

# No turning back

*The 2019 General Election and the UK's  
new electoral geography*



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Edited by Will Tanner

ONWARD 

# About Onward

Onward is a campaigning thinktank whose mission is to renew the centre right for the next generation. We exist to make Britain fairer, more prosperous and more united, by generating a new wave of modernising ideas and a fresh kind of politics that reaches out to new groups of people.

We believe in a mainstream conservatism – one that recognises the value of markets and supports the good that government can do, is unapologetic about standing up to vested interests, and assiduous in supporting the hardworking, aspirational and those left behind. Our goal is to address the needs of the whole country: young as well as old; urban as well as rural; and for all parts of the UK – particularly places that feel neglected or ignored in Westminster. We will achieve this by developing practical policies that work. Our team has worked both at a high level in government and for successful thinktanks. We know how to produce big ideas that resonate with policymakers, the media and the public.

We will engage ordinary people across the country and work with them to make our ideas a reality.

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# Summary of the argument



It is not hyperbole to say that the last general election was unique in British political history. The pretext was a period of unprecedented volatility, with skin-deep party attachment and a line between landslide and continued stasis that was wafer-thin. The exit poll confirmed the first time ever that a governing party increased its vote share in three consecutive tests at the ballot box. But it was the complexion of victory that made 2019 particularly notable: a realignment that unequivocally redrew Britain's electoral geography and partisan coalitions overnight.

This report sets out how this realignment, which many dismissed as implausible, came to pass. In the following chapters, we use large sample polling conducted throughout November and December to identify the role of the election campaign, understand the composition and stickiness of the coalitions it left behind, and explore what it means for the main parties and their policies in this Parliament. What becomes visible is a restructuring of the electorate that is currently febrile and temporary but could shortly become resilient and permanent.

The Conservatives successfully consolidated the Brexit vote, boosting their share of Leave voters from 57% to 71% during the campaign and leveraging "contract votes" to deliver a specific outcome. 10% of British voters and 23% of the party's 2019 base voted for the Conservatives despite it not being their ideal choice of party. Without these contract electors, the Conservative vote share would have been 33%, rather than 45%, and halved the majority from 80 to 42.

But if these voters came for Brexit, there is good reason to believe they may stay for social and economic reasons. The Conservative Party now has a coalition that is highly homogeneous across both social (50% "very" or "closely" aligned) and economic (60% "very" or "closely" aligned) axes. This offers a short term route to further consolidation, building on the successful targeting of 'Workington Man' and Labour Leavers, 77% and 32% of which voted Conservative respectively – up from 55% and 10% in 2017. However this is only sustainable in the long term if the party fixes the hole in its coalition among younger voters, which are increasingly less likely than older generations to vote Conservative as they age.

The Labour Party, meanwhile, suffered its fourth consecutive defeat and arguably its worst since the 1930s, for conflicting reasons that will be harder to resolve. On the one hand, Labour lost around 1.1 million voters to the Conservative Party, primarily due to their socially and culturally traditional views and their inability to stand Jeremy Corbyn: just 11% viewed the Labour leader positively. On the other, the Opposition saw 960,000 voters defect to the Liberal Democrats, who were, in general, more economically left-wing and socially liberal than the national average. 41% did so because they thought it would make stopping Brexit or delivering a second referendum more likely.

The election campaign itself did not deliver the Labour surge many expected. Labour started from a low base which deteriorated further over time, suffering from a uniquely unpopular leader and an inability to move the debate from Brexit. The Conservative campaign's relentless focus on "Getting Brexit Done" actually improved the party's standing and unified a new coalition of voters over the course of the campaign. 79% of 2017 Conservative voters remained loyal in 2019, but just 67% of 2017 Labour voters, and less than half of Labour Leavers, gave Jeremy Corbyn another shot at power.

The resulting electorate is one in which old concepts of Left and Right have little purchase. Old ciphers are replaced by new tribes shaped by socio-cultural values and exacerbated by Brexit. The most important markers of political affiliation are, in order, a voter's age, their level of education, and how they voted in 2016.

It is now impossible to characterise the Conservatives as the party of wealth, privilege or the South of England. The party won more than half (51%) of skilled working class (C2) voters, and the largest share of workers in lower or unskilled occupations (DE), as well as a majority of apprentices, school leavers and those with no qualifications whatsoever. In geographic terms, the Conservatives won three quarters of Midlands and two fifths of Northern seats, compared to a quarter and a tenth respectively in 1997, and returned MPs in 7 seats that had never before voted Conservative. The centre of gravity for the 2019 Conservative intake is Sheffield, nearly 100 miles North of the previous centre of the parliamentary party in Buckingham.

The Labour Party is now most visibly the party of younger people, diverse groups and residents of global cities. 37 of the 50 safest Labour seats by majority are now within the metropolitan boundaries of Britain's four largest cities: London, Birmingham, Manchester or Liverpool. The party of the workers now trails the Conservatives among every social grade, including skilled and unskilled workers, and every educational class aside from those with degrees. A steeper age curve, rather than Brexit, was the driver behind rising support from ethnic minorities and renters.

The implications for this Parliament and the next election are considerable. The Conservative Party's coalition is more economically interventionist and more culturally traditional than it has been for some time. Voters of all parties were resigned to the idea that taxes would rise and it would become harder for them to get by if the Conservatives won, albeit the economy and national security would be better protected than under Labour. This creates conditions conducive to higher tax and spent, which have likely been exacerbated by the coronavirus pandemic, and stronger policies on crime, immigration and security. The wider implications of the events since the election - a global public health crisis, the deepest recession in many decades and sharply rising unemployment - are yet to be fully appreciated.

The Labour Party that Keir Starmer inherited is janus-faced, torn between a traditional working class base and a new radical coalition that increasingly drags it towards economic statism and identity politics. While this coalition represents the future, in that it is mostly young, its ideas have a limited circulation and its reach amounts to just 37% of the population as a whole. Even under a maximalist left-liberal coalition, we estimate that Labour could only ever generate around 260 seats at the ballot box. The new Labour leadership should take note.

The prospects of the country's smaller parties depend on these decisions. The Conservatives' appeal to Leave voters cut the feet from underneath the Brexit Party, decreasing their support from nearly 10% to 2% over the course of the campaign. Likewise, the Liberal Democrats did not succeed in their attempt to "own" the Remain vote and declined from 16% to 12% over the course of the campaign. It would be remiss to write off the party however, given the changing

electoral geography and rising marginality of the South East. The SNP's vote grew but not by as much as expected. Without the burning platform of Brexit, their prospects will depend on whether they face a united, or a divided, unionist vote.

But the success, or failure, of either main party will be determined by their ability to forge a coalition in the common ground of British politics, which at this point in time (and arguably for most of the post-war period) is slightly to the left on economics and slightly to the right on social and cultural issues. Excluding Brexit, this was the defining values-mix of Boris Johnson's supporters, just as it was for the coalitions of successful Prime Ministers before him. If the next election is to bear less volatility and more certainty, it will be because party leaders of all kinds will have finally understood this basic truth.

# A gamble

*The context for the election*



The 2019 General Election will go down as one of the great gambles of recent political history. At the time the election was called, “Don’t Know” led all of the political parties in the polls and partisan attachment was lower than at any point since records began. In the most recent national election – the European elections in May – more than 7 in 10 voters had voted for a different party than in 2017. Younger and older voters were further apart than at any point in history.<sup>1</sup>

The unpredictability was compounded by the fact that voters had not cast their ballots in a general election in the month of December since 1923.<sup>2</sup> The risks were high for both the governing Conservatives, who had never before increased their vote share three times in a row, and the Labour Opposition. Before the campaign, polls predicted that the biggest winners would likely be the Liberal Democrats and the Brexit Party.

In the end, the Parliament that broke most constitutional conventions was brought to an end by an election that undid most electoral precedents. Boris Johnson’s gamble paid off and he delivered a political realignment that many thought impossible after the shortcomings of the 2017 campaign. This chapter outlines the key questions that framed the contest at the outset. The next five chapters explore how the landscape has changed, what happened during the campaign, the way voters split, and the implications for British politics going forward.

