

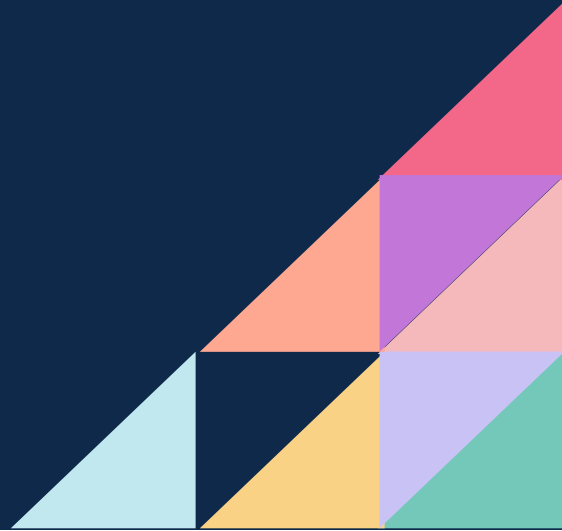


UK 2040 OPTIONS

The options ahead: what people in election battlegrounds think

By Lauren Orso, Data Journalist, and Ben Szreter, Senior Policy Manager

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Foreword

Despite the many column inches dedicated to debating contentious issues, there is beneath it all a high degree of consensus among the public about the biggest challenges we face. The research we've conducted with Opinium confirms that this is true in the battleground constituencies for the next election. There are high levels of alignment on public priorities, with cost of living and the NHS streets ahead of other issues in most of the country, regardless of voting intention.

This research also shows us, though, that if you ask people which issues are most important to resolve by 2040, for the next generation, things look a little different. Issues that struggle to get a look in when the question is asked of the "now" suddenly surge up the priority list when people are asked to think beyond present day challenges. Issues like climate, economic growth and affordable housing become much more salient.

UK 2040 Options is a new policy project led by Nesta and the Behavioural Insights Team, offering policymakers the opportunity to think ambitiously about different pathways to address the biggest challenges facing the country - not just today, but in the near future too.

With our partners and a wide range of contributors we aim to provide a space for constructive debate about the country's future across a set of defining issues.

In each policy area we'll work with established expertise and emerging thinkers alike, assessing the policy landscape, exploring the most fertile or important choices in more depth, curating a set of options for policy solutions and then testing, interrogating and improving them. Where are we heading as it stands? What can we change? And what can we learn by looking at them together, in the round?

There's more to come as we kick off the work in each of our initial themes: economic growth, net zero, health, education, wealth and income inequality, technology, tax, power and place. Do get in touch if you would like to contribute to any of these themes, and we'll be sharing our thoughts and findings as we go.

Alex Burns
Director of UK 2040 Options

Methodology

At the next general election, Labour would need to win in an additional 124 parliamentary constituencies to achieve an overall majority. We polled the 124 constituencies that Labour came closest to winning (ie, where they were in second place) in the 2019 general election. We also polled the 100 constituencies most narrowly won by the Conservatives in 2019. There is a significant degree of overlap between these two groups of constituencies so the total number polled in our data is 144. We believe these 144 constituencies (126 of which were won by the Conservatives in 2019) are a good representation of the “battlegrounds”; these are the people and places most likely to decide which party wins the next election.

Findings

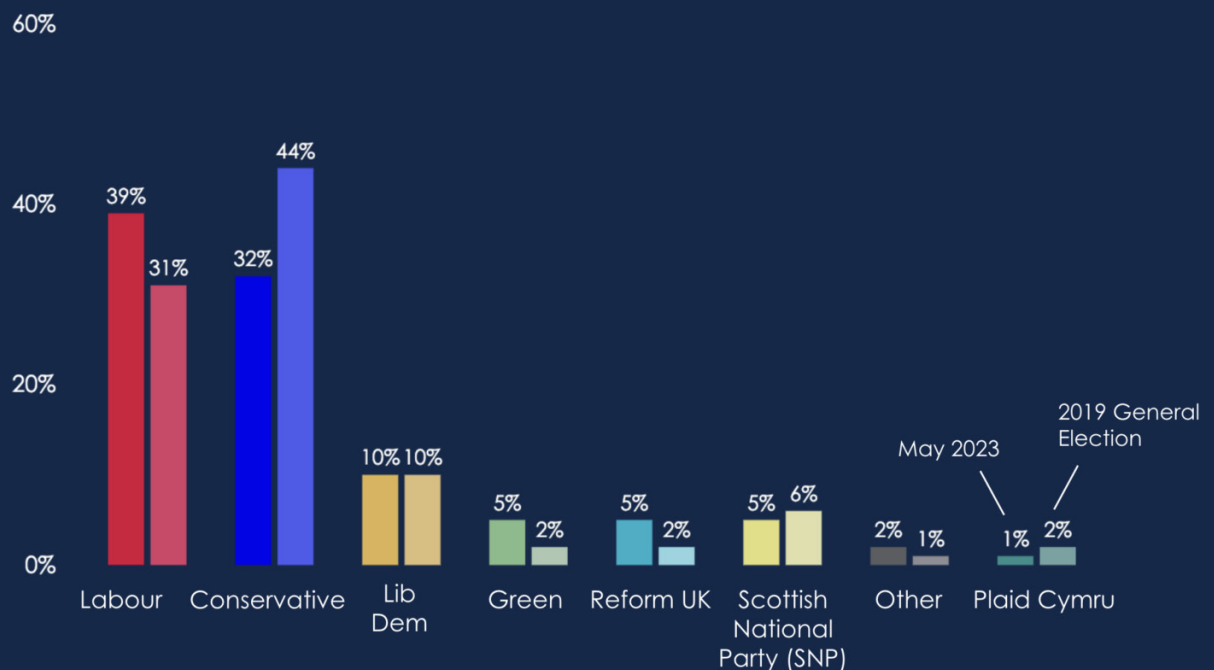
Labour leads in Britain's battleground constituencies

Labour is ahead in the 144 constituencies that are likely to decide the next election, with 39% of the vote, while the Conservatives are at 32%. This amounts to a 10-point swing from the Conservatives to Labour since the 2019 election based on 2019 voting in the same seats. For the Conservatives, this represents a drop of 12 points with Labour up eight percentage points.

Among these battleground constituencies, Labour and the Conservatives are essentially neck and neck in the South West (34% to 36%) and the East of England (36% to 35%). Labour's lead on the Conservatives is 8 points in the North West (43% to 35%), 17 points in Yorkshire (46% to 29%), 16 points in the North East (51% to 35%) and 15 points ahead in the Midlands (48% to 33%). In Scotland, Labour are on 32%, behind the SNP on 37%.

