tories still strongest among school leavers.

The electorate is thus still divided by education, even as everyone takes a dim view of the incumbent government's performance. And there are still several issues bubbling under the surface which divide voters strongly by education and the identities and values it predicts. For example, authoritarian school leavers are very exercised by the small boats crisis, while cosmopolitan, environmentalist graduates are the most anxious about climate change.

Voters are becoming increasingly likely to have attended university

UK IN A CHANGING EUROPE

Shares of England and Wales residents with level 2 qualifications (GCSEs) or less and with level 4 qualifications (university degree) or more



NB: Share of all 16+ residents (2011,2021); share of residents aged 16-74 (2001)

Source: Analyses of British Election Study data in Ford et al (2021), 'The British General Election of 2019'

The post-Brexit alignment of education and vote choices also has longer run implications for both parties. The mass expansion of higher education is slowly transforming the electorate, with the number of graduates growing every year while the school leaver electorate slowly declines.

Educational expansion also means education interacts with a second divide in British politics - age and generation. School leavers are the dominant group in the oldest cohorts, who went through the education system at a time when university was the preserve of a privileged elite. Graduates are the dominant group in the youngest cohorts, who have come of age since the advent of mass higher education. Educational differences between cohorts often increase already substantial generational divides in identity and values. The large generation gaps in educational experience make it certain that the share of graduates in the electorate will continue rising, and the share of school leavers will continue declining for years to come as new cohorts join the electorate and old cohorts fade away.

This means the electoral balance of power in the education divide is slowly but relentlessly changing. Future conflicts which divide graduates and school leavers will be different to those in even the recent past - graduates will have more electoral heft; school leavers will have less influence. This is already evident in the changing politics of immigration. Campaigns for migration control have less impact now in part because the core electorate attracted by such messages- older school leavers- is already much smaller.

The balance of electoral power on climate change is shifting in the opposite direction. The growing graduate electorate is more focussed on the climate crisis and more impatient for action, something reflected in rising support for the Greens in prosperous graduate-heavy areas in recent local elections. This may generate some electoral risks for the Conservatives' proposals to water down net zero conditions, which could alienate the graduate voters most focussed on climate issues, but without attracting much support from school leavers, who may be more climate sceptical in theory but may not give much attention to notional savings on car or boiler costs.

The changing calculus on immigration and climate highlight a broader issue for both parties. Over the past decade, elections have been won or lost among socially conservative school leavers, a group concentrated in places such as the 'Red Wall'. Winning them has been the route to electoral success for the Conservatives, losing them has cost Labour dearly. But demographic change makes it certain that future elections will not be fought on the same terrain. In particular, the battle for the hearts and minds of the rising graduate electorate will become ever more important in the contests to come.

SOCIAL VALUES

Dr Leonardo Carella and Edmund Kelly

Should the state ensure equality of means among members of society or let the market decide who gets more and who gets less? Should our society celebrate diversity and welcome alternative lifestyles, or strive for social cohesion and order?

Political scientists and sociologists think of people's fundamental views on questions like these, which tap into notions of what a 'good' society should look like, in terms of 'values'. Values are important because they serve as lenses through which people make sense of discrete political issues, even though they might not have poured over the details of a budget or studied carefully all the implications of EU membership.

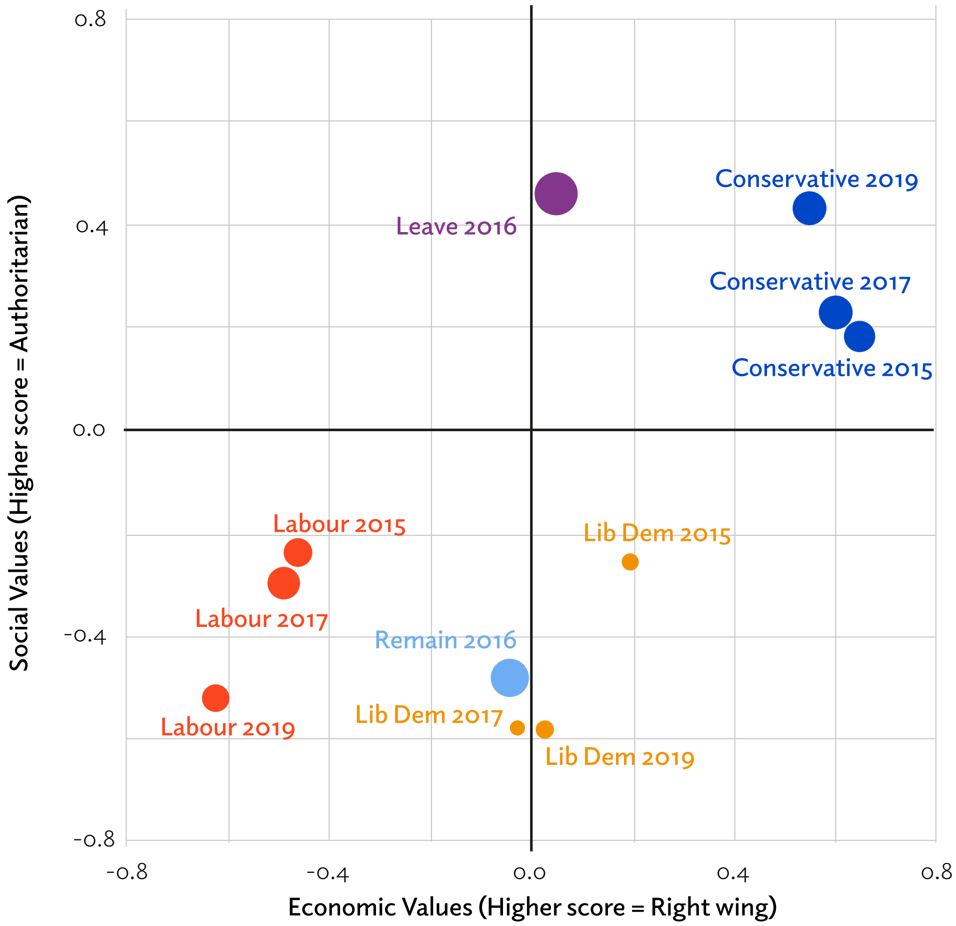
Researchers find it useful to simplify variation in values across the public into two dimensions. The first corresponds to economic values: the traditional distinction between those on the 'left' and those on the 'right', who disagree on the extent to which the state should be in the business of distributing resources equally. The second is *social values*, which distinguish between 'liberals' and 'authoritarians', who differ in the degree to which they think society should embrace outsiders.

Values are tricky to measure. Questions like 'how authoritarian are you?' make little sense, while questions like 'how left-wing or right-wing are you on a scale from 0 to 10?' will mean different things to different survey respondents. Fortunately, there is a battery of questions that has been used for decades in the UK to measure values. For economic values, these are questions on things like state ownership of public services, fairness of the economy, and the role of trade unions; for social values, these are questions on moral standards, acceptance of unconventional lifestyles, freedom of protest and punishment for criminals.

Once each respondent's answers to these questions are pooled together, these items give us a fine-grained picture of where voters are located in a two-dimensional value space, as below.

In 2016, Leavers and Remainers shared economic values, but were at polar opposites on social values

Average social and economic value scores for groups of voters in the EU referendum and the last three general elections



Source: British Election Study, Carella and Kelly 2023.

The story of the last decade has been one of *realignment* of the British electorate. While traditionally economic values were the main determinant of party choice in Britain, the 2016 EU referendum pushed social values into the foreground of electoral politics.

Simply put, the Brexit realignment is a story in two parts. First – because of its connections with questions of immigration, national identity and 'control' – the referendum divided British voters primarily over their social values. Second, as the 'Remain' and 'Leave' identities spawned by Brexit became tightly associated with the main parties and Brexit remained high on the agenda, authoritarian Leavers flocked away from Labour (and the Lib Dems) into the Conservative fold, while liberals abandoned the Conservatives for 'Remain' parties.