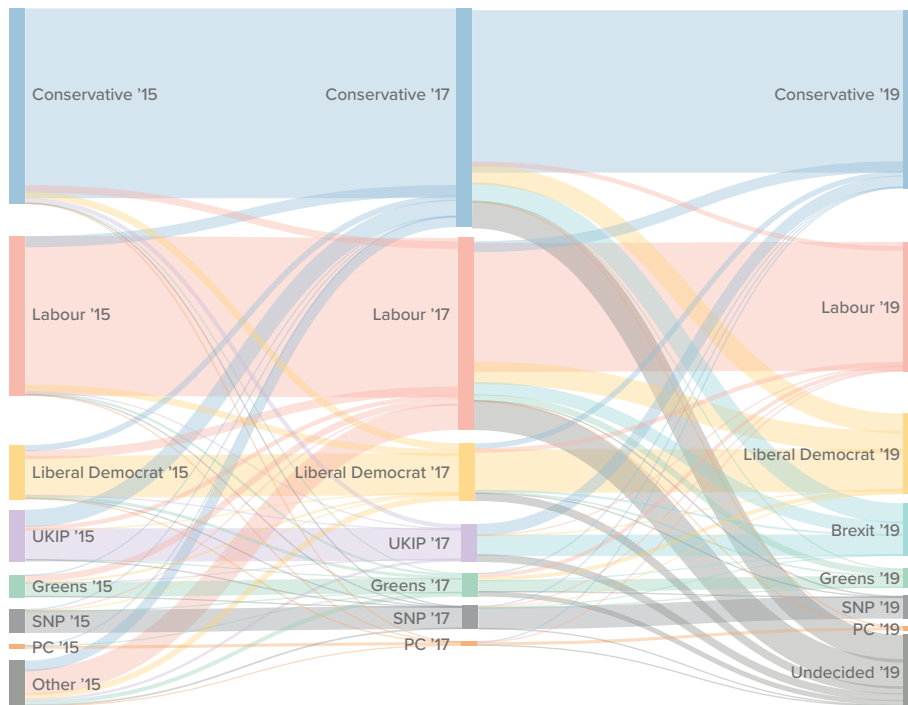
## A growing detachment from parties

The return to two party politics in 2017 – with Labour and the Conservatives securing the highest two party vote share (83%) since 1970 and nine in ten seats on the green benches – obscured the underlying instability of both parties’ coalitions before the 2019 election.

- Britain went to the polls in December with party loyalty at a lower ebb than it has ever been. The share of voters switching their vote between general elections quadrupled between 1966 and 2017, from just over one in ten voters (13%) to more than four in ten (42%). An even higher proportion (49%) switched their support over the three general elections between 2010 and 2017, and just under a third (31%) of Conservative supporters switched to Labour in 2017, the highest level since 1964.<sup>3</sup>
- Old tribal loyalties were increasingly being replaced by identities forged in the summer of 2016. At the outset of the 2019 election, 86% of voters identified with either Leave or Remain, compared to just 68% with any political party. When asked about the strength of this attachment, 51% identified very strongly with their referendum identity, compared to just 15% who very strongly identified with their party affiliation.<sup>4</sup>
- Of these dual political identities, Labour’s Leave vote proved the most fragile. The British Election Study estimated that 30% of Labour voters in 2017 voted to Leave the EU a year before. By the start of the 2019 campaign, this had fallen by two thirds, with just 10% of Labour voters having supported Leave, and the others fleeing to other parties.<sup>5</sup>

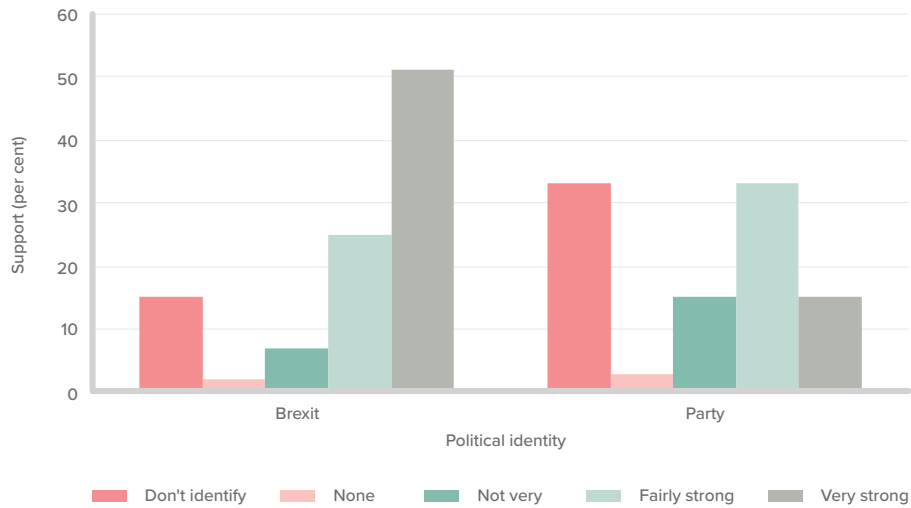
- An opposite, if not as severe, shift took place among Conservatives in the two years prior to 2019. In 2017, 23% of Conservative voters were 2016 Remain voters, equivalent to 3.1 million votes. By the time of the 2019 campaign started, this had fallen to 18%, and only 63% of 2017 Conservative voters who supported Remain were loyal to the party.
- Partisanship was so weak in October 2019 that voters' affiliation to any party (35%) was surpassed by political agnosticism: those saying they were neither a supporter of, nor close to, any political party (39%). The growing detachment of voters from parties suggested that there would be substantial churn in the 2019 election, but the impacts of this volatility were unclear.

**Figure 1: Individual level volatility in voting intention, 2015 to 2019 election**



*Source: Onward analysis and Hanbury Strategy polling.*

**Figure 2: Comparison of the strength of Brexit and Party identifiers**



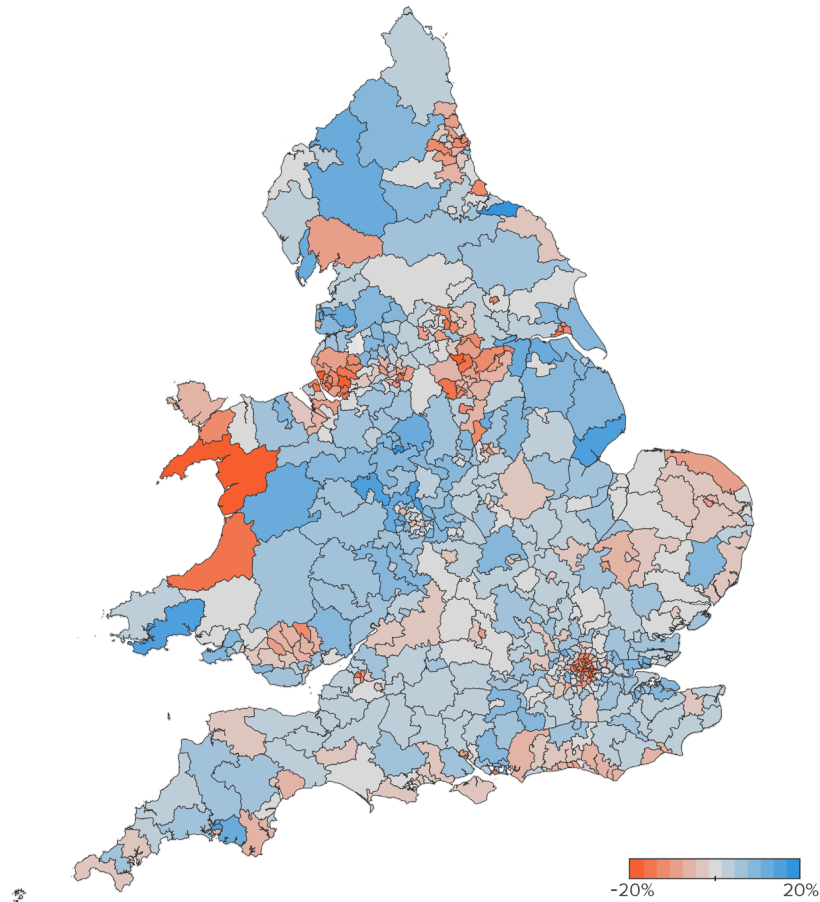
*Source: YouGov, 7th–11th November 2019.*

## Britain's changing electoral geography

The disillusionment of once tribal voters and salience of Brexit identities heralded an historic redrawing of the electoral map. In 2017, the Conservatives tried and failed to break through in Labour's Northern and Midlands heartlands. The success or failure of the 2019 campaign depended on whether anything had changed.

- The Conservatives had an opportunity to rectify their historic under-performance in many working class seats that voted to Leave. As James Kanagasooriam has written, the “red wall” constellation of constituencies from Clwyd on Wales' West Coast to Grimsby on England's eastern edge were all seats that statistically could return Conservative majorities according to their demographic characteristics, but have not done so because of cultural factors.
- In a similar vein, Onward's own research on the eve of the election campaign identified “rugby league towns” as the bellwether seats and “Workington Man” as the archetypal swing voter for the Conservatives.<sup>6</sup> There was a healthy degree of overlap between both categories, reflecting the opportunity the Conservatives had to redraw the political map.