Labour now leads by 7 points in battleground constituencies

Headline voting intention, May 2023 (left) and 2019 vote (right)



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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Labour ahead in all battlegrounds north of London in England and Wales, but the SNP still leads overall in Scottish battlegrounds

Voting intention, top three parties by region (%)

■ Liberal Democrat
 ■ Labour
 ■ Conservative
 ■ Plaid Cymru
 ■ Scottish National Party (SNP)
 ■ Reform



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies


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Voters in these battleground constituencies are strongly driven by dislike of other parties

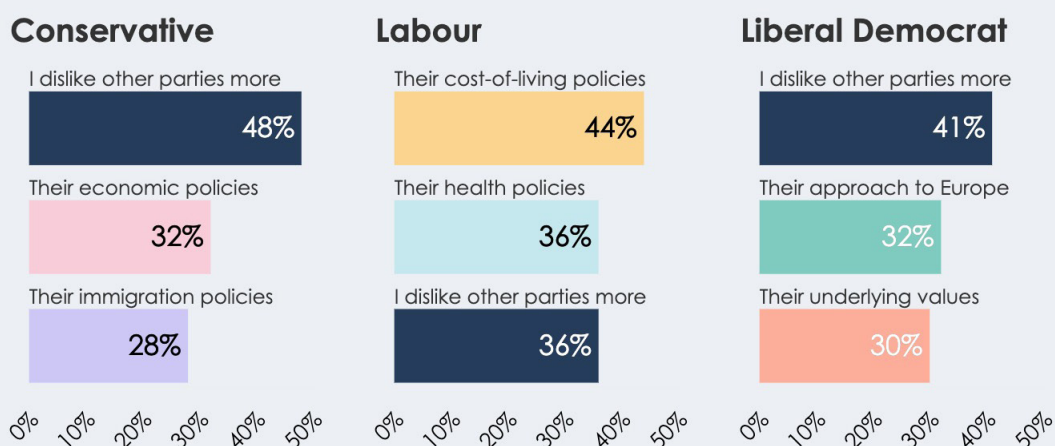
Among all respondents, a dislike of other parties is the single biggest driver of voting intention (39%). This is the number one factor for people intending to vote Conservative, followed by economic policy and immigration.

For those intending to vote Labour, policy to deal with the cost of living is the number one factor driving voting intention, followed by health policy.

Europe remains an important factor only for those intending to vote Liberal Democrat or SNP, where underlying values also feature prominently in decision making.

Nearly 50% of people in these battleground constituencies who intend to vote Conservative are driven by their dislike for other parties

Top three reasons why people will vote for their chosen party in the next general election (%)



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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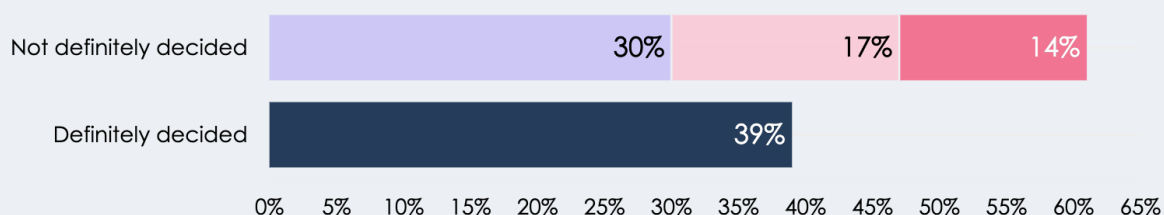
Three in five people in battleground constituencies say they have not definitely decided which party to vote for

We found that 61% of people in these constituencies haven't definitely decided who to vote for – 39% were definitely decided, 30% were fairly sure but not certain, 17% were still deciding between two or more parties and 14% said they had 'no idea' which party to choose.

61% of people in battleground constituencies have not definitely decided who they will vote for

Q: Have you made up your mind about which party you will vote for at the next general election, assuming it is to be held next year in 2024?

- I have definitely decided which party to vote for
- I am fairly sure but haven't definitely decided which party to vote for
- I'm still deciding between two (or more) parties
- I have no idea which party to vote for



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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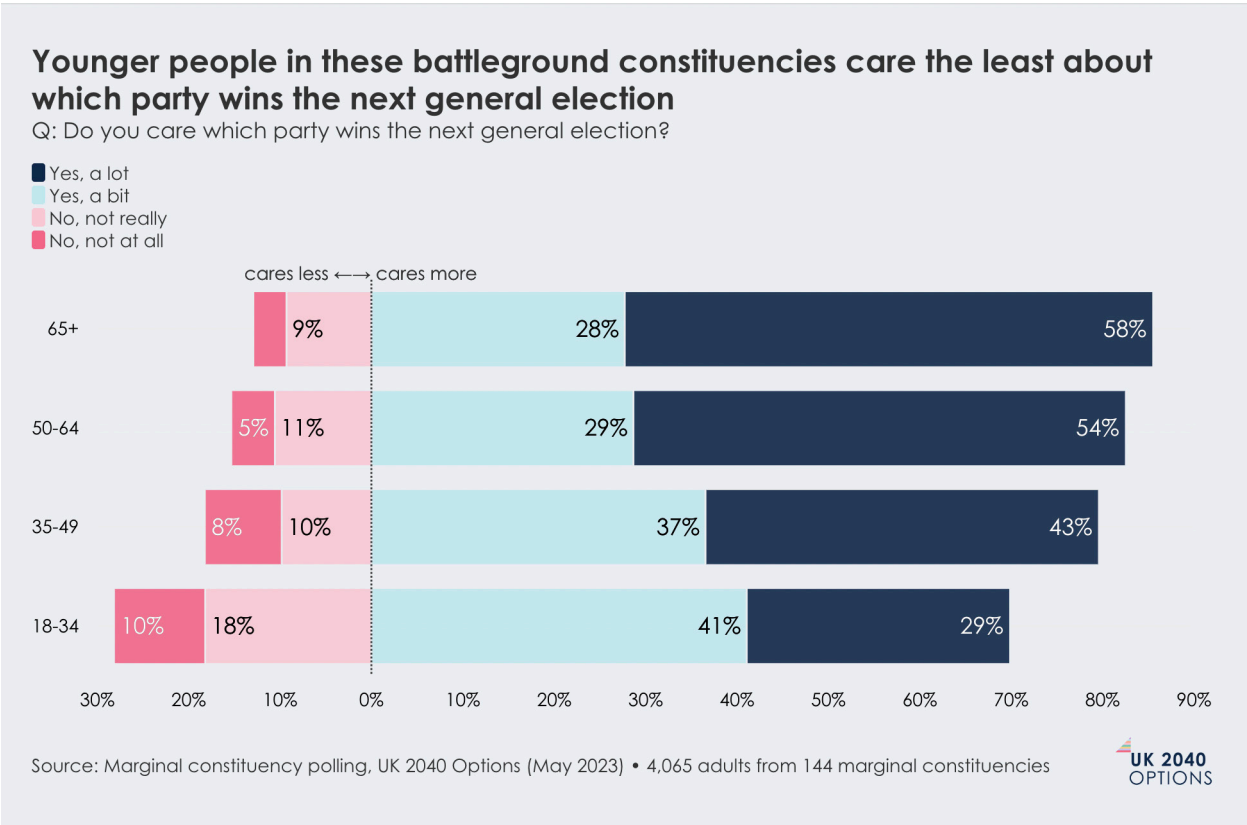
Younger voters in these battleground constituencies are least likely to feel that the next election is important

Younger people are more apathetic about the outcome of the next general election. While just 19% of people say that they don't care about the next election, this rises to 28% of 18-34 year olds.