To tell this story visually, we drew on data from the British Election Study. The graph above shows the average scores for some groups of voters in the EU referendum and the last three general elections, with those with the national average score both on economic and social values in the middle of the plot, at the intersection of the two axes. The size of the point reflects the size of the group.

In 2015, Labour and Conservative voters were twice as far apart on economic values (the horizontal axis) than on social values (the vertical axis). The 2016 Referendum was an entirely different ball game: Remainers and Leavers were virtually identical on economic values, but polar opposites on social values.

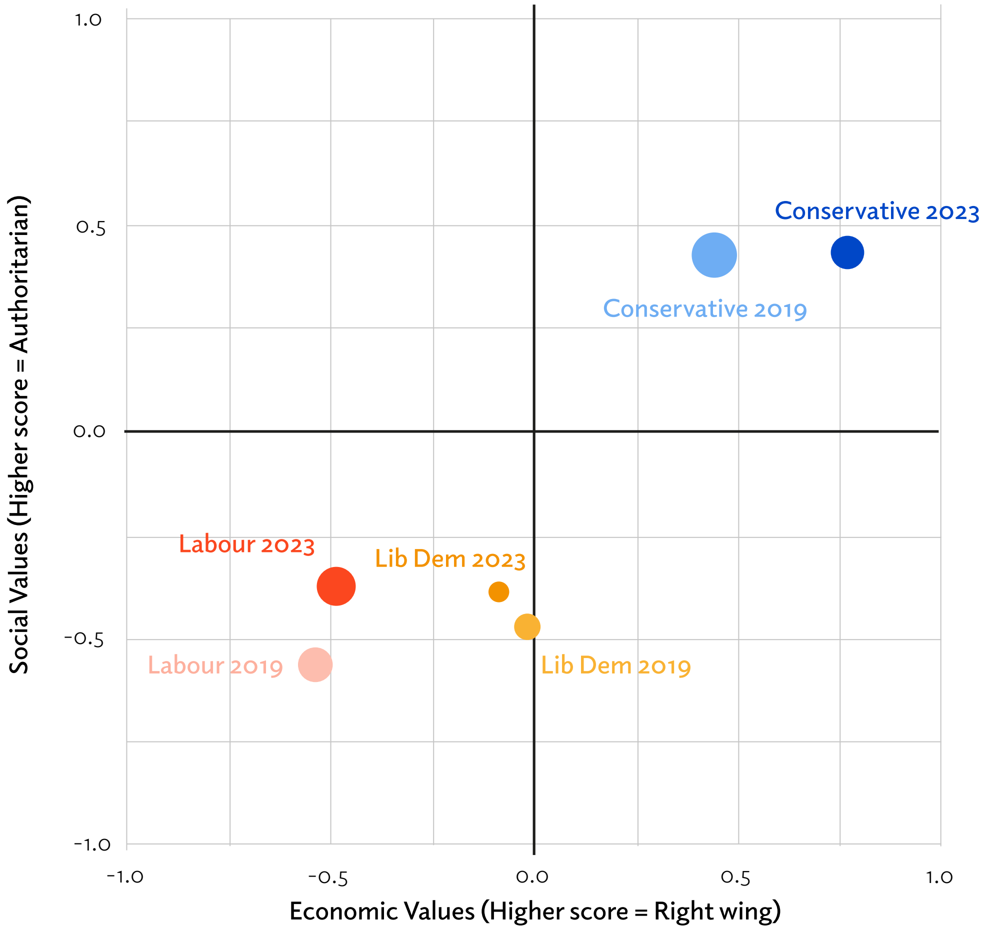
Brexit politics exerted a 'gravitational pull' on the positions of party electorates in the following elections: by 2019, voters had sorted themselves so heavily by Brexit vote that Labour and Conservatives were just as far apart on social values as on economic values. The Liberal Democrats also became a more distinctly liberal group.

The emergence of social values as a trait strongly associated with party choice did not do away with left-right politics (remember Jeremy Corbyn, anyone?). The two dimensions coexisted, putting before cross-pressured voters - the much commented-on left-authoritarians and the elusive right-liberals - the choice of which set of values to prioritise when voting.

Compared to 2019, Labour and Lib Dem voters have become less liberal. Conservative voters are just as authoritarian, and more economically right-wing

UK IN A CHANGING EUROPE

Average social and economic value scores for groups of voters, 2019-2023



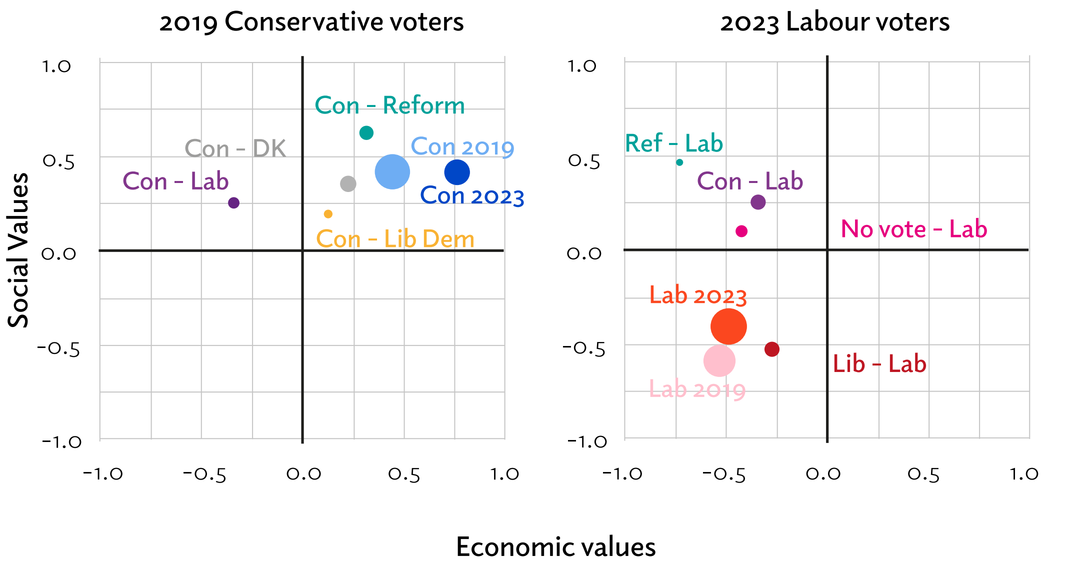
Source: British Election Study, Carella and Kelly 2023.

Yet much has changed from the last general election - four years and many Zoom calls ago. How have the value profiles of party supporters changed since then? The chart below shows that not a great deal has changed, as far as social values go. The realignment observed between 2015 and 2019 has clearly not continued: if anything, both Labour and LibDem electorates are somewhat less distinctly liberal than it was the case in 2019. Conservative voters are just as authoritarian as four years ago, and markedly more economically right-wing.

To make sense of this, look at the values of voters whose vote intention has changed since the last general election: those who left the Conservatives between 2019 and 2023, and Labour' new recruits over the same time period.

Undecided former Conservative voters are just as authoritarian as current Conservatives, but more moderate on economics

Average social and economic value scores for groups based on past vote and voting intention, 2019-2023



Source: British Election Study, Carella and Kelly 2023.

Since 2019, the Conservatives have neither been losing disproportionately liberal voters (as we would expect if realignment had continued), nor have they shed disproportionately authoritarian voters (as we would expect if realignment had reversed). Instead, they have been disproportionately losing voters *on the economic left*. Former Tory voters who are currently undecided or switched to Labour are just as authoritarian as Conservative loyalists. However, when it comes to economics, the undecided is distinctly more moderate than Tory supporters and the 'switchers' fit right in with Labour voters' economic values.