**Figure 3: Conservative over-performance and under-performance compared to demographic predictions, 2017 election**



*Source: Onward analysis, House of Commons Library and ONS data.*

- This reflected the increasing urbanity of Labour voters. A third of Labour voters (32%) lived in the centre or on the edge of a city and a further 16% lived in the centre of a town. Of the remainder, 36% live on the edge of towns and 16% live in villages or the countryside. 37 of the 50 safest Labour seats by majority were within the metropolitan boundaries of Britain's four largest cities: London, Birmingham, Manchester or Liverpool. Only one of the safest 50 Conservative seats was in a major city.<sup>7</sup> This contrasts with a Conservative vote in which just a quarter (24%) of voters live in cities and 9% in the centre of towns. The vast majority of Conservatives – 67% – live in villages (24%) or on the edge of towns (43%).<sup>8</sup>

- Only a few years ago, the heart of the Conservative Party might reasonably have been described as well-off Kensington – as the home of David Cameron’s “Notting Hill set” and a seat that, in various incarnations, consistently returned Conservative MPs since its creation in 1974. In 2019, Kensington was a Labour-held marginal with a strong Liberal Democrat challenge. Labour has similarly seen its heartlands crumble. Tony Blair’s old mining seat of Sedgefield has delivered safe Labour candidates since 1931; today, the Conservatives hold it with an 11% majority.
- This movement is partly a result of Brexit, but other factors play a role. As psephologists like Rob Ford and Ian Warren have pointed out, Labour Remain voters outnumbered Labour Leave voters in all but one Labour constituency ahead of the 2019 election. Most Leave voters had simply already left Labour by the time of the 2017 election.<sup>9</sup> This is not to say that a Labour Leave collapse was not consequential – of the 50 most marginal Labour-held seats before the 2019 election, 35 had voted to Leave in the referendum and all had majorities of fewer than 4,300 votes – but its effect could be overstated.
- It is therefore a mistake to see the 2019 election in isolation. It was a continuation of a geographical and philosophical resorting of the electoral map that has been visible for some time – in which Labour is becoming more metropolitan and the Conservatives are increasingly rooted in a provincial, town-based worldview.

## What does the 2019 General Election result mean?

To explore whether the 2019 election was the moment when these trends broke through and remade new political coalitions, Onward partnered with Hanbury Strategy on two large-sample polls.

The first of these was conducted over the first full weekend of the campaign (9–11 November) with a representative sample of 4,000 respondents. Headline vote intention in the first poll was Conservatives 36%, Labour 29%, Liberal Democrat 16% and Brexit Party 9%, in line with other polls at the time. The second, conducted over the final full weekend of the campaign (6–8 December) with a larger sample of 8,000 (to accommodate respondent attrition) asked the same sample of respondents the same survey, with results weighted to the final election result.

Unlike most election polls, we not only asked about vote intention and party leaders’ popularity, but also questions about values, policies and priorities, overlaid with characteristics such as where people lived, their education background and property tenure. Examining voter sympathies and attitudes at the start and end of the campaign, we aimed to explore a number of key questions, including:

1. Was 2019 the moment when the realignment in British politics crystallised – or is the volatility we have experienced merely temporary?
2. What is the new electoral composition of each of the new parties, how different are they from their old bases, and how fragile are the coalitions that each of the parties have assembled?

3. Which policy issues and values were most influential in the election, and which affected the fortunes of parties and key electoral groups, in the run up to polling day?
4. What does this realignment mean for Britain's electoral geography and the likely prioritisation of issues in the new Parliament?
5. Where do each of Britain's political parties go from here?

The following sections explore these questions in turn. The results have considerable implications for our politics.

# Realignment

*How the landscape changed*



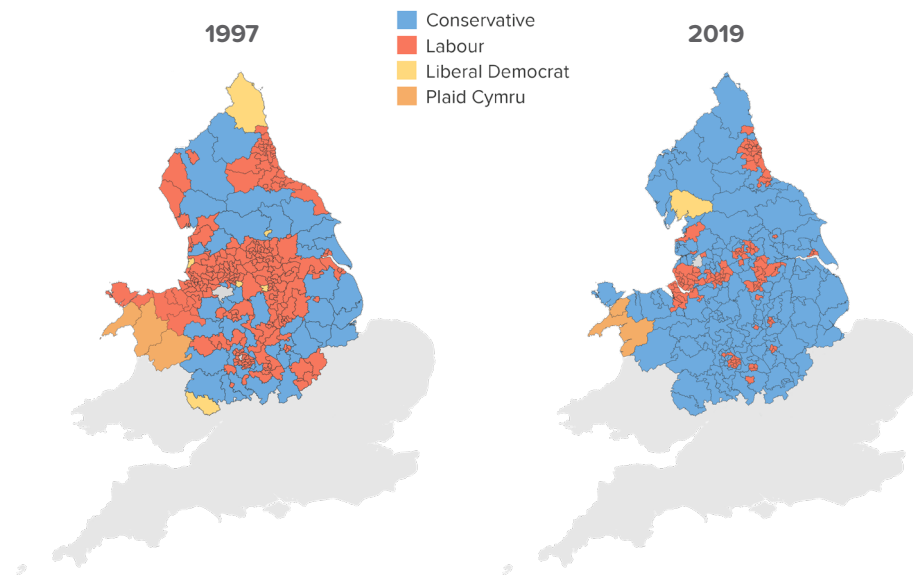
On 11.30pm on Thursday 11 December 2019, Blyth Valley defied sixty years of political history and expectations to vote Conservative. The former mining town in Northumbria had not returned a Conservative candidate since its creation in 1950. Two decades earlier, in 1997, its retiring MP, Ronnie Campbell, had recorded an 18,000 majority and pushed the Conservatives into third place.

Two hours later Workington followed and a redrawing of the political map few thought possible was confirmed. The realignment that became visible on 11 December 2019 was – at face value – historic. The Conservatives had won 45% of the vote across Great Britain as a whole, returned candidates in 8 seats that had never before voted Conservative, and taken three quarters of Midlands and two fifths of Northern seats, compared to a quarter and a tenth respectively in 1997.<sup>10</sup>

The Labour Party had been defiantly rejected by voters in many of its traditional heartlands, suffering negative swings of more than 15% in Dudley North, Bassetlaw and Redcar. The party of workers saw their vote share among every social grade, including skilled and unskilled workers, and all lower qualified educational classes fall below the Conservatives. 2019 was the first time in British electoral history that a governing party had increased its vote share at three successive general elections.

It was an evening that changed the centre of gravity in British politics. But what actually happened? What was driving the change? Was it merely fed up constituents lending their votes, as the Prime Minister has said, or was 2019 the visible manifestation of a permanent rotation that is likely to continue at future elections?

**Figure 4: Constituencies in the North and Midlands, by winning party, 1997 and 2019**



*Source: Onward analysis, House of Commons Library data.*

**Table 1: Headline results from the 2019 election**

	Conservative	Labour	Liberal Democrats	SNP	Green Party	Brexit Party	Plaid Cymru
<b>Headline Result (GB)</b>	45%	33%	12%	4%	3%	3%	0%
England	47%	34%	12%	–	3%	2%	–
Scotland	26%	16%	10%	47%	1%	0%	–
Wales	37%	43%	5%	–	0%	4%	11%
<b>Gender</b>							
Male	45%	31%	13%	4%	2%	2%	1%
Female	45%	35%	11%	4%	3%	1%	0%
<b>Brexit</b>							
Leave	71%	15%	4%	2%	1%	5%	0%
Remain	23%	47%	20%	5%	3%	0%	1%
<b>Region</b>							
North East	38%	46%	7%	–	2%	5%	–
North West	38%	46%	9%	–	1%	4%	–
Yorkshire and the Humber	41%	40%	9%	–	3%	6%	–
West Midlands	53%	34%	9%	–	3%	1%	–
East Midlands	57%	31%	7%	–	1%	3%	–
East of England	58%	22%	14%	–	3%	1%	–
London	31%	47%	16%	–	4%	2%	–
South East	53%	24%	17%	–	5%	0%	–
South West	56%	24%	15%	–	4%	0%	–
<b>Best Prime Minister</b>							
Boris Johnson	85%	3%	6%	1%	1%	3%	0%
Jeremy Corbyn	1%	80%	9%	6%	3%	0%	1%
Don't know	10%	34%	35%	10%	7%	2%	1%

*Source: Onward analysis, Hanbury Strategy polling, wave 2.*

This chapter sets out the results from our detailed polling at the start and end of the 2019 General Election. While Brexit was clearly important, our data confirms the thesis that the election outcome can be explained by an underlying political rotation in which the loyalties and demographic markers that once defined voting patterns are being broken down and reconstituted. We find that:

- Age not only continues to be the most important indicator of vote intention, but generational voting patterns are becoming more entrenched over time. The tipping point at which a voter is more likely to vote Conservative is now 43, and fewer than 17% of voters over 65 will even consider voting Labour.
- The profound attitudinal gap emerging between those with degrees and those with low levels of education, which was the clearest predictor of a voter's support for Leave, has grown since the 2016 referendum. This divides the country on a much broader set of issues than Brexit, including economics, social policy and attitudes to democracy itself.
- Traditional concepts of Left and Right are now obsolete. They are replaced by new political tribes shaped by socio-cultural values and to some extent exacerbated by Brexit. The common ground of British politics seeks economic order and cultural attachment. This is increasingly true of the Conservative Party base, which now represents a much less liberal coalition than it once did. Labour represents a base that favours an uncomfortable mix of economic statism and social liberalism.
- The effects of these changes and wider demographic trends have fundamentally altered Britain's electoral geography. Labour's Red Wall is a pile of rubble. The Conservatives hold a greater share of seats in the North and Midlands than at any point since 1935, and the highest vote share since 1970. They also won 41% of the original Northern Rugby League towns, up from 9% in 2017. Labour held their position in London and the South East, keeping as many seats as in 2017, which was more than in any election since Blair's 1997 landslide.