Perhaps unsurprisingly, if you care less about the outcome of the next election you are far less likely to say that you will vote. Nearly all (96%) of those who have definitely decided which party to vote for at the next election care about the outcome – dropping to 74% of those who are yet to decide and 23% of those who do not care who wins.

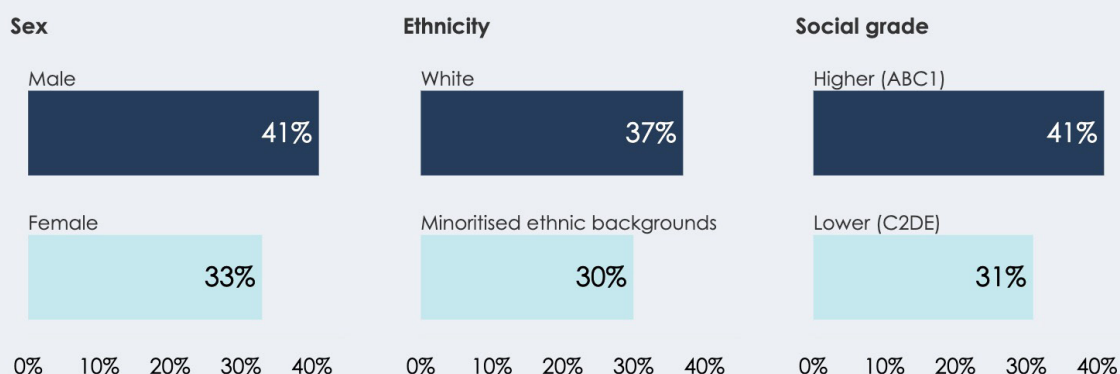
Lots of people also feel poorly represented by the options available. Just 37% of respondents in these battleground constituencies feel well represented while 40% said none of the political parties represent their views and preferences. Both of these figures are slightly worse than comparative data in the nationally representative 2019 British Election Study where 46% of people felt represented and 35% did not.

In these constituencies, women are significantly less likely to feel well represented than men (8 percentage points), people from minoritised ethnic backgrounds are less likely to feel represented than white people (7 percentage points), and people from lower income backgrounds are also less likely to feel represented than those from higher income backgrounds (10 percentage points).



Fewer women, ethnic minorities and people from lower income backgrounds in battleground constituencies feel any party represents their views well

Share who say any party represents their views well (%)



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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Inflation, NHS, energy prices and immigration are seen as the most important issues

The cost of living comes out as the most important issue in almost every region (other than in Wales where health is most important) and among all age groups other than the over-65s (for whom health is also the most important issue).

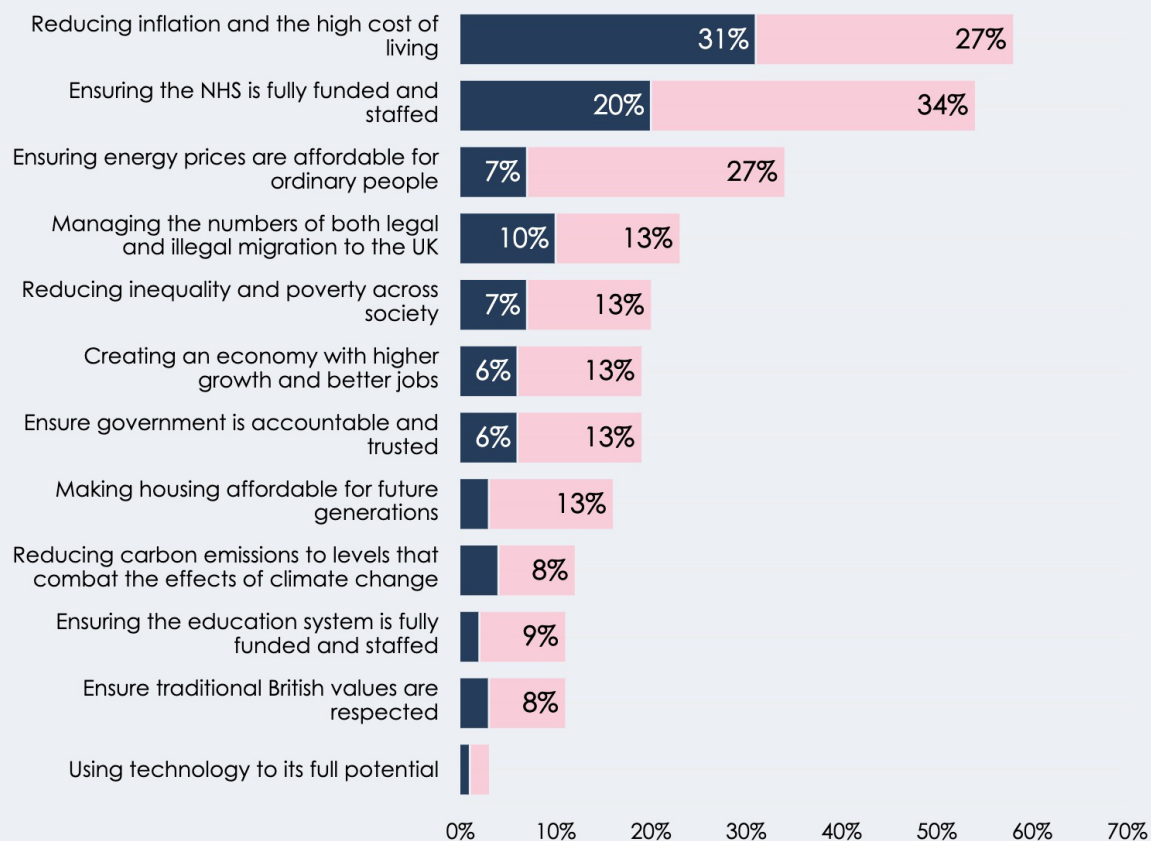
In second place overall, one in five people in battleground constituencies think that ensuring the NHS is fully funded and staffed is the most important issue facing the country. Respondents similarly would prioritise both help with the cost of living and NHS funding and staffing for any additional government spending.

The third most important issue is ensuring energy prices are affordable for ordinary people: 7% say it is the most important problem but a further 27% list it as a top three problem. Just outside of the top three is managing the numbers of both legal and illegal migration, with 10% indicating it is the most important problem and a further 13% listing it as a top three problem.