Conversely, Labour has been gaining disproportionately among authoritarian voters - particularly from the Conservatives and from former non-voters. This is reflected in the slight shift in the centre of gravity of Labour's electorate towards the centre.

Looking ahead at the next election, the 'Conservative to Don't Know' group looks like the juiciest prize for both parties. Rishi Sunak needs the votes of almost the entirety of these voters to stand a chance in the next election. So far, their high authoritarianism scores haven't managed to anchor them to the Conservatives' fold; but their centre-right economic values still keep them from joining Labour.

Our analysis points at a pause in the polarisation of the parties over social values, likely catalysed by the return of economic issues to the fore of the worries of British voters - and thus the return of economic values as an important interpretive lens of politics.

The Conservatives' 2019 coalition is fraying to their *economic* left - not specifically among authoritarians or liberals. To the extent that Labour is benefiting, this is resulting in a make-up of its electoral base that is much closer to the centre ground of UK politics than it had been the case in 2019.

But this is not a reversal of the Brexit realignment, when both Labour and the Conservatives became more distinct and homogenous in their social values. This is what happens when a party becomes much less popular - and its electoral appeal shrinks to its most ideologically distinctive base - and another becomes much more popular and its electorate broader.

CLASS AND SOCIOECONOMIC STATUS

Professor Geoff Evans and Matthew Blayney

Over many decades, the primary division in British politics was between working class support for Labour and middle-class support for the Conservatives. The source of this opposition was, to a considerable degree, differing views on economic matters: inequality, hardship, strikes, unemployment, and redistribution provided the axes along which the main classes and main parties were divided. However, after Tony Blair's re-branded 'New Labour' consciously shifted towards the centre and widened its appeal beyond the traditional working class, this cleavage was greatly weakened.

The years immediately following the 2016 'Brexit' referendum saw this decline accentuated. By the 2019 election, there was a reversal in the traditional pattern of class voting exemplified by the breaching of 'red wall' traditionally Labour seats across the North and Midlands by the Conservatives.

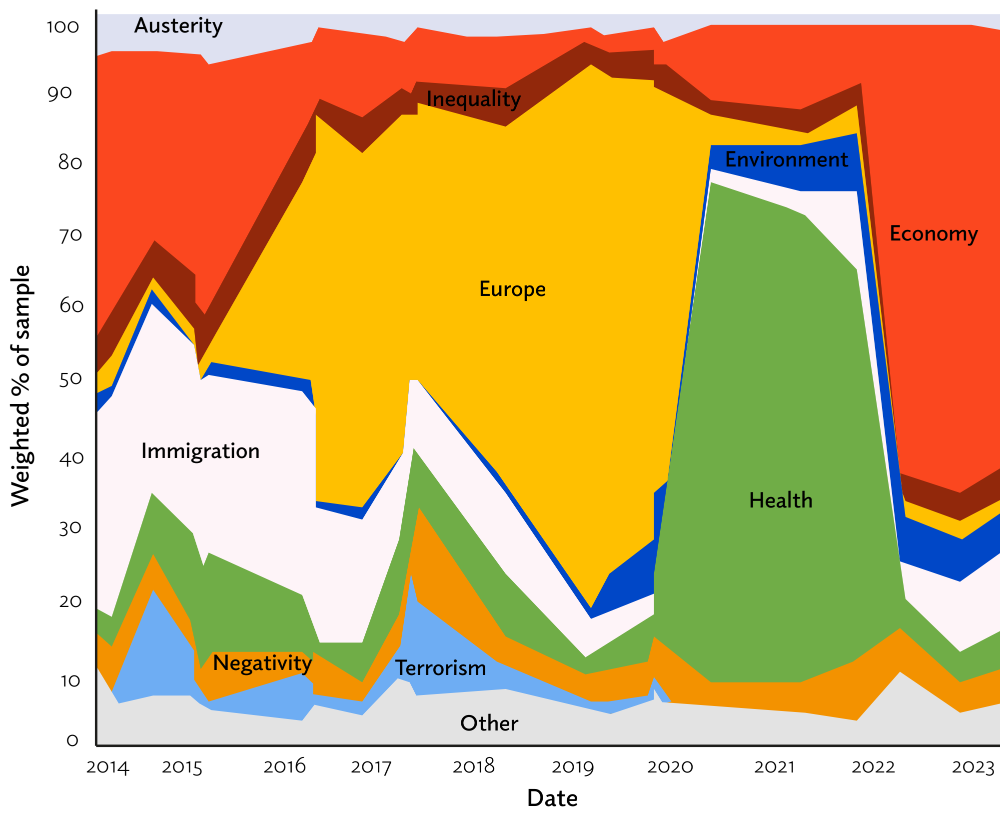
Brexit was the dominant issue in the post-referendum era, and was central to the re-shaping of class voting that took place then. Since the completion of the UK's exit from the European Union and the end of the COVID-19 pandemic, however, the economy has once more become *the* major political concern: the cost-of-living crisis is now the public's priority.

This resurgence leaves the potential for a return to traditional economic class voting, with working class 2019 Conservative voters potentially swinging back to Labour. The chart below examines this idea by showing the percentage-point Conservative lead in four occupational classes in 2015, 2019 and 2023; a middle class consisting of managerial and professional occupations (46.7% of the sample), an intermediate class of routine white-collar workers (22.5%), a class of small business owners and the self-employed (6.4%), and a working class of routine and semi-routine workers, including lower supervisory and technical occupations (24.5%).

There was an inversion of the pattern of class voting between 2015 and 2019. The working class switched from Labour to Conservative. Indeed, the Conservatives' lead in 2019 among the working class was larger than that for all others except for the relatively small number of self-employed workers, who have always provided the core of their support.

The economy and the cost of living crisis are now considered to be the most important issues facing the country by the public

Most Important Issue over time

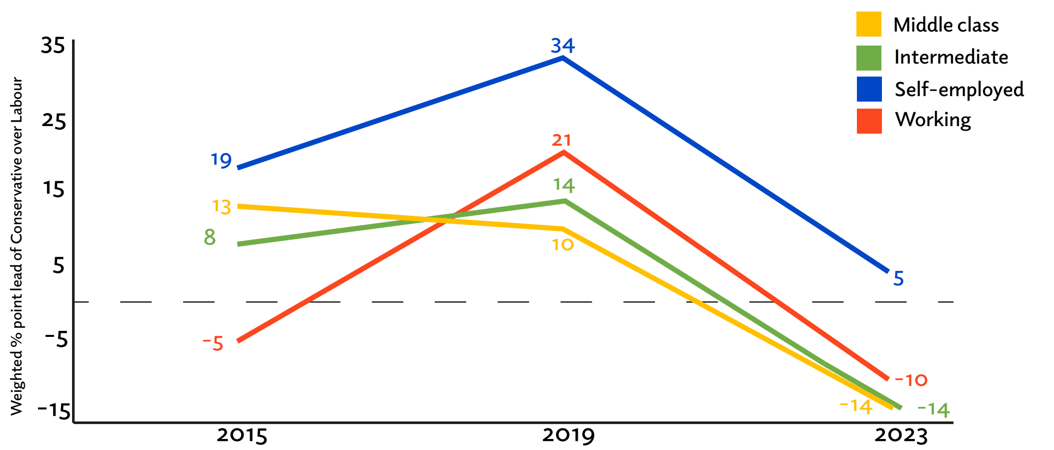


Source: BES Internet Panel Surveys , 2015-2023

Yet by 2023, whilst Labour's popularity relative to the Conservatives has increased substantially among all classes, the realignment observed in 2019 has not been fully reversed. Other than the self-employed, in 2023 the working class is still - albeit with a reduced margin - the *least* likely to support Labour.