The factors that unlocked this unprecedented shift are complex. In the following pages we disaggregate the different elements that played a role in the election result, and how they affected different people in different places.

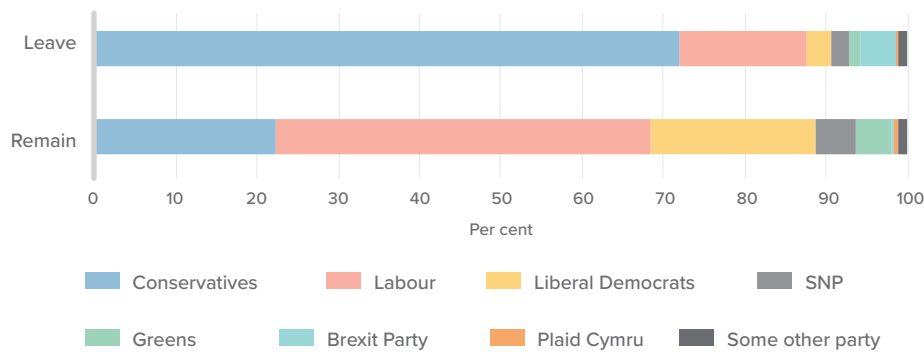
## The long shadow of the referendum

The political strategies of both main parties attempted to unite different sides of the Brexit debate. Only one side was successful in doing so.

- On polling day, 72% of Leave voters supported the Conservatives, a 14 percentage point increase from the first weekend of the campaign (57%). This increase largely came from the Brexit Party, whose share of the GB Brexit vote fell from 19% to 4% during the campaign. Labour's share of Leave voters rose marginally from 14% to 16%.

- The legacy Remain vote was considerably more disaggregated. On December 12, Labour won the votes of 47% of Remain voters, a rise of 6 percentage points from the start of the campaign (41%). These votes primarily came from former Liberal Democrat voters, whose Remain vote share fell by six points to 20% during the campaign, rather than the Conservatives, whose vote share actually rose two points to 22% on polling day.
- The consolidated leave vote helped push many constituencies into voting Conservative for the first time in their history. Of seats that changed hands, there was a strong correlation between the size of the swing to the Conservatives and the level of support in the constituency.<sup>11</sup> Seats such as Bassetlaw and Redcar saw a swing of 18% and 15% respectively to the Conservatives, in part due to the fact that nearly seven in ten voters in the constituency supported Leave.
- Comparatively, seats which the Conservatives lost were some of the most Remain-leaning in the country. In East Renfrewshire an estimated 74% of voters supported Remain in the referendum, and the Conservatives lost the seat with a 9 point swing against them, losing 5% of their own vote share. In Labour's only gain of the night, Putney, Remain support was an estimated 72% in 2016; the Conservatives lost 8% of their vote share, and in turn lost the seat.

**Figure 5: Party composition of Remain and Leave voters, wave 2**



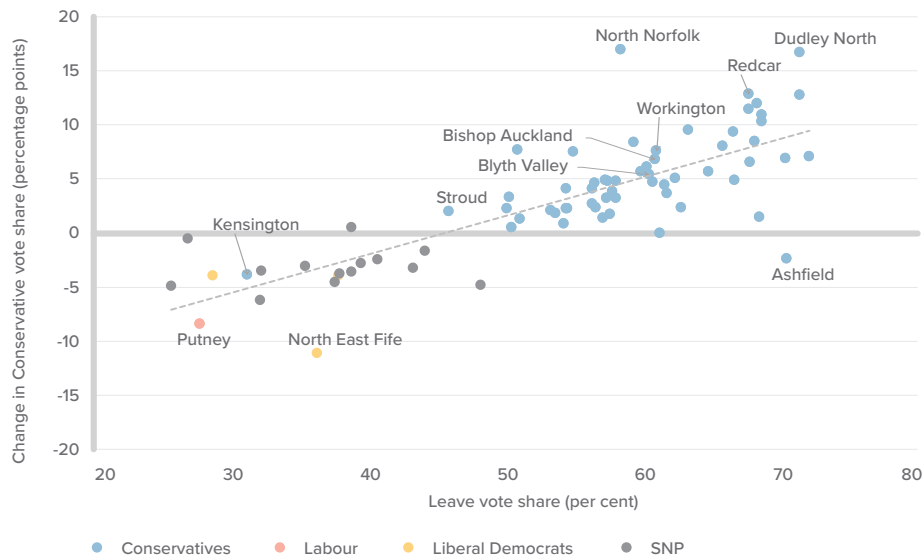
Source: Onward Analysis, Hanbury Strategy polling, wave 2.

Note: This analysis excludes those who did not vote in 2019.

- This was a consistent trend across the country. Whilst the Conservatives saw their vote share increase substantially in areas that backed Brexit, with an average vote share increase of 8.8 percentage points in the top 20 most Leave-leaning seats, the opposite was true in the most Remain-leaning seats, where their vote share decreased by 2.9 percentage points on average.

- Looking across all constituencies that were estimated to lean towards Remain, the Conservatives saw their vote share fall by an average of 2.3 points. In these seats the dynamics of a split Remain coalition can be seen most clearly: the main non-Conservative Party also saw its vote share decline by an average of 1.8 points. Comparatively, in Leave-leaning seats the Conservative party saw its vote share increase by an average of 5.1 percentage points, and the main Conservative party in the seat saw its vote decline by an average of 10.0 percentage points.
- The strong relationship between voting leave and a high swing towards the Conservatives, suggests that Brexit was a significant force in driving realignment, giving a once-in-a-generation impetus for people to reconsider their previous loyalties, and to switch the party that they chose to support.

**Figure 6: Increase in Conservative vote share and leave vote share, seats that changed hands**



Source: *Onward analysis, GE 2019 results and estimates from Hanretty, C, (2017).*

**Table 2: Estimated leave vote share and swing to/from the Conservatives, Top 20 Leave and Remain constituencies**

Top 20 Remain Seats			Top 20 Leave Seats		
Constituency	Estimated Leave vote share	Change in Conservative vote share	Constituency	Estimated Leave vote share	Change in Conservative vote share
Hackney North and Stoke Newington	20.5%	-0.7%	Boston and Skegness	75.6%	+13.1%
Streatham	20.5%	-5.3%	Walsall North	74.2%	+14.2%
Bristol West	20.7%	-2.1%	Clacton	73.0%	+11.0%
Islington North	21.6%	-2.3%	South Basildon and East Thurrock	73.0%	+9.3%
Glasgow North	21.6%	-4.2%	Kingston upon Hull East	72.8%	+5.5%
Edinburgh North and Leith	21.8%	-8.7%	Castle Point	72.7%	+9.5%
Battersea	22.0%	-5.5%	Stoke-on-Trent North	72.1%	+7.0%
Edinburgh South	22.2%	-3.3%	Doncaster North	71.7%	+5.2%
Vauxhall	22.4%	-1.9%	Great Yarmouth	71.5%	+11.6%
Hackney South and Shoreditch	22.8%	-0.1%	Great Grimsby	71.4%	+12.7%
Dulwich and West Norwood	22.9%	-3.1%	Dudley North	71.4%	+16.6%
Hampstead and Kilburn	23.7%	-8.2%	Stoke-on-Trent South	71.1%	+13.1%
Tottenham	23.8%	+0.1%	South Holland and the Deepings	71.1%	+6.0%
Lewisham Deptford	24.4%	-2.3%	Barnsley East	71.0%	+0.3%
Manchester Withington	24.9%	+0.7%	Mansfield	70.9%	+17.3%
Hornsey and Wood Green	25.0%	-3.7%	Ashfield	70.5%	-2.4%
Tooting	25.6%	-4.8%	Dudley South	70.4%	+11.5%
East Renfrewshire	25.7%	-4.9%	Bolsover	70.4%	+6.9%
Brighton Pavilion	25.9%	-1.7%	Dagenham and Rainham	70.3%	+3.9%
Bermondsey and Old Southwark	26.1%	+3.6%	Wentworth and Dearne	70.3%	+3.8%

*Source: Onward analysis, GE 2019 results and estimates from Hanretty, C, (2017).*