Reducing inflation and ensuring the NHS is fully funded and staffed are considered the most important issues facing the country for people in battleground constituencies

Q: Which of the following, if any, is the most important issue facing the country?

■ Most important issue ■ Top three important

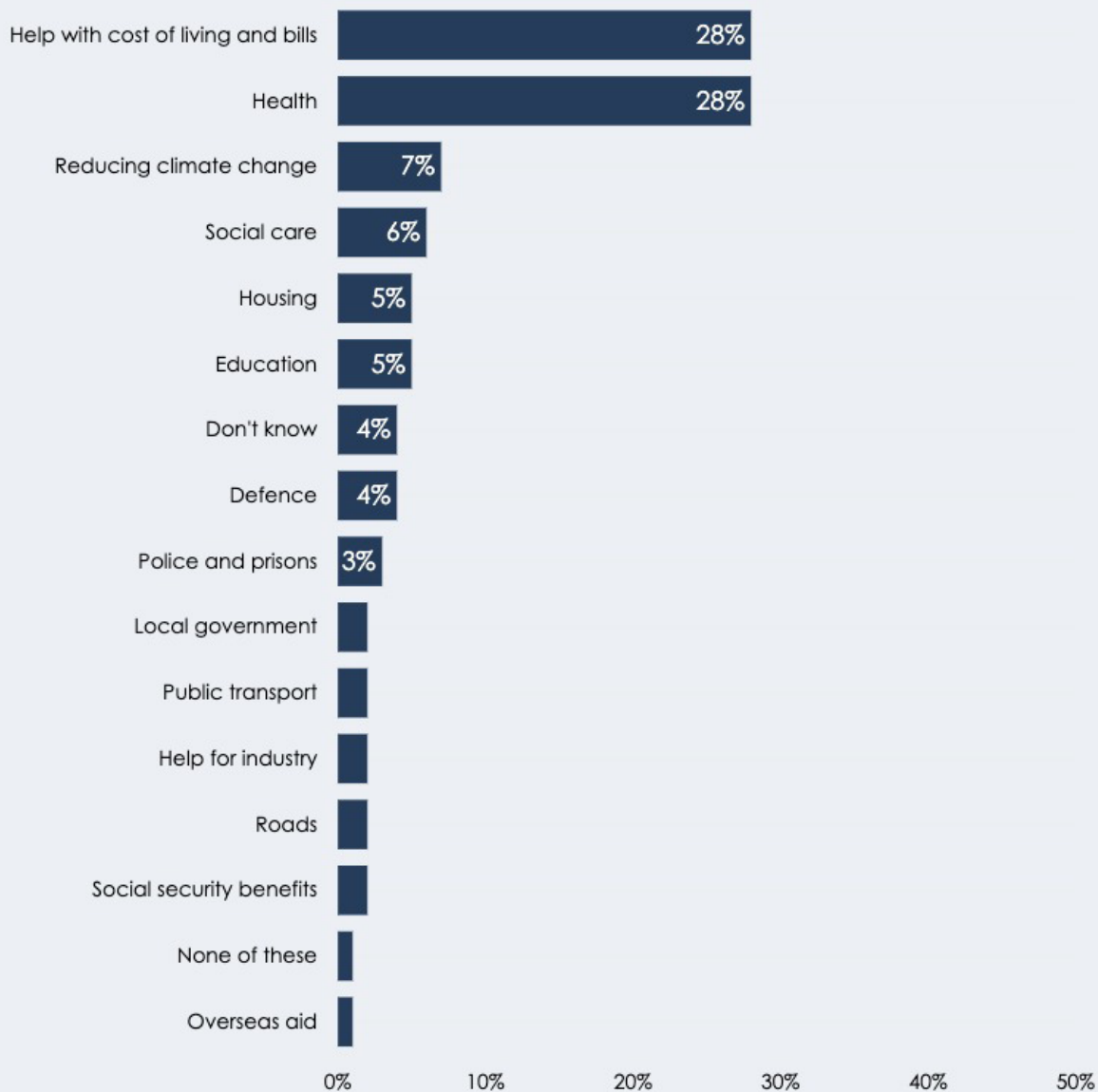


Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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People in battleground constituencies think that the cost of living and health should be top government spending priorities

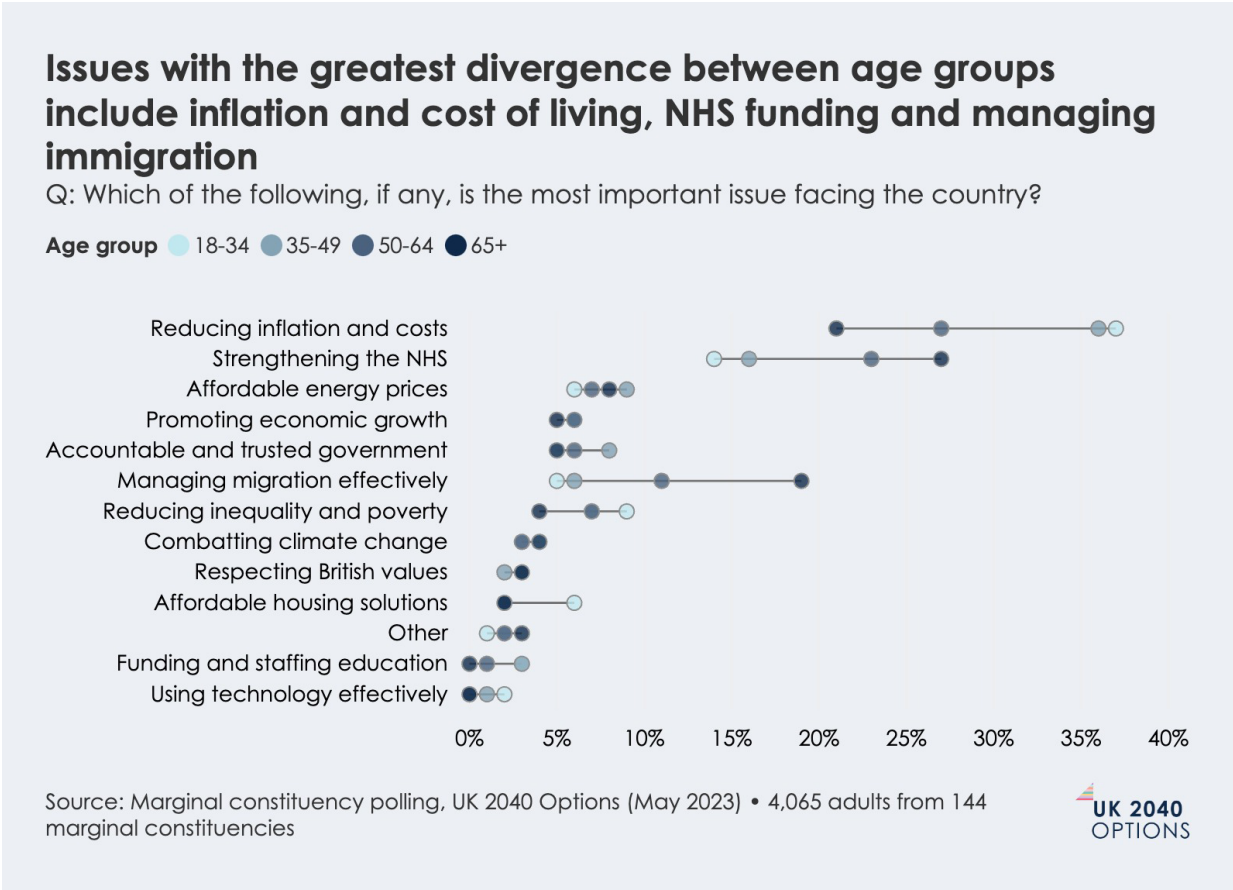
Q: Here are some items of government spending. Which of them, if any, would be your highest priority for extra spending?