Between 2015 and 2019, there was an inversion in typical patterns of class voting

Percentage-point lead of Conservatives within classes, 2015-2023



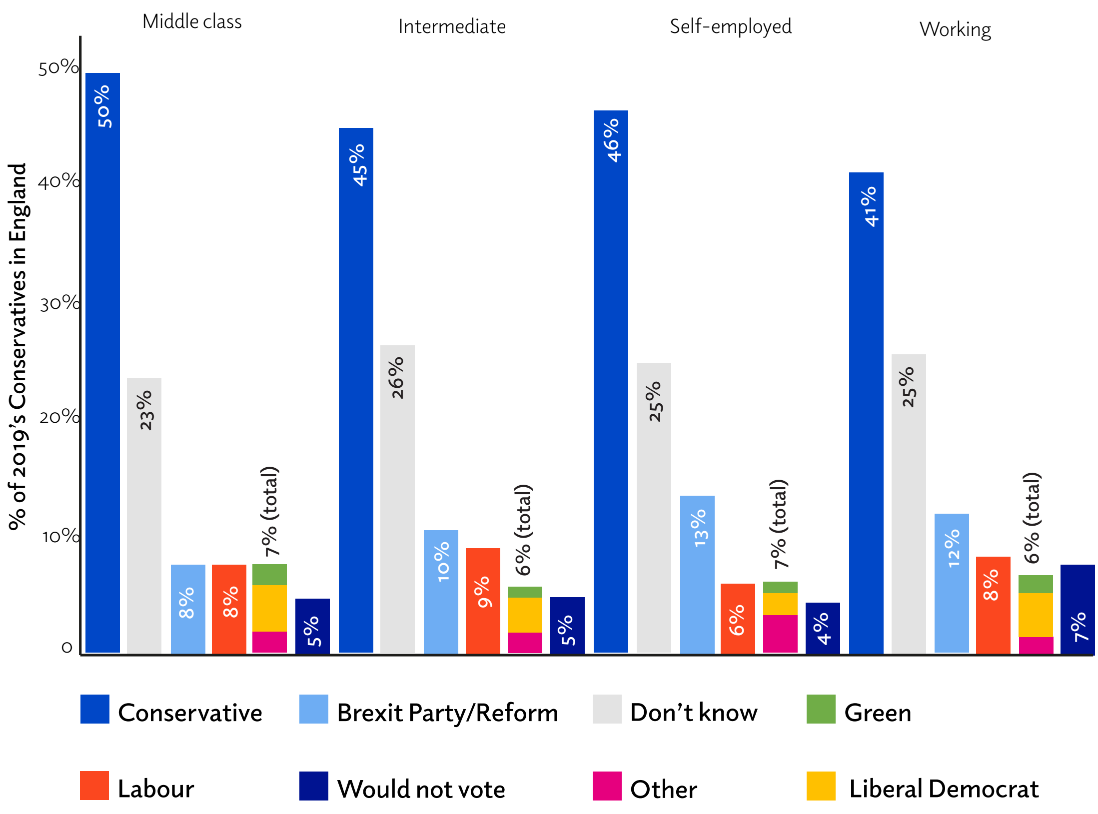
Source: BES Internet Panel data., 2015-2023.

This is not, however, down to a simple switch from Labour to the Conservatives among the working classes. Instead, most change in party support since 2019 has resulted from people switching away from the Conservatives. The following chart uses BES panel data to track the 2023 voting intentions of people who voted Conservative in 2019 in the four classes discussed. It shows that the Conservatives have retained more of their middle-class supporters than those in other classes, particularly the working class. Yet it also shows that of those who no longer support the Conservatives, Reform UK is a clearly more popular choice than Labour amongst both self-employed and working classes. Not only are the working class 50% more likely to switch to Reform than Labour, they are more likely than other classes to intend not to vote at all, echoing the trend towards higher rates of working class abstention identified in previous [years](#).

Working class voters who supported the Conservatives in 2019 but no longer are more likely to have switched to Reform UK than Labour

UK IN A CHANGING EUROPE

The 'new' voting intentions of 2019 Conservative voters



Source: BES panel data, 2019-2023.

In spite of the resurgence of the economy as the most important issue for voters, we have not seen a return to the traditional pattern of class voting. The Conservatives have lost their lead not only among the working class, but also among the other main classes. Similarly, while Labour has regained its lead among the working class, their lead here is the smallest (with the exception as noted above, of the small self-employed class). Most of the working class who have defected from the Conservatives since 2019 have *not* gone to Labour. Tellingly, 64% of those 2019 working class Conservative voters who switched to Reform said immigration is the most important issue facing the country in 2023, compared to only 9% in the general population (and only 30% of 2019 working class Conservatives as a whole).

Despite the lack of a shift back to traditional 'class based' voting patterns, based on current voting intentions, significant loss of Conservative support among the working class means much of the 'red wall' looks set to return to Labour. Of the 31 Northern and Midlands 'red wall' seats which flipped from Labour to Conservative between 2015 and 2019, only three still maintain a Conservative lead in 2023 BES panel data.

There is not, however, a return to pre-2015 levels of Labour support. For the relatively more working class Northern and Midlands 'red wall' seats, this would suggest that, though Labour may win seats back at the next election due to their surge in popularity nationally, they will continue to be tightly contested in future elections. The high level of 'don't knows' recorded among 2019 Conservative voters leaves open the possibility that the Conservatives might recapture the votes of a substantial proportion of their 'lost' electorate.

Given that voters clearly care about the economy and living costs, the failure of the classes to realign along a more traditional left-right axis may well reflect the inability of either of the main parties to successfully present strong policy platforms on economic issues and, in particular, for Labour to present a convincing economic programme to working class voters. Additionally, the higher rates of defection from the Conservatives to Reform among the working class and self-employed suggest immigration and related matters still matter for some. The difficulty for the Conservatives here would appear to be one of not being effective enough in dealing with these concerns leading to them to be outflanked on the right.

BREXIT

PARTIES AND THEIR BREXIT POLICIES

Professor Anand Menon and Sophie Stowers

What a difference an electoral cycle makes. Four years ago, Brexit completely dominated the campaign in what Sky controversially dubbed the 'Brexit election'. Now, in the runup to the next general election, none of the major national parties seem remotely interested in talking about it.

Boris Johnson successfully weaponised the issue of relations with the EU in 2019, and his pledge to "Get Brexit Done" helped him secure a parliamentary majority. His successors, however, have proven less able to use the issue, and for several reasons.

In the first place, as the cost-of-living crisis has bitten, the public's priorities have shifted. What is more, voters increasingly think there is a link between Brexit and our economic difficulties. Findings from our recent analysis of what Leave voters think showed not only that a mere 18% them think Brexit is going well, but also that a quarter now believe the UK economy has weakened since 2016. Crucially, 51% of Leave voters cite the ineffect-iveness of UK politicians as the reason why Brexit has not gone as well as it could have.

These are hardly propitious conditions for the Government to sell Brexit as a success. What is more, as the economy has taken centre stage, Rishi Sunak's focus on calming markets and restoring economic credibility has led him to take a number of decisions - from signing the Windsor Framework with the EU, to watering down the Retained EU Law Bill, to delaying the introduction of new checks at the UK border - that have irritated some Brexiters on his own side. Focussing on the issue might merely stoke intra-party squabbles that he could do without. If the Government has good reason not to talk about Brexit why, then, is the Labour Party also reluctant to do so? Admittedly, Keir Starmer has recently stressed his desire to seek a closer trading relationship with the EU. That being said, in ruling out Single Market and customs union membership, what Labour is proposing amounts largely to some tinkering with the existing Trade and Cooperation rather than a more ambitious overhaul.