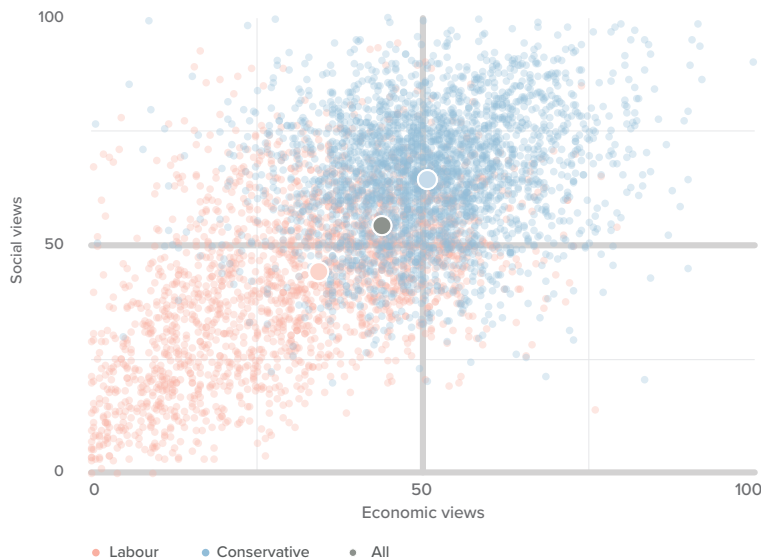
## The traditional coalitions of the two main parties were changing

- While Brexit was clearly important, it was accompanied by a much longer-term weakening of the bonds that tied the coalitions of different parties together. This was visible as the campaign began, when 9% of prior Conservative voters were planning to defect to the Liberal Democrats and 8% to the Brexit Party. Labour's coalition was splitting 9% to the Liberal Democrats, 7% to the Brexit Party and 6% to the Conservatives.
- The fracturing of both main parties was mitigated by new voters from elsewhere. At the start of the campaign, the Conservatives were expected to take 6% of their coalition from Labour. The latter's coalition was expected to be boosted by people who did not or could not vote in 2017, making up 14% of its projected coalition. This built on previous churn: of voters sticking with each party, 10% of Conservatives were 2015 UKIP (6%) or Labour (4%) voters and 17% of Labour voters did not vote in 2015 (11%) or voted for Lib Dem or Greens (3%).
- The Liberal Democrats stood to gain 9% of all voters from the Conservatives and Labour, whereas the Brexit Party stood to benefit from approximately 7% of all voters defecting. In total, nearly one in five voters were intending to defect from the main parties to challenger parties and half (49%) of Liberal Democrat and two-thirds (66%) of Brexit Party support came from attrition from Labour or the Conservatives. However only 35% of Liberal Democrat voters and 36% of Brexit Party voters said they would definitely vote for each party at the beginning of the campaign. A quarter (25%) of Brexit Party voters began the race expecting they may change their mind.
- At the end of the campaign little had changed in terms of this overall composition of support. A slightly smaller proportion of Conservative voters had supported the party in 2017, down from 79% to 74%. This mainly reflected the growing levels of support from people voting Conservative for the first time. Even as the total number of Conservative voters increased over the course of the campaign, the proportion of Conservative supporters who had previously voted for the Labour party grew from 6% to 8%, and the proportion who had previously voted for UKIP grew from 2% to 6%.
- In total, over a quarter (26%) of Conservative 2019 voters had not supported the party at a previous election, with the equivalent figure being a fifth (20%) for the Labour Party and two-thirds (67%) for the Liberal Democrats. The traditional coalition that had carried the Conservatives in previous elections had fundamentally changed.

## The centre of gravity of British politics has moved

- The traditional dichotomy of left and right has been disintegrating for some time but the 2019 election marked a clean break with the idea that voters hold consistently right or left wing views across both social and economic dimensions. Instead, voters hold more fluid values across each domain and, naturally, opted to support parties that appealed to a combination.
- In fact, the average voter appears to be slightly to the right of centre on the economy and slightly to the left of centre on socio-cultural issues. In numerical terms, 33% of our sample was located in the top left quadrant (economically interventionist and socially authoritarian), 28% are in the top right quadrant (economically liberal and socially authoritarian), and 29% are in the bottom left (economically interventionist and socially liberal). Just 9% of voters hold consistently economically and socially liberal views.
- This means that the more liberal positions of both established parties are increasingly at odds with many voters. The Conservative Party chimes with a majority of voters on socio-cultural issues given its traditional focus on law and order, family and community, but more economically liberal instincts are out of step with the common ground of British politics. The inverse is true of the Labour Party, which combines some synergy on economic issues but social liberalism that is sharply at odds from most voters.
- There is much greater synergy on economics than culture. The voting coalitions of every political party are marginally economically left-wing, including the Conservative and Brexit Party coalitions. On socio-cultural issues, Liberal Democrat and Labour voters are generally liberal while Brexit Party and Conservative voters are more authoritarian.

Figure 7: Political axis, all respondents by vote intention, wave 2



Source: Onward Analysis, Hanbury Strategy polling, wave 2.

- The British Social Attitudes Survey has shown for some time that voters are willing to see taxes rise to fund public services. Our results expose the extent to which the public is increasingly comfortable with an economic agenda which focuses on promoting stability and belonging, rather than one that is defined by rolling back the frontiers of the state.
- Among all voters, 52% say they “favour increased taxation, bigger government and more spending on public services”, compared to 48% who say they would prefer “lower taxes, smaller government and less spending on public services”. More than half (56%) of voters believe that “the time of austerity is over, the government should be prepared to spend and borrow more” compared to 44% who think “we haven’t made enough progress on debt and deficit reduction”.
- It is notable how willing people are to pay higher taxes for better funded public services. Two thirds (65%) of people say they would be “happy to personally pay more tax if it meant more money going to public services like the NHS”, compared to 35% who say they would not be happy to pay higher taxes to support the NHS. The same proportion (65%) agree that government should “prioritise spending for schools, hospitals and social care” over “cutting income tax” (35%). Nearly three quarters (71%) of all voters, and more than two thirds of every age group, believe that “the NHS urgently needs more funding and I think higher taxes should pay for this.”
- However the willingness to pay higher taxes is conditional. While 54% of people support a government that focuses on economic growth over one that prioritises the environment, only a third of voters (31%) agree “it is necessary for people like me to pay higher taxes and change my behaviour to help tackle climate change”.
- There is strong support for economic interventionism. Seven in ten voters (68%) prefer a government that regulates more rather than less. Three fifths (59%) would prefer a society or government that focuses on reducing the gap between rich and poor than works for faster economic growth. 64% of people would prefer government to encourage businesses to retrain workers in this country than allow businesses to bring in skilled workers from abroad. 51% of voters think the Government should prevent advertising of harmful products.
- The issue of government spending and deficit reduction has gained far greater importance, given the outbreak of Covid-19. Our polling indicates that there was already significant appetite for fiscal expansion and intervention in the economy. The Budgets in March and July are partly a reflection of this. Indeed, the Prime Minister recently claimed that the Government would “not go back to the austerity of 10 years ago.”<sup>12</sup>

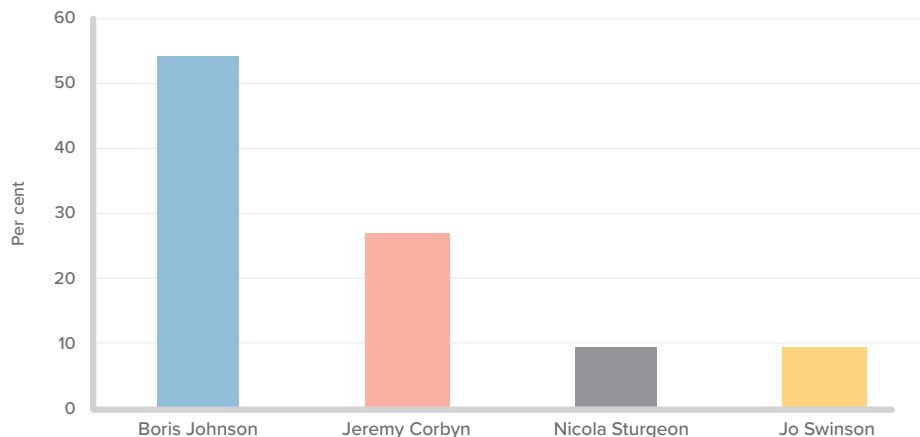
On socio-cultural issues, voters exhibit a desire for cultural attachment and social authority rather than a desire for greater liberty or choice. This is at sharp odds with the liberalising social policies that parties of all colours have pursued for some time, and represents a significant break from the post-war consensus.<sup>13</sup> We find:

- 71% of people say that “it is more important to have order in society” rather than “it is more important that people are free to act as they wish” (29%). Nearly three fifths (57%) believe “it is more important to look out for the common good” than “it is more important to protect individual rights” (43%). More than half (56%) believe that “the best guarantee of your rights and freedoms are the history and traditions of the country you live in” rather than those written into international law.
- This does not mean people are not meritocratic. 63% of people believe “there are always opportunities in this country if you’re willing to work hard enough to take them” compared to 37% who think “opportunities in this country are limited to too few people.” A similar proportion (64%) would prefer a government that encourages people to take more responsibility for themselves than one that encourages people to take responsibility for looking after others.
- Voters are tough on crime but not on culture. 62% of voters say they “favour more jail time for criminals” compared to 39% who think the justice system should be more about rehabilitation than punishment. 75% of voters would prefer a society or government that focuses on law and order rather than protects personal privacy. However, just 31% of voters – and a minority of every age group – believe that marriage should always be between a man and a woman, and more than two thirds (69%) believing that same sex couples should have the same rights as anyone else.