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

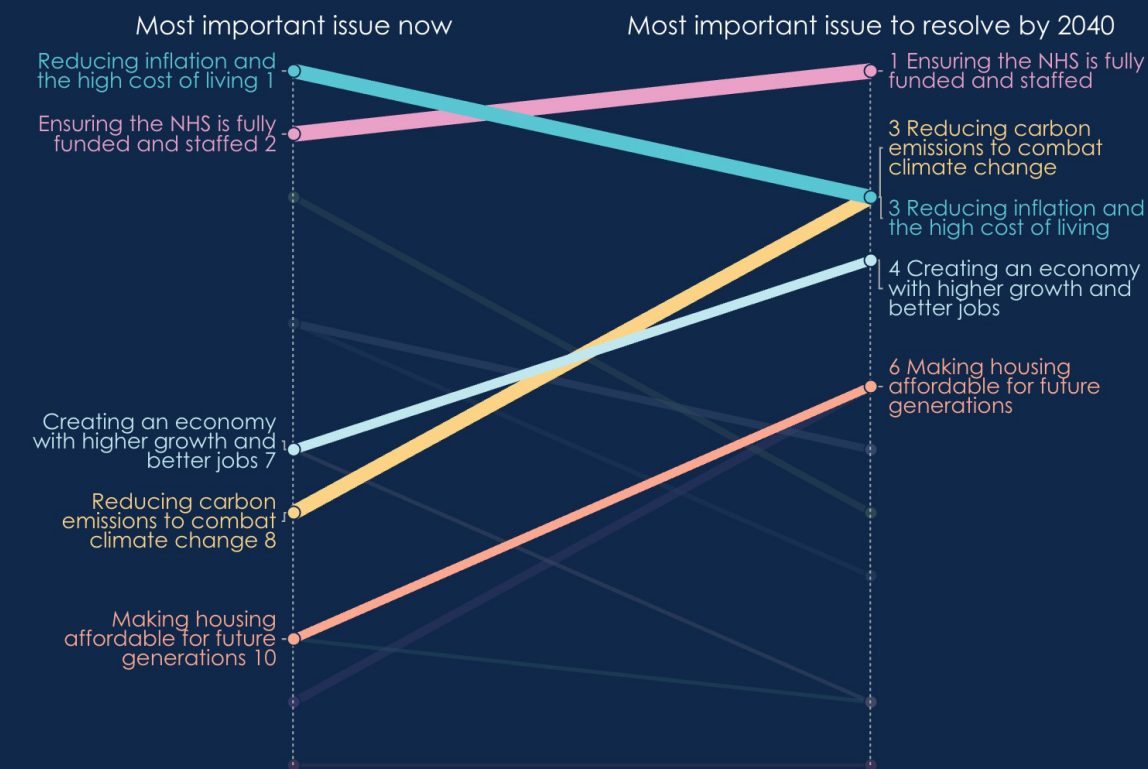
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Issue prioritisation is also heavily determined by the age of respondents. Younger people are most concerned about economic and cost of living factors with 37% of 18-34 year olds choosing reducing inflation as a top priority. By contrast, just 21% of over-65s think it's the top priority; instead they think that health is the top priority (27%).



Tackling climate change rises steeply in importance when people are asked to consider issues in 2040

Q: Which of the following, if any, is the most important issue facing the country? And which of the following issues, if any, is most important to resolve by 2040 for children born today? (1-12 = rank)



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies
Thickness of line denotes share of people who say issue is important in 2040

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When asked about longer term challenges, climate becomes much more important as a priority issue

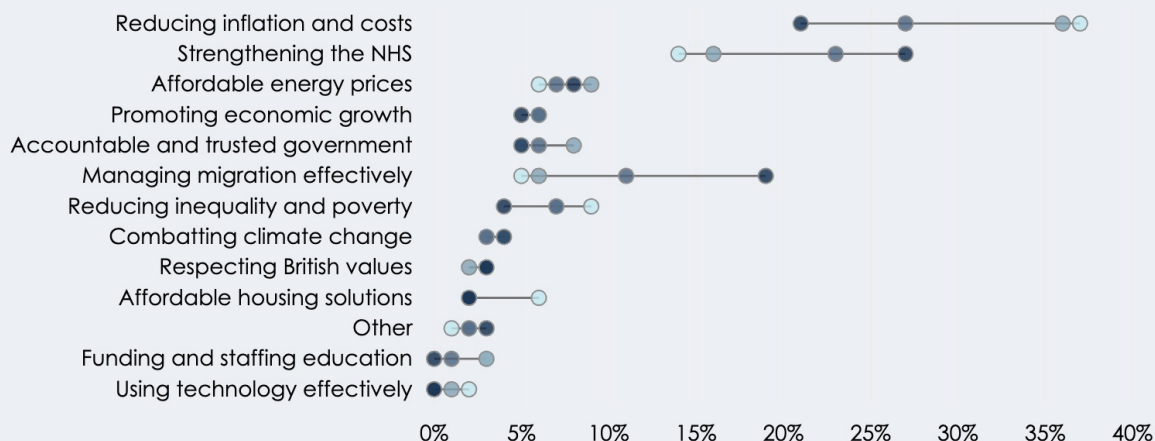
It's worth noting that there is often a significant difference between issues people are prioritising in the here and now versus those they consider to be the most critical in the longer term. In particular, reducing carbon emissions (up to 14% from 7%), fostering a higher growth economy (up to 9% from 6%) and ensuring affordable housing (up to 8% from 3%) rise in importance when people are asked to think about the longer term.

Issues that are prioritised for 2040 are much more widely spread compared to issues considered most important now, with the latter clustering heavily around two issues: inflation and the NHS.

Issues with the greatest divergence between age groups include inflation and cost of living, NHS funding and managing immigration

Q: Which of the following, if any, is the most important issue facing the country?