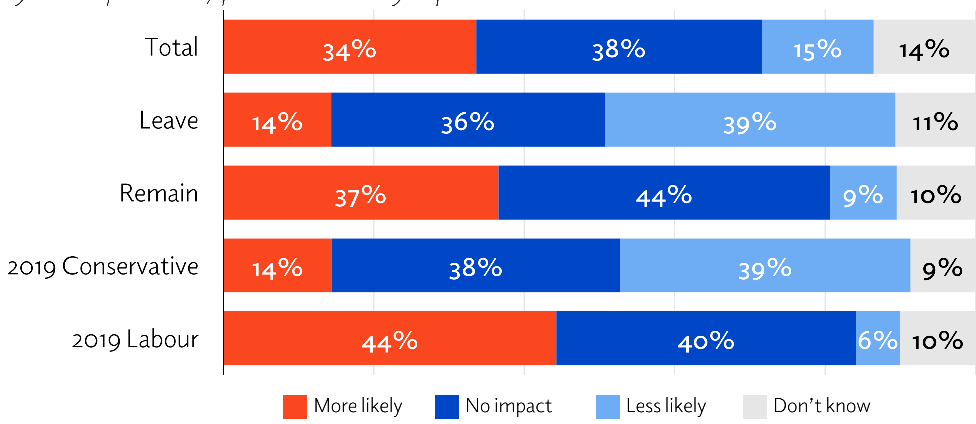
Furthermore, the Labour leadership seems to have calculated that relative timidity on Brexit is electorally wise given the need to attract Leave voters in those 'red wall' seats they lost in 2019. Polling provides some support for this approach. A Labour proposal to renegotiate the existing Brexit deal would make a fifth of voters (20%) less likely to vote for the party. 32% of those thinking of switching party after voting Conservative in 2019 say they would be less likely to vote Labour if the party proposed renegotiating the Brexit deal.

Our results in fact indicate that a pro-EU stance would increase merely support among those who already look sure to support Labour at the next election (for example, 60% of those who would be more likely to support Labour if they proposed a second referendum already intend to vote Labour at the next election). However, it might alienate a significant proportion of those yet to be convinced to vote for the Party.

Most voters say that Labour proposing to renegotiate the Brexit deal would not impact their likelihood of voting for the party

Imagine at the next general election, Keir Starmer proposes renegotiating the Brexit deal. Please indicate whether this pledge would make you more or less likely to vote for Labour, if it would have any impact at all.

UK IN A CHANGING EUROPE



Source: Public First for UK in a Changing Europe, 2023.

Recent electoral experience also tends to support a cautious approach. Not only has the party enjoyed a significant lead over the Conservatives since early 2021, but Labour secured an increase in vote share in leave-voting wards in the 2023 local elections.

What, then of the Lib Dems? As Rachel Wolf put it at a recent UKICE event, election campaigns are frequently designed in contradistinction to the one that went before. There is a sense that the party is reacting to its disappointing performance in 2019, when it focussed squarely on Brexit. It is still Liberal Democrat policy to undertake a gradual rapprochement with the EU, culminating in re-joining the Single Market. But it is difficult to get Lib Dem politicians to actually discuss this policy.

John Curtice has argued that the party is 'losing votes to Labour' because of its reluctance to talk about Brexit. Yet the preferred approach of party officials seems to be that Brexit should be downplayed, not least given their ambitions to target dissatisfied Conservatives in the South of England. These seats may have voted slightly more for Remain than the national average, but not dramatically so. Party higher-ups will be keen to appeal across the Brexit divide to maximise their chances and avoid advertising their ultra-Remain electoral history.

Despite the lack of political appetite for more discussions of Brexit, the public remains strongly attached to how they voted in 2016. As Sara Hobolt and James Tilley show, 'Brexit identities' still resonate with many voters and colour their political views. But strong views on an issue is one thing. Brexit's salience compared to other issues is quite another.

Brexit no longer figures among the top ten issues identified by the public as national priorities Even among the most ardent Leavers and Remainers, there is a desire to simply talk about something else, with the issue of UK-EU relationship lagging behind the economy, the NHS and immigration. Perhaps, then, the big risk for parties in talking about Brexit is that it would simply make them seem out of touch with the prioritises of many voters?

Among voters and parties, the dominant feeling towards Brexit seems to be ambivalence. There are simply more important things to think about. Sure, for many, things have not gone quite as well as planned. But as we head towards the next election, many of these voters don't particularly want to hear about how either party can 'make Brexit work' either.

BREXIT AND THE ECONOMY

Professor John Curtice

Voters' perceptions of the economic consequences of Brexit were strongly related to how they voted in 2016. According to the British Election Study, 93% of those who thought the economy would be worse as a result of Brexit voted Remain. In contrast, 90% of those who reckoned the economy would be better, backed Leave - as did 69% of those who reckoned it would not make much difference either way.

We might therefore anticipate that perceptions of how Brexit has worked out in practice might have had an impact on people's attitudes now towards being inside or outside the EU.

Table 1 shows how voters have evaluated the economic consequences of Brexit since the UK voted to leave the EU. Even before the referendum, voters were somewhat more likely to say the economy would be worse off (39%) than felt it would be better off (29%), though many (29%) felt Brexit would not make much difference. However, thereafter public opinion gradually became more pessimistic, most notably after the June 2017 general election, and again in 2019 when Brexit became stuck in the House of Commons. Still, once Brexit was delivered in January 2020, the public mood became less pessimistic once more.

The position now is markedly different. Whereas in the summer of 2021, 52% thought the economy would be worse off, two surveys this year have both found that between three-quarters and four-fifths now believe that Britain's economy is worse off as a result of Brexit. Conversely, at 5-6%, the proportion who now say that the economy is better off is well down on the 23% who previously felt that would be the case.

Much happened during the gap in our readings between the summer of 2021 and the beginning of 2023, including the downfall of two Prime Ministers. We might ask, then, when during this period the increased pessimism set in. Meanwhile, the most recent survey asked about what impact people felt Brexit *was* having rather than, as hitherto, what impact they thought it *would* have, and we might be concerned that this accounts for the change in the pattern of response.

Table 2 enables us to address these two issues. It is based on the answers that Opinium obtained when, between October 2021 and the end of 2022, they repeatedly asked the same question about the economic consequences of Brexit. It confirms that, by December 2022, the balance of opinion was more critical than it had been twelve months earlier. As many as 60% said that Brexit was having a bad impact, up from 50% at the beginning of October 2021.

The mood became especially negative during the last three months of 2022. That, of course, was after the premiership of Liz Truss, when the reaction of the financial markets to her 'fiscal event' undermined public confidence in the government's ability to handle the economy. It seems this may also have raised doubts about the economic consequences of Brexit.

The public has become more pessimistic about the UK economy

Table 1: Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – August 2023

Expect Brexit to mean economy will be (%):

	2016		2017			2018	2019				2020		2021		2023	
	June	Sep	Feb	July	Oct	June	Feb	March	Sep	Nov /Dec	Feb	July	Jan	Aug	Jan	Aug
Better off	29	30	29	24	25	25	19	19	20	21	26	21	25	23	6	5
Not much difference	29	30	29	25	25	19	19		23	22	22	28	22	24	15	19
Worse off	29	30	29	25	25	19	19		55	56	50	49	53	52	79	76
Net	-10	-15	-17	-25	-27	-26	-39	-37	-35	-35	-24	-28	-28	-29	-73	-71

Table 2: Perceptions of the impact of Brexit on the economy, October 2021 – December 2022

Whether Brexit is having generally a good or bad impact on the economy as a whole (%):

	2021				2022				
	01 October	15 October	29 October	23 December	25 March	10 June	21 October	18 November	02 December
Good	20	19	25	21	16	17	12	10	9
Bad	26	26	25	28	26	25	24	25	21
Neither	50	51	44	43	50	51	55	54	60
Net	***-30***	***-32***	***-19***	***-22***	***-34***	***-34***	***-37***	***-44***	***-51***

Source: National Centre for Social Research random probability mixed model panel (Table 1) and Opinium (Table 2)

But does this change of mood reflect increased doubts among Leave voters about the economics of Brexit? Or is it perhaps, no more than the result of increased scepticism among those who voted Remain? **Tables 3 and 4** below examines this question by showing the evolution of attitudes among Remain and Leave voters separately.