## Brexit and Jeremy Corbyn sunk Labour's chances

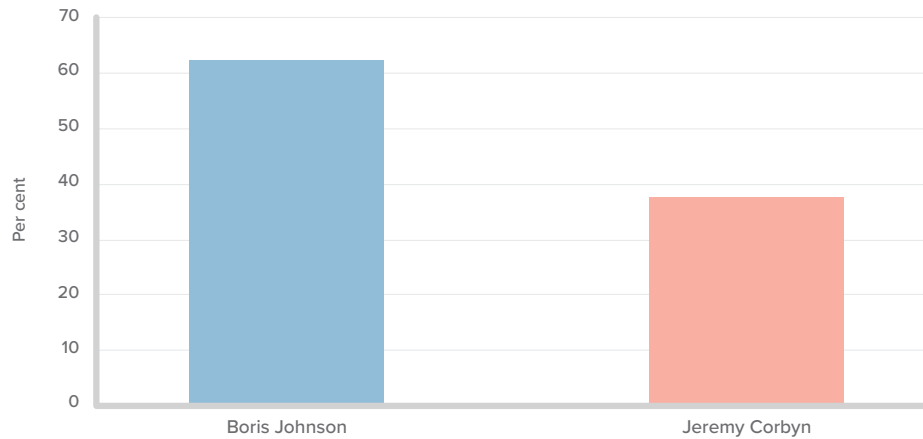
- At the beginning of the campaign, half of voters (53%) thought that Boris Johnson was the best candidate to lead the UK (excluding don't knows). This was more than double the share who favoured Jeremy Corbyn (23%), who was only ten points ahead of Jo Swinson (13%). When asked to choose between Boris Johnson or Jeremy Corbyn, 64% chose Boris Johnson, compared to 36% for Jeremy Corbyn.
- There was no clear gender breakdown for party leader support. Boris Johnson was seen as the best candidate by 54% of men compared to 53% of women, while Jeremy Corbyn was equally unpopular (23% favourability) for both genders. There was however clear difference between party voters: 5% of Labour voters thought that Boris Johnson was the better person to lead the UK, compared to barely 1% of Conservatives who thought Jeremy Corbyn was better placed. Just 77% of Labour voters thought Jeremy Corbyn was the best leader for the country; 99% of Conservative voters thought Boris Johnson was best.
- The election campaign did little to shift these underlying perceptions. At the end of the campaign, over a quarter of respondents (26%) expressed no opinion on the best leader. Of those who did, 54% thought Boris Johnson was the best leader and only 27% favoured Jeremy Corbyn. Jo Swinson had fallen to 9%. In a head to head, Boris Johnson led 62.5% to 37.5%.

Figure 8: Best leader, excluding don't knows, wave 2



Source: Onward Analysis, Hanbury Strategy polling, wave 2.

## Best 9: Best Prime Minister, excluding don't knows, wave 2



Source: *Onward Analysis, Hanbury Strategy polling, wave 2.*

- Both leadership candidates split opinion among the electorate but Jeremy Corbyn was considerably more unpopular than Boris Johnson. 41% of voters had only positive views of Boris Johnson, thinking he was either fair, honest, trustworthy, strong, effective, or patriotic, compared to 24% for Jeremy Corbyn. This compares to 35% who had only negative views about Boris Johnson, seeing him as incompetent, divisive, weak or dishonest, compared to 55% for the Labour leader. Only 8% of respondents thought that both men had a positive characteristic.
- When specific word associations were drawn, 37% thought Boris Johnson was dishonest, compared to 29% for Jeremy Corbyn. However, 38% of voters felt Jeremy Corbyn was incompetent, compared to 30% for Boris Johnson. A quarter (23%) of respondents thought that Boris Johnson was patriotic, five times the number (4%) for Jeremy Corbyn. A fifth (19%) of voters viewed Boris Johnson as effective and a quarter (25%) viewed him as strong, compared to 6% and 7% respectively for the Labour Leader.

Figure 10: Perceptions of Boris Johnson and Jeremy Corbyn, wave 2



Source: Onward analysis, Hanbury Strategy polling, wave 2.

- The most common reason driving vote choice was support for the party that best reflected a voter's values and principles (30%). This values voting was stronger among Labour voters (39%) than the Conservatives (22%). 19% of voters chose their party on the basis of policies. Among this group, Labour (45%) also led the Conservatives (38%).
- 20% of voters chose the party that was most likely to deliver Brexit. The Conservatives won almost nine in ten (88%) of these voters on polling day, an improvement on just under a third (63%) at the start of the campaign (drawn largely from the Brexit Party). In total, 39% of total Conservative voters did so primarily to deliver Brexit. Only 2% of Labour voters indicated the same.
- Only 8% of voters chose their party on the basis of who was most likely to stop Brexit with a further 4% on the basis of the party most likely to deliver a second referendum. Labour did gain ground among these voters, from 30% to 40% over the campaign, but 42% remained with the Liberal Democrats, splitting the Remain vote.
- Of those who voted on the basis of the party's leader (8% of total voters), almost three quarters (71%) voted for the Conservatives. Only 22% of those who said that this was their main reason supported the Labour Party.

## Age remains a crucial dividing line

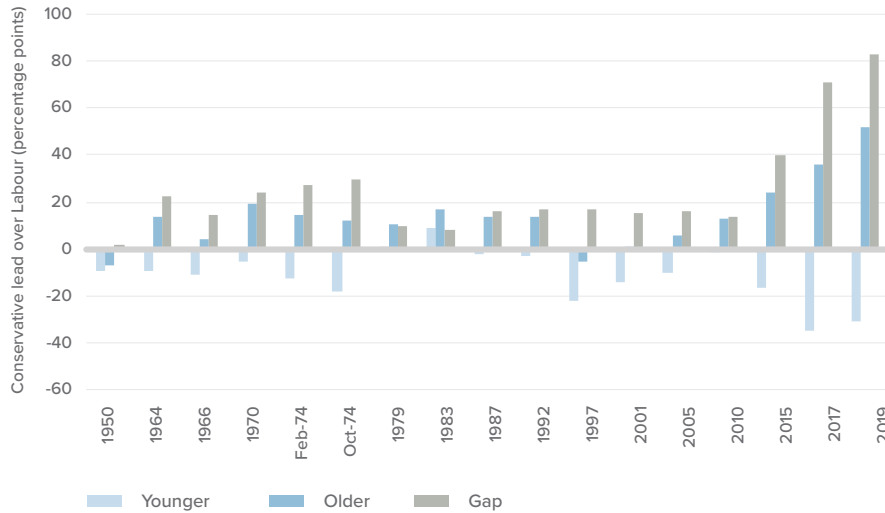
If the 2017 general election was the moment the generational voting gap first became fully visible, the 2019 election was the moment it became the defining feature of our political landscape.

- Among 18–24 year olds, just 24% voted Conservative while 55% voted for Labour. 10% voted for the Liberal Democrats and just over 1% voted for the Brexit Party. Labour led in every age group up to and including 35–44 year olds.
- Among those over 65 years old, the opposite was true: 67% of over-65s voted Conservative, against just 15.5% for Labour. Despite the Conservatives' lead on vote share, the only age groups net supportive of the Conservatives were those over the age of 45 years old.
- Excluding Don't Knows, 85% of over-65 year olds believed Boris Johnson would be the best Prime Minister. Among voters under the age of 35 years old, 57% thought that Jeremy Corbyn would be the better Prime Minister. This age gap remained fairly consistent over the campaign, with the exception that Corbyn increased his lead among under-35s by three points.

Our polls at the beginning and end of the election campaign show how this age gap crystallised during the course of the race.

- Labour won a 31 point lead among 18–24 year olds in 2019, winning 55% of the vote against the Conservatives 24%. This lead was lower than in 2017, when Labour took a 35 point lead among this age group (62% to 27%) but unchanged from the lead at the start of the campaign (50% to 19%). Labour did not improve its position among young people in 2019.
- The Conservatives took a 52 point lead among over-65s in 2019, taking 67% of the vote among older voters to Labour's 15%. This older vote share was substantially higher than the start of the campaign (60%) and two years previously (63%) and also represented a wider margin over Labour compared to the start of the campaign (47 points) and in 2017 (38 points).
- This was unsurprising given Labour's reputation among older voters as the campaign started. 19% of over-65s said they were certain or likely to vote for the Labour Party at the start of the campaign, compared to 65% for the Conservatives and 26% for the Liberal Democrats. Voters aged 18–24 were more equivocal: 33% were certain or likely to vote for Conservative, 61% for Labour and 43% for the Lib Dems.