Age group 18-34 35-49 50-64 65+



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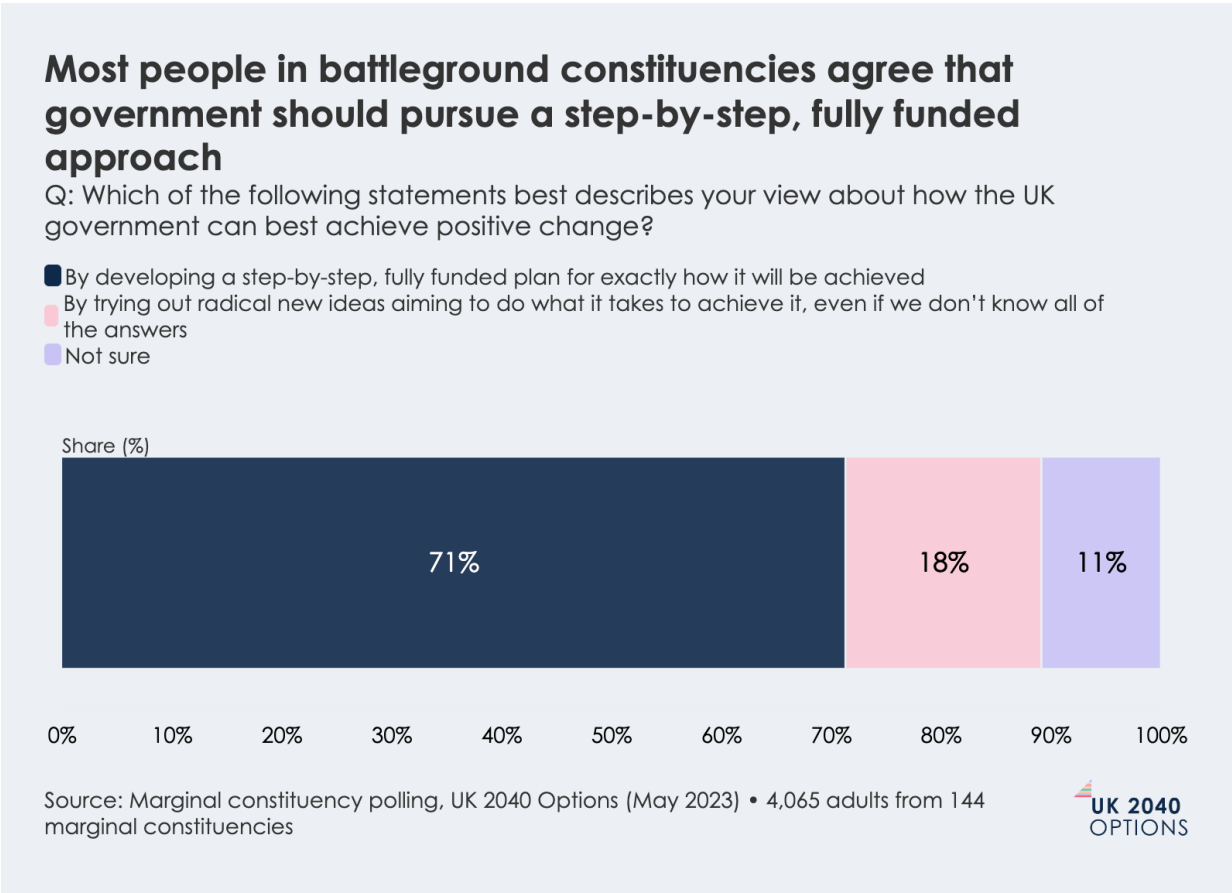
One in five (20%) younger people believe that inflation and the cost of living is the most important issue to resolve by 2040, whereas just 7% of over-65s agree. There is broad agreement overall about the importance of reducing carbon emissions to tackle climate change but younger respondents are the least likely to prioritise it as the most important long-term issue. This may be due to the priority placed by younger respondents on economic issues and affordable housing.

There is some divergence by age on both immigration policy and on protecting British values as just 3% of younger people prioritise immigration policy compared with one in ten (10%) over-65s. Similarly 5% of over-65s think it's most important to protect British values compared to just 1% of younger people.

People in marginal constituencies are split on whether the UK Government should prioritise tackling current issues or making bold decisions for the future

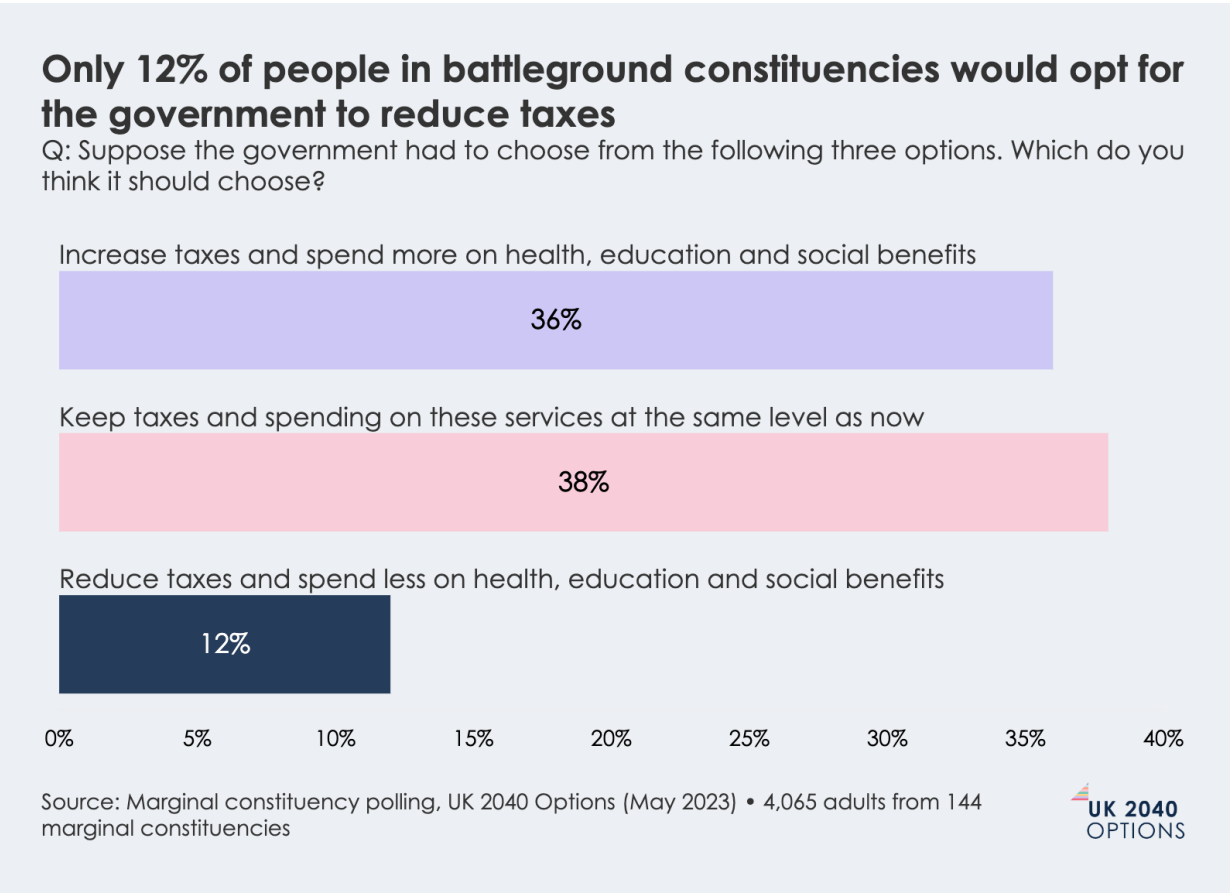
Half of people polled think the UK Government should focus on fixing specific problems in the here and now, while 42% feel it should make bold decisions about the future direction of the country to solve long-term problems. People are also split on needing continuity or a fresh vision (49% to 44% respectively).