Remainers have been consistently pessimistic about the economic impact of Brexit, whereas the shift in Leave voters has been more recent

UK IN A CHANGING EUROPE

*Table 3: **Remain voters'** Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – August 2023*

Expect Brexit to mean economy will be (%):

	2016		2017			2018	2019				2020		2021		2023	
	June	Sep	Feb	July	Oct	June	Feb	March	Sep	Nov/Dec	Feb	July	Jan	Aug	Jan	Aug
Better off	8	5	7	6	6	4	4	4	4	5	6	4	6	7	1	1
Not much difference	22	15	13	14	11	15	12	13	11	11	14	16	11	17	4	8
Worse off	69	79	78	79	81	80	83	82	84	84	79	80	83	75	95	91
Net	*-57*	*-74*	*-71*	*-73*	*-75*	*-76*	*-79*	*-78*	*-80*	*-79*	*-73*	*-76*	*-77*	*-68*	*-94*	*-90*

*Table 4: **Leave voters'** Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – August*

Expect Brexit to mean economy will be (%):

	2016		2017			2018	2019				2020		2021		2023	
	June	Sep	Feb	July	Oct	June	Feb	March	Sep	Nov/Dec	Feb	July	Jan	Aug	Jan	Aug
Better off	54	58	54	46	45	51	41	39	40	46	56	46	51	53	13	13
Not much difference	35	32	30	35	34	30	32	34	35	32	29	36	28	28	34	35
Worse off	8	9	15	18	21	17	25	26	24	21	15	18	20	18	52	52
Net	*+46*	*+49*	*+39*	*+28*	*+24*	*+34*	*+16*	*+13*	*+16*	*+25*	*+41*	*+28*	*+31*	*+35*	*-39*	*-39*

Source: National Centre for Social Research random probability mixed mode panel. NB: for June 2016, Remain and Leave are defined by respondents' vote intentions.

Two key points emerge. First, the views of those who voted Leave have proven more variable over time than those who backed Remain. The balance of opinion among Remain voters has been consistently pessimistic, with typically around four in five saying that the economy will be worse as a result of Brexit. In contrast, while, until our most recent surveys at least, Leave voters have always been likely to say that they expect the economy to be better as a result of Brexit than worse, the balance of opinion became less strongly tilted in that direction in 2019, only then to return to more or less its previous level once Brexit had been delivered. So, despite the short-term volatility, over the longer term, the faith of Leave voters in the economic consequences of Brexit returned to where it had been in 2016.

However, that is no longer the case. Whereas in the summer of 2021 just over half (53%) of Leave voters said the economy would be better off as a result of Brexit, this year just over half (52%) were of the view that the economy is worse off. At the same time, the already heavily pessimistic outlook among Remain voters has now become an almost complete consensus.

But what impact, if any, has this pessimism had on the attitudes of Leave voters towards being inside the EU? After all, over the course of the last year a running average of the polls has consistently suggested that around 58% would now vote to re-join the EU, while only 42% would vote to stay out - a ten-point swing since 2016.

Leave voters who think the economy is worse off as a result of Brexit are more likely than other Leavers to say they would now vote to rejoin the EU

UK IN A CHANGING EUROPE

*Table 5: Current Brexit Preference of **2016 Leave Voters** by Evaluation of Impact of Brexit on the Economy*

Perception of Economy(%):

	NatCen Panel August 2023		Redfield & Wilton October 2023	
	Better Off/Not Much Difference	Worse off	Stronger/Similar	Weaker
Rejoin	5	44	13	42
Stay out	84	42	80	49

Source: NatCen August 2023 and Redfield and Wilton for UK in a Changing Europe October 2023

Table 5 indicates that, according to two separate sources, those 2016 Leave voters who think the economy is worse off as a result of Brexit are much less likely than those who are less pessimistic to say they would vote to stay out.

Between them, these two readings suggest that those 2016 Leave voters who reckon that Brexit is proving to be economically damaging are more or less evenly divided between those who would still vote to stay out and those who would now back re-join. In contrast, very few of those Leave supporters who are more optimistic about the economic consequences of leaving the EU have changed their minds.

Leave voters were never strongly convinced that Brexit would deliver an economic benefit. Even in 2016 only just over half reckoned Britain's economy would be better off, and the figure never rose much thereafter. However, now, around half of Leave voters think that Brexit is damaging the economy. And while many of those who feel that way would still vote to stay out of the EU, they are markedly less likely to do so than those who are more positive about the economic impact. Britain's recent economic woes have done much to reduce the popularity of the Brexit project.

BREXIT IDENTITIES

Professor Sara B Hobolt and Professor James Tilley

Brexit no longer dominates the front pages. Inflation, immigration and the NHS are now the most important issues for voters. Yet, the Brexit referendum has left a lasting imprint on British politics. One consequence was the emergence of deeply held political identities along Brexit lines. Even today, most people still think of themselves as either a Leaver or a Remainer. And these identities continue to resemble party attachments in their shaping of people's views of each other, of political parties and the economy.

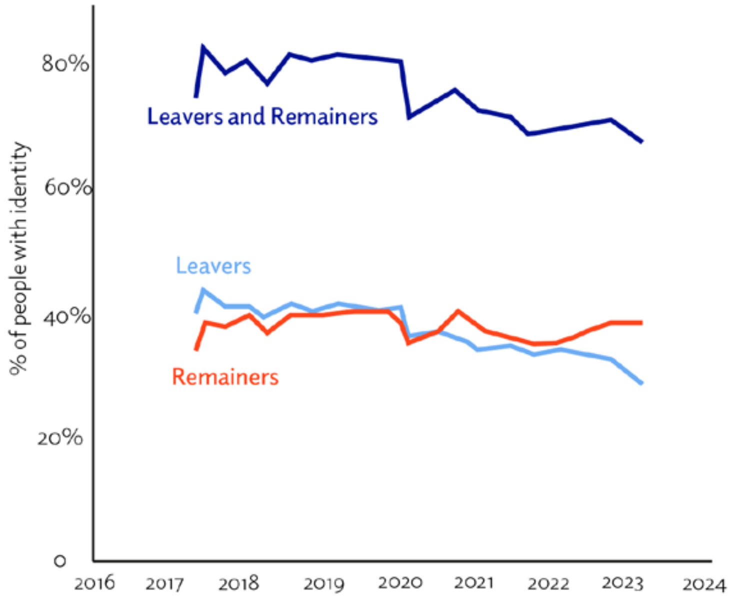
The chart below shows the proportion of people who identify as a Leaver or a Remainer, using a series of nineteen surveys carried out from the beginning of 2017 up to April 2023. Unsurprisingly, given that the UK has left the EU and since experienced a pandemic and economic downturn, it reveals a drift downwards in the number of people identifying with one side or the other. This is largely driven by the Leave side and corresponds to the growing number of people who are unhappy with Britain's choice to leave the EU.

Nonetheless, there is still a clear divide between Leavers and Remainers and over two-thirds of people who voted in 2016 continue to identify themselves in Brexit terms, down only slightly from 75% in early 2017. The difference between then and now is that, while Remainers have largely retained their identities (39% of 2016 voters think of themselves as Remainers), there are now slightly fewer Leave identifiers (29% of 2016 voters).

Among those who still identify as Leavers or Remainers, these identities continue to be strongly held. In April 2023, 65% of Leavers and 71% of Remainers said that their identity was very or extremely important to them. These numbers are lower than they were in the immediate aftermath of the referendum, but clear majorities of Brexit identifiers continue to feel strongly attached to their identity. And those attachments are still considerably stronger than partisan identities: only 34% of Conservatives and 53% of Labour identifiers think their partisan identity is very or extremely important to them.