**Figure 11: Conservative lead over Labour by younger and older voters, and the gap inbetween**



Source: *Onward analysis, Ipsos Mori, Butler et al, Nuffield Election Studies and Hanbury Strategy polling, wave 2.*

Note: Due to breaks in the series and the lowering of the voting age in 1970, “younger” means 18–24 after 1970, 21–24 in 1964 and 1966, and 21–29 in 1950; “older” means 65+, except in 1979 and 1983 where it is 55+.

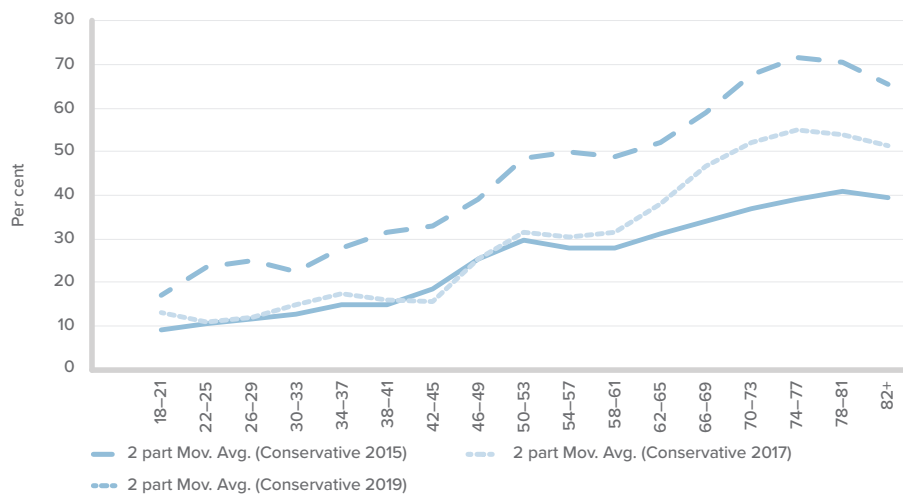
The effect of this is that the age curve, which has been tilting upwards since 2015, has become steeper. This means that in our sample:

- The tipping point age – the average age at which the probability of voting Conservative exceeds the probability of voting Labour – was 43 in 2019, compared to 47 years old in 2017 to 51 years old in 2018. During the course of the campaign it remained steady at this level. The reason for this fall was primarily due to declining support for the Labour Party rather than higher levels of Conservative support among young people. Labour support among 25–34s, for example, fell from 57% in 2017 to 51% in 2019.
- The Conservatives have a conversion problem among younger voters. Among 18–24 year olds, 33% started the campaign willing to consider voting for the Conservatives, and the proportion “certain” to vote Conservative has declined from 12% to 9%. Three in ten 18–24s said that they considered voting Conservative at the start of the campaign but did not in fact vote for them on polling day. 90% of over-65s who considered the Conservatives as the campaign began voted for them on polling day, alongside a large number of older voters who had started the campaign undecided.
- Labour suffers from a consideration problem among older voters. The share of over-65s who would consider voting for Labour declined from 27% in December 2018 to 17% a year later, with the number certain to vote Labour falling from 15% to 10%. Of the 17% of over-65s who considered voting for Labour as the campaign began, three-quarters actually voted for them.

Similarly, 75% of 18–24 year olds who expected to vote Labour did so and a further 17% of 18–24 year olds who started the campaign undecided came to Labour during November and early December.

- The declining popularity of the Labour Party meant that the “tipping point”, the age at which a voter was more likely to vote Conservative than Labour fell from 52 in 2017 to 43. This was less due to improved performance by the Conservatives amongst younger voters, and more due to precipitous drops in support for Labour. Other studies of the tipping point have found a similar trend, with YouGov using a slightly different method and finding that the tipping point fell from 47 to 39.<sup>14, 15</sup>

**Figure 12: The age profile of Conservative vote intention – 2015, 2017, 2019**



Source: Onward analysis, British Election study 2015 and 2017 and Hanbury Strategy polling, wave 2.  
 Note: Moving average across two two-year age groups to account for fluctuations due to small sample size in individual age groups.

- Younger women continue to vote disproportionately for Labour. For those over the age of 35, women and men voted for the Conservatives in roughly equal numbers, but nearly two thirds (63%) of 18–24 year old women voted Labour, 43 points ahead of the Conservatives (19%). Of this group, 9% voted Liberal Democrat and 2% voted for the Brexit Party. Similarly, 69% of 18–24 year old women believed that Jeremy Corbyn would be a better Prime Minister, compared to 31% for Boris Johnson.
- Among 18–24 year old women, Jeremy Corbyn was seen as a better Prime Minister than Boris Johnson on every issue, taking a 43 point lead on healthcare, a 42 point lead on welfare benefits, a 35 point lead on tax and a 31 point lead on housing. This is sharply at odds with older women, where Boris Johnson is seen as a better Prime Minister on every issue, including a 54 point lead on Brexit, a 66 point lead on defence and security, a 58 point lead on the economy and a 57 point lead on crime.

**Figure 13: Proportion of each age group that considered voting or did vote for each party, by age and gender**



Source: Onward analysis, Hanbury Strategy polling, wave 2.

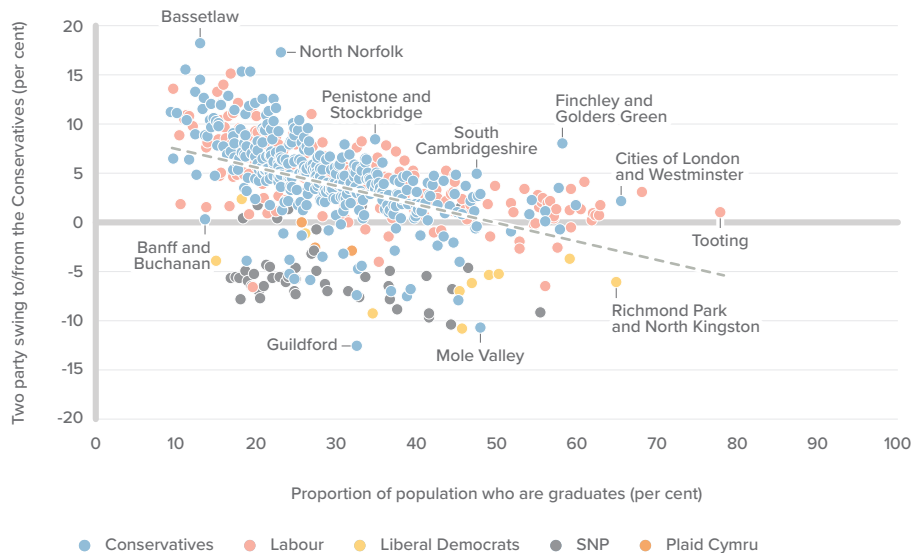
Notes: Unlike other figures in this report the vote intention figures do not exclude “don’t knows” and “would not votes.” This is because comparison to all of those who considered voting for the party requires that these groups are also included in the vote intention figures.

## Education opportunity has replaced class as the key social division in the country

Education opportunity is fast becoming one of the most important divides in British society. In 2016, three quarters (75%) of voters with postgraduate qualifications voted in favour of Remain, while a similar proportion (73%) of those who left school without any qualifications voted for Leave. A year later, the Conservatives led by 17 points among those with no qualifications and Labour led by 15 points among graduates. In 2019:

- The Conservatives (59%) led Labour (22%) among those with no qualifications by 37.7 points but trailed by 5.5 points among graduates. This represented a Conservative improvement from the start of the campaign, when the Conservatives had a 27 point lead among those with no qualifications but trailed by 9 points among graduates. The Liberal Democrat vote share among graduates fell from 22% to 16%, while the Brexit Party's vote share among those with no qualifications fell from 12% to 5% and among those with A Levels from 7% to 2%.
- The educational divide had a material impact on the election result. There was a strong negative correlation between the density of graduates in a constituency and the level of swing to the Conservatives. Seats in which people have lower qualifications such as Bassetlaw and North Norfolk, for example, both benefited from an 18% swing towards the Conservatives, while seats with higher numbers of graduates, such as Richmond Park and North Kingston, saw a 6 point swing away from the Conservatives.

**Figure 14: Swing to or from the Conservatives, by density of graduates in each constituency**



Source: Onward analysis, Hanbury Strategy polling, wave 2.

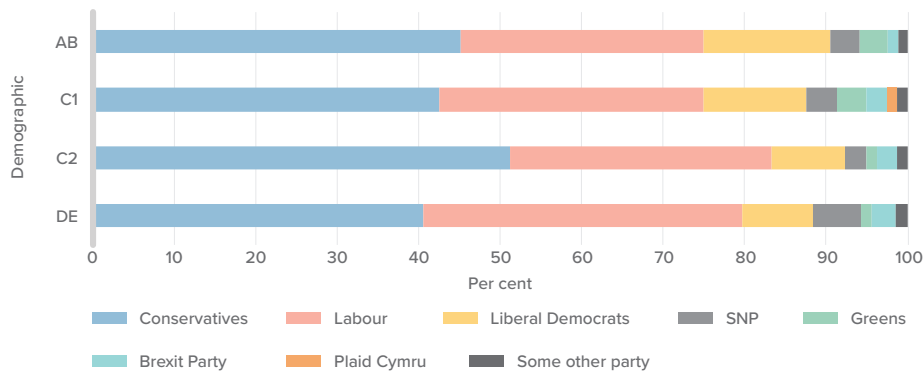
- As Onward found in *Generation Why?*, the education divide in vote intention is to some degree a function of age, given far higher numbers of young people going to university than previously. For example, the Conservatives have a lead of 18 points among degree holders over the age of 55 years old, despite trailing by 28 points among graduates under-35 years old. Similarly, Labour leads by 27 points among young people educated to GCSE-level or below but trails by 50 points among older, less educated voters.
- Combining both age and education reveals that the young graduate vote is more consolidated under Labour than the older, less educated vote is under the Conservatives. The Conservatives only took 4 in every 10 older voters without a degree, while Labour won the support of 1 in every two young graduates.

**Table 3: Vote intention by age and qualification level**

	Under-35, has degree	55+, has degree	Under-35, GCSE or lower	55+, GCSE or lower
Conservative	24%	46%	26%	67%
Labour	52%	27%	53%	17%
Liberal Democrat	14%	17%	4%	7%
Green Party	4%	2%	3%	2%
Brexit Party	1%	2%	3%	3%
Other	4%	6%	10%	4%
CON lead over LAB	-28%	18%	-27%	50%

- This battle between the “grads” and “grad nots” is more important a dividing line than social grade, although the Conservatives’ lead over Labour among every social grade is notable. 51% of C2 voters supported the Conservatives, compared to 34% for Labour and up 4 points from 2017. More notably, 41% of DE voters supported the Conservatives, the same proportion as in 2017 but 2 points higher than Labour.
- At the start of the campaign, the Conservatives led Labour across AB, C1 and C2 voters, while Labour maintained a 2.5 point lead among DE voters. By the end of the campaign, 9% of these working class voters had swung to the Conservatives, largely from the Brexit Party. The 22% of AB voters who had begun the campaign intending to vote Liberal Democrat split between other parties, with 2% going to the Conservatives and 4% to Labour.

Figure 15: Vote intention by social grade



<p><b>Conservatives total: 13,966,454</b>                      AB: (30.03%) 4,194,126                      C1: (28.32%) 3,955,300                      C2: (23.83%) 3,328,206                      DE: (17.83%) 2,490,219</p>	<p><b>Labour total: 10,269,051</b>                      AB: (27.24%) 2,797,289                      C1: (29.48%) 3,027,316                      C2: (20.27%) 2,081,537                      DE: (23.03%) 2,364,962</p>
<p><b>Liberal Democrats total: 3,696,419</b>                      AB: (40.28%) 1,488,918                      C1: (30.36%) 1,122,233                      C2: (16.12%) 595,863                      DE: (13.22%) 488,667</p>	<p><b>SNP total: 1,242,380</b>                      AB: (27.93%) 346,997                      C1: (28.32%) 351,842                      C2: (15.73%) 195,426                      DE: (28.00%) 347,866</p>
<p><b>Greens total: 865,715</b>                      AB: (36.50%) 315,986                      C1: (34.55%) 299,105                      C2: (14.23%) 123,191                      DE: (14.73%) 127,520</p>	<p><b>Brexit Party total: 644,257</b>                      AB: (21.24%) 136,840                      C1: (30.00%) 193,277                      C2: (22.51%) 145,022                      DE: (26.21%) 168,860</p>
<p><b>Plaid Cymru total: 153,265</b>                      AB: (12.57%) 19,265                      C1: (54.75%) 83,913                      C2: (19.88%) 30,469                      DE: (12.57%) 19,265</p>	<p><b>Some other party</b></p>

Source: Onward analysis, Hanbury Strategy polling, wave 2.

# Campaign

*Movements, messages, and issues*



At the start of the campaign many foresaw the foundations for Conservative victory.<sup>16</sup> But few, if any, predicted the scale of realignment that took place on 11 December. The YouGov MRP, which in 2017 famously predicted a hung parliament, returned a margin of error that put the final number of Conservative seats at anywhere between 311 and 367.<sup>17</sup> What happened during the unpredictable 37 day campaign to deliver such a decisive result?

This chapter looks at voter movements during the campaign using polls conducted on the first weekend and at the end of the campaign. Using our own MRP conducted on the first weekend, we can identify which seats were held, won and lost during the campaign.<sup>18</sup> According to our data:

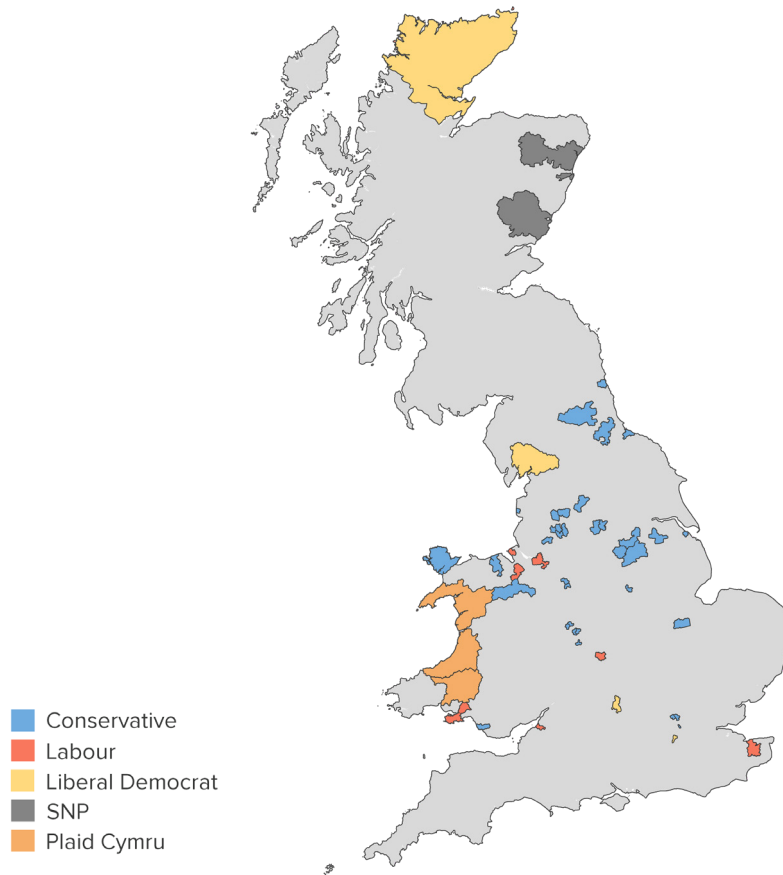
- The Conservatives started the campaign projected to win 355 seats. Over the 6 week campaign the party gained a net +10 seats to 365. However this increase obscures considerable churn: the Conservatives in fact converted 24 seats over the campaign, but simultaneously lost 14 constituencies (see table below).
- The Labour Party began the 2019 campaign projected to win 217 seats. This was a 45 seat loss on the party's 2017 result. Over the course of the campaign this fell to the party's eventual tally of 202 (excluding the speaker), following the loss of 22 seats during the course of the campaign and 7 gains. Many of the seats lost during the campaign were located in the Red Wall.
- Of the other parties, the Liberal Democrats converted four seats during the 2019 campaign that they were not projected to win at the start. However, four seats also moved away from them, resulting in a net draw. In Scotland, the SNP converted six seats but lost two during the campaign.

**Table 4: Total number of seats predicted at the beginning of the campaign and the end of the campaign, and distribution of seat gains**

	Predicted seat total, start of campaign	Seats converted during the campaign	Seats lost during the campaign	Final seat total, election day	Difference
Con	355	+24	-14	365	+10
Lab	217	+7	-22	202	-15
Lib Dem	11	+4	-4	11	–
BXP	0	+0	-0	0	–
SNP	44	+6	-2	48	4
Green	1	+0	-0	1	–
PC	3	+1	0	4	1

*Source: Onward and Focaldata analysis, Hanbury Strategy polling data, wave 1 and wave 2.*

## Seats won and lost during the campaign period



- The Conservative campaign was extremely successful at converting Labour voters in the North and Midlands. While Bishop Auckland, Bassetlaw, Bolsover and Keighley were all projected to return Conservative MPs when Parliament prorogued in November, a large number of seats, including Blyth Valley, Dewsbury, North West Durham, Redcar and Workington, all fell during the campaign itself. In total over half of the seats in the Red Wall were won during the campaign.
- These seats saw the Conservative vote share rise considerably over the course of the campaign. In seats that converted during the election itself, Conservative vote share rose by 11.3 percentage points between the start and end of the campaign