Perhaps reflecting hangover effects from the Truss premiership, respondents seem not to be in the mood for experimentation. There is a clear preference for incremental change with 72% choosing step-by-step, fully funded change over radical new ideas for positive change.

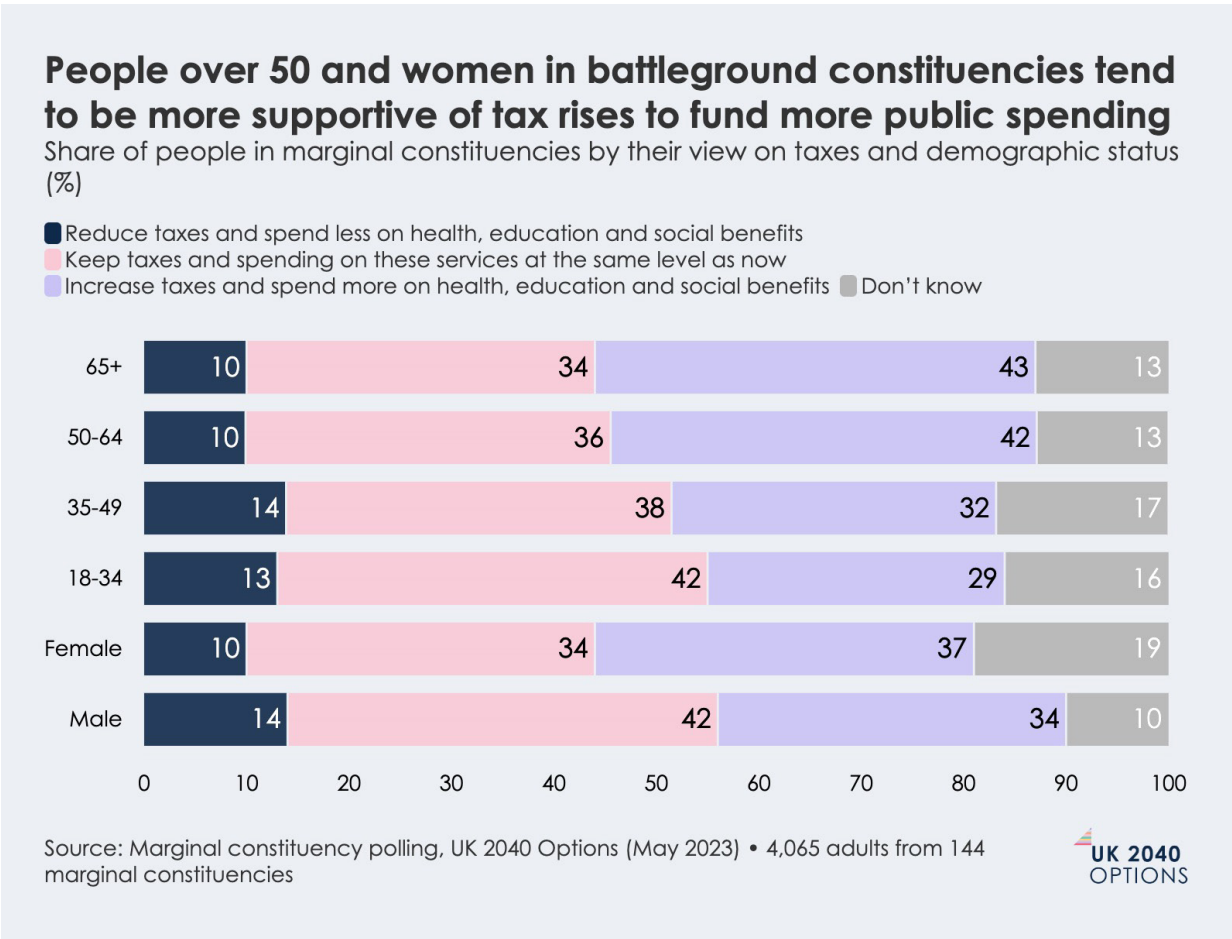


A majority of voters would rather increase taxes or keep them the same than cut them and spend less

Respondents in the UK's battleground constituencies are divided between those who want to keep tax and spending at current levels (38%) and those who want to raise taxes to spend more on public services (36%). Just 12% expressed a preference for lower taxes and less spending, although this is low it is twice the number recorded by a nationally representative sample in the most recent British Social Attitudes survey in 2021. Even among people who have previously voted Conservative and thus who may traditionally support a smaller state, we found just 15% in battlegrounds want to cut taxes and spend less.