Even seven years after the referendum, a large portion of voters still identify as either a 'Leaver' or 'Remainer'

Since the EU referendum, some people now think of themselves as 'Leavers' and 'Remainers'. Do you think of yourself as a Leaver, a Remainer, or neither?



NB: Only voters in the 2016 EU referendum are included

Source: S Hobolt and J Tilley, 2023

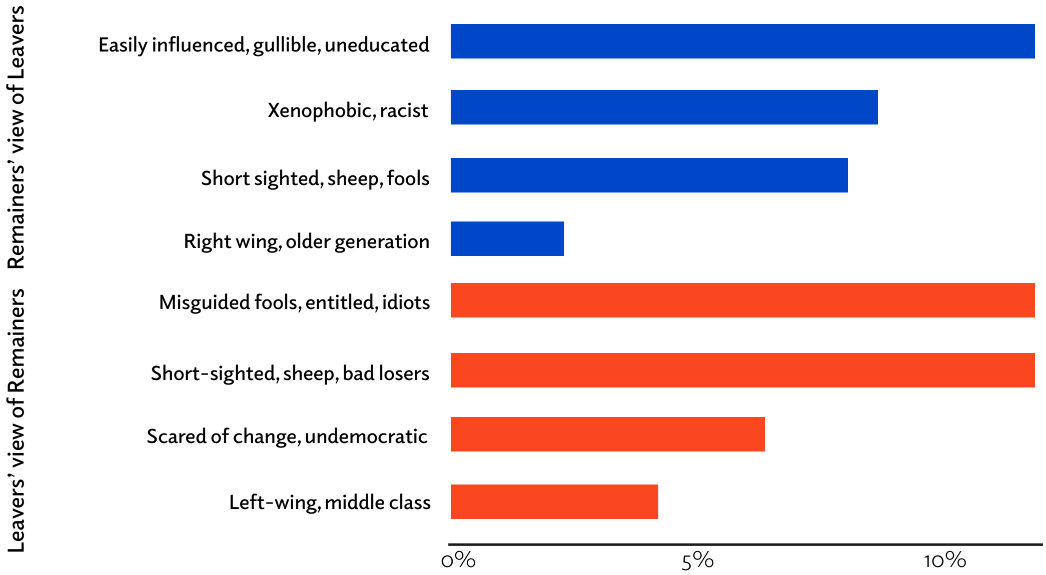
Identities formed by Brexit thus persist, even as the issue has become much less salient. Political identities are generally seen as positive as they tend to encourage political participation and engagement. The other side of the coin, however, is that these identities commonly translate into prejudice and animosity towards the 'other side'. This means that people not only feel closer to their own 'in-group' of Leavers or Remainers, but are also negative, or even hostile, towards people belonging to the other group.

This is shown in our two most recent surveys in which we ask people to describe those on the other side. The chart below shows the most common answers. There is not much love across the Brexit divide. Remainers say that Leavers are 'easily influenced and gullible', 'racist and xenophobic', and 'short-sighted sheep'. Leavers are similarly scathing about Remainers, also calling them 'short-sighted sheep', 'misguided fools', 'undemocratic' and 'bad losers' who will not accept they lost. While there are minorities on both sides who see the out-group as 'ordinary people with different opinions', most descriptions are far from charitable.

It is noteworthy that both think the other side are misguided. In general, the level of animosity that persists so many years after the referendum implies that Brexit may be a less topical political issue, but it is still highly emotive.

Those who identify as 'Leavers' or 'Remainers' are hostile towards those in the other group

If you think of people who identify as Leavers/Remainers, what kind of people are they? How would you describe them?



NB: Authors cluster responses that describe members of the other side using transformer-based topic modelling and show the proportion of people who mention each topic

Source: S Hobolt and J Tilley, 2023

Brexit identities continue to shape not only how we view each other, but also how we view the world. Most notably our 'Leave' or 'Remain' identities influence who we think is responsible for any economic woes. Remainers are much more likely to blame Brexit than Leavers. We asked the three quarters of people who thought economic conditions had got worse over the last year whether they thought that leaving the EU has affected current economic conditions in Britain. Remainers mainly attribute poor economic conditions to Brexit (average score of 9, where 10 indicates Brexit has affected the economy a lot and 0 means not at all), while Leavers are much less likely to do so (average score of 5). The same is the case when asked about other negative outcomes. Whether it is energy prices, Covid deaths or NHS problems, Remainers are likely to see Brexit as an important cause while Leavers attribute responsibility elsewhere.

It is clear that Brexit will not dominate next year's election campaign as it did in 2019. Yet at the same time, our data suggest Brexit identities remain remarkably resilient, even given a global pandemic and economic problems. A majority of voters - and particularly Remainers - still have strongly-held Brexit identities and this translates into how they view the other side and who they blame for adverse events.

While the Brexit issue is unlikely to the be primary concern for most voters in 2024, there remain underlying Brexit identities that shape how we see the world and that could be mobilized by political parties in the future.

‘BREGRET’

Professor Anand Menon and Rachel Wolf

Seven and a half years after the European referendum, public opinion has shifted significantly. In June of this year, Redfield and Wilton found there was a narrow majority in favour of rejoining the EU (53% to 47%). In November, YouGov, reported this had shifted to the extent that 57% thought that Britain was wrong to vote to leave the EU, while only 33% felt it had been the right thing to do.

Public opinion has certainly evolved. But to what extent is this down to ‘Bregret’? Or, to put it another way, how far can movements in the polls be attributed to Leave voters regretting their choice in 2016? There have, after all, been a number of studies suggesting that movement in public opinion is mostly down to demographic effects rather than the fact that Leave voters have reconsidered their original decision.

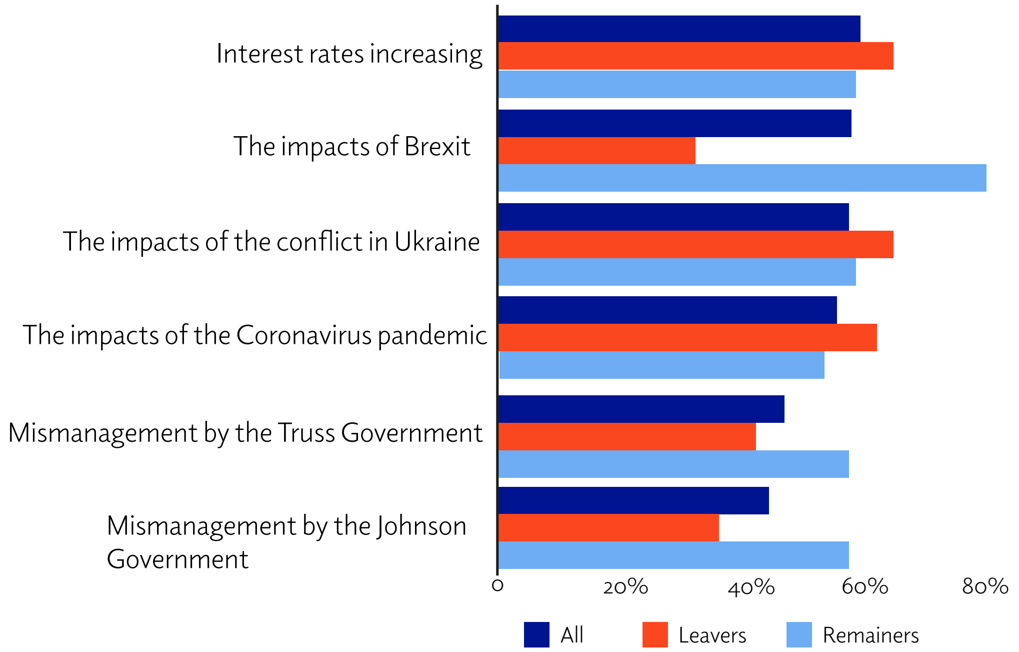
To attempt to answer this question, UK in a Changing Europe and Public First undertook a series of focus groups as well as a nationally representative survey. And the findings do indeed help shed light on the phenomenon of Bregret, how widespread it is, and how best we should interpret the state of public opinion.