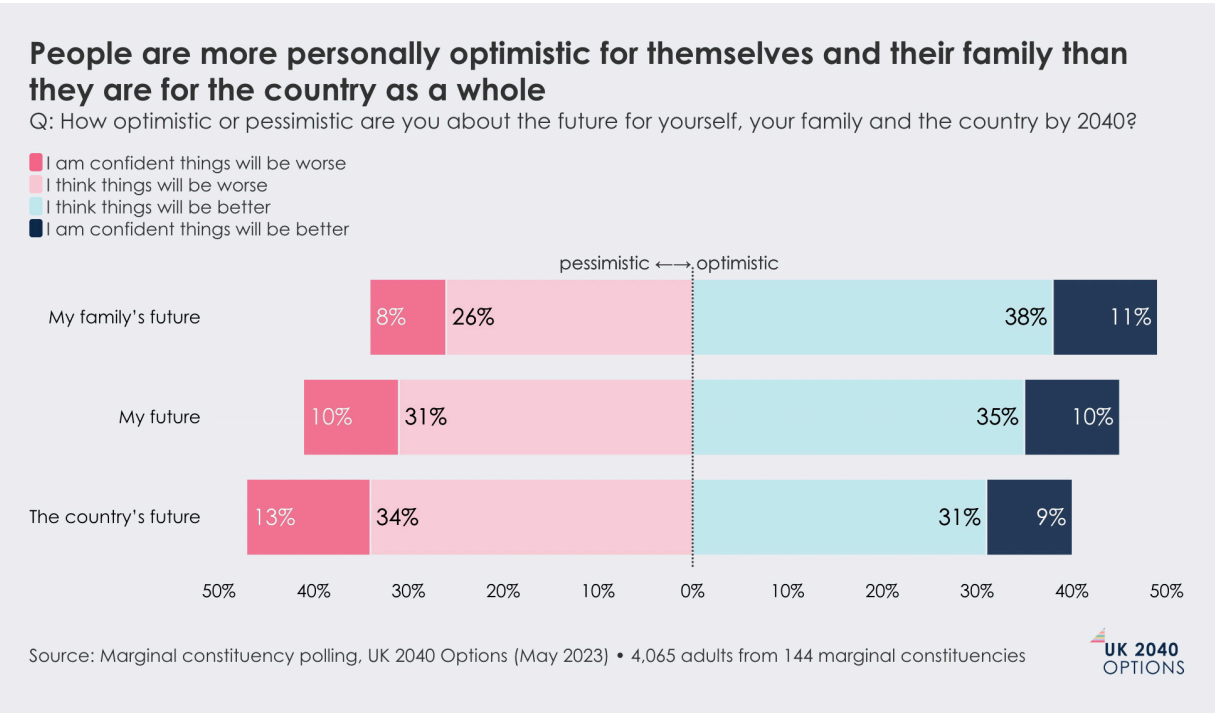


Older respondents are significantly more likely to support tax increases than younger people, perhaps reflecting the continued squeeze on younger people's spending power. Over-50s are more than ten percentage points more likely to support tax increases to fund public services than under-50s (43% to 31%).



People in battleground constituencies are pessimistic about the country but more optimistic about their families' prospects

More people are more optimistic for their family's future (50%) than they are about their own (45%). People are much more pessimistic about the country's future, with only 40% thinking things will improve by 2040.

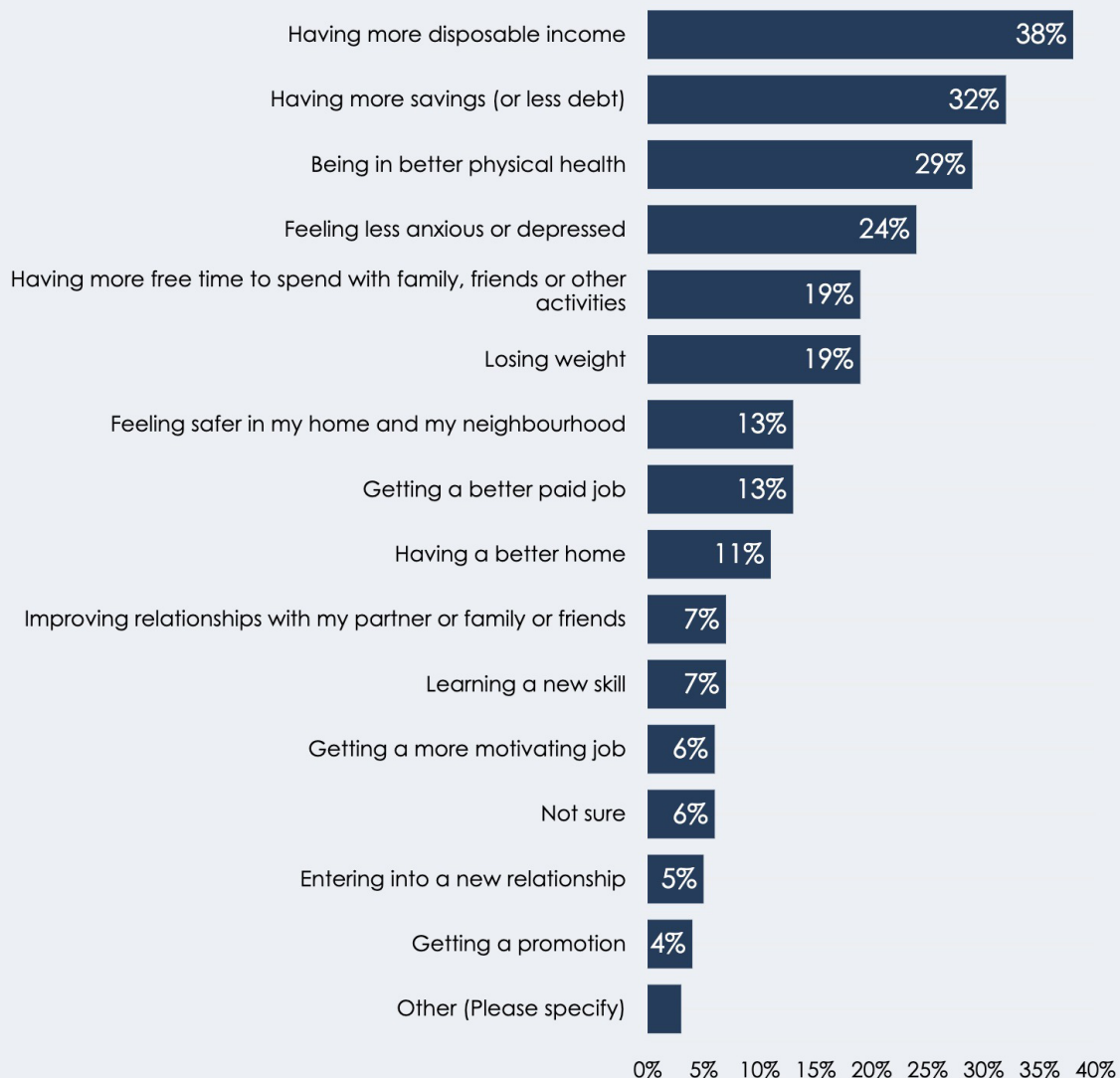


Wealth and health would make the biggest difference to the wellbeing and happiness of people in battleground constituencies

Asked what would make the biggest positive change to their personal wellbeing and happiness, 38% of respondents chose having more disposable income and 32% chose having more savings. Health is also important for people, with 29% choosing better physical health and 24% of people choosing better mental health. Beyond that, nearly 1 in 5 identify more free time or losing weight as their top priorities.

Having more disposable income, more savings or being in better physical health would make the most difference to people's personal wellbeing and happiness

Q: What would make the most difference to your personal wellbeing and happiness now?
Please select up to three options that best apply



Source: Marginal constituency polling, UK 2040 Options (May 2023) • 4,065 adults from 144 marginal constituencies

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UK Options 2040 supports policymakers as they make choices about what to prioritise and how to deliver: setting out alternative policy options and pathways for the future, creating space for honest debate about the trade offs and testing and interrogating ideas that take us beyond immediate crises.

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