16% of 2016 Leave voters now say that they would vote remain, compared to the 6% of Remainers who say they would now vote Leave. In another referendum, most Leavers say they would still vote the same way as they did.

Around 60% of voters say Brexit has negatively impacted the UK economy over the last year

You said that the UK economy has got worse over the last year. Which of the following best explains why this is? Select any which apply.

UK IN A CHANGING EUROPE



Source: Public First polling for UK in a Changing Europe. Fieldwork 26 May - 2 June 2023. N=4005.

One obvious reason for this is the country's recent economic performance. As John Curtice points out in this volume, there has been a dramatic increase in the number of people who believe Brexit has damaged the economy. And - strikingly - over half of Leave voters believed the economy is worse off as a result of Brexit at the start of this year.

This, however, does not translate neatly into decreasing faith in Brexit as a project. For one thing, Remainers and Leavers based their 2016 choices on different things. For Remainers, the key issue was the effect Brexit would have on the economy. For Leavers, by contrast, the dominant theme was 'control' over laws (68%) ahead even of the desire to have more control over immigration (61%).

For Leave supporters, then, Brexit was about more than the economy. That does not, however, imply that they see many positives about it to date. Overall, 52% of our respondents say Brexit has gone badly or very badly. And a paltry 18% of Leavers say Brexit is going well.

Why, then, is it that a significant majority of Leave voters do not regret their vote? One reason is that 61% of them believe that, in the end, Brexit will turn out well. That is to say, ultimately, they believe that their choice in 2016 will be vindicated.

A slightly more cautionary explanation resides in the fact that 70% of Leave voters think there are ways Brexit could have a positive impact on the economy but the opportunities on offer were not seized. Many of the Leavers who feel Brexit has not gone well blame politicians for this. Nearly half (48%) say politicians could have made Brexit work but did not even try. As one woman in our focus group in Bassetlaw put it, 'I feel like [politicians] actually sticking to what they say they're going to do would be a great start, which is sort of the government all over, isn't it? Like selling you a dream and delivering you a nightmare'.

A perceived failure on the part of politicians to make Brexit work as well as it could have is hardly a recipe for increasing trust in politics in this group that had traditionally been most distrustful of politicians, but amongst whom levels of trust had increased in the aftermath of the referendum. Now, both sides display the same scepticism. 77% of Leavers and 75% of Remainers in our survey believe that 'politicians generally act in their own interests rather than the interests of the public'. Or, as one female focus group in Thurrock put it, "[Brexit has] changed the way I vote because I don't trust any of them [politicians], I don't believe a word."

A brooding distrust of politicians is hardly healthy in a democracy. Which is not to say that Brexit will necessary be the battleground on which these voters want to fight. 54% of voters wish we would stop talking about the issue all together and move on to something else; a plurality of Remainers (42%) and a majority of those who voted for Leave and think Brexit is going poorly (63%) think the same.

Leavers in general do not regret voting for Brexit, albeit large numbers of people now believe it is not going well. The challenge facing our political class is how to manage the swirling dissatisfaction that does not seek to relitigate Brexit, but nevertheless feels let down.

THE EU27 AND THE UK

Professor Simon Usherwood and Dr David Moloney

It is easy to forget that Brexit was not exclusively about the UK: the European Union (EU) was also intimately involved. The loss of a large member state and subsequent difficulties in agreeing a new relationship had noticeable impacts within the EU, both in terms of how people saw the UK and how they viewed EU membership. However, Brexit's impacts on European public opinion are increasingly shaped by other factors.

The 2016 referendum on UK membership came at a time when there was a significant popular uncertainty about the EU in member states. Pew research in the spring of that year across ten member states highlighted that more than twice as many respondents wanted to return some powers to national governments (42%) as backed more powers for the EU (19%) and that favourable views (51%) of the EU only just outstripped unfavourable ones (47%). Such ambivalence about the EU points to structural challenges the organisation has long faced around popular engagement and identification.

However, soon after the Brexit vote, there was a significant and sustained rise in support for the Union across member states. Eupinions found a 5% rise in support for membership between March 2016 and August 2017, while the European Social Survey records lower levels for voting to leave the EU in every member state for which data is available between 2016 and the spring of 2023.

Part of this can be attributed to perceptions of how the UK handled the negotiation of the Withdrawal Agreement and the Trade & Cooperation Agreement between 2017 and 2020, as well as the general instability of British politics at this time. Part, too, can be linked to perceptions of what Brexit might mean for both the Union and their own country: fears of a Brexit outcome that might compromise the stability of the EU led to strong support for the Commission's approach to those negotiations.

Yet while the period of negotiations witnessed strengthened support for the EU, this did not translate neatly into more negative views of the UK itself. Indeed, it is notable that polling on this question has become increasingly rare in the past couple of years, itself a reflection of the decreasing salience of the question. In 2021, Redfield and Wilton produced the last significant survey around this theme. While more respondents in France, Germany and Spain thought the decision to leave was wrong for the UK than right, a fifth to a third of people disagreed. Indeed, in Italy, more thought it right than wrong. However, in all four countries most people had an unchanged view of the UK.

Importantly, the same survey also suggested a relationship between the economic performance of the UK and views in member states about membership. When asked 'if the UK and its economy are in a good state in five years, I will be more likely to support leaving the EU', 50% of Italians and 47% of French respondents agreed. In Spain, more disagreed with this question than agreed (34% to 33%), with Germans similarly ambivalent (36% agree to 31% disagree). Add to this roughly a quarter of respondents in all four countries with ambivalent views and it is evident that over time attitudes will refer less and less to the immediate disorder of the Brexit negotiations and more to the relative situation of the EU and the UK.

The EU has moved on from Brexit. This is partly because the tumult of the May and Johnson years has passed and there seems to be a firmer basis for stable relations, not least given the Windsor Framework. But it's rather more because there have been a lot of other things for European publics to focus on, from the Covid pandemic to the invasion of Ukraine.

At the same time, Brexit has led to a perception that the UK is less influential in the world than it used to be: Pew recorded pluralities for a weaker British role in five of the ten EU member states it surveyed in 2022, including France and Germany, while not finding the same in any of the non-European countries surveyed. By contrast, the EU itself has favourable - and growing - majorities in every case.

Whether the UK wants to simply make the most of its current treaty arrangements or thinks that some kind of structural reform or revision is needed, it will have to work to demonstrate to both EU leaders and publics that it is a reliable and significant international partner. While two-thirds of respondents in a June 2023 Ipsos survey of nine member states thought it very or fairly important to maintain close relations with the UK, a majority considered EU and UK interests to be partly or fully at odds with each other.

There is a danger here for the UK if it is seen not to matter much for European publics and if EU politicians have other priorities. Specifically, it risks finding that, even if it does manage to decide on a new approach to relations with the EU, the latter might not be interested in devoting time and effort to making that happen. Time spent revisiting relations with the UK is time lost focusing on questions like the cost of living, energy supply or the environment, which are all seen as more important by EU citizens. Public opinion might be broadly sympathetic towards improving links, but that should not be confused with ranking it as a high priority; this is as true for the EU as it is for the UK.

The UK in a Changing Europe promotes rigorous, high-quality and independent research into the complex and ever changing relationship between the UK and the EU. It is funded by the Economic and Social Research Council and based at King's College London.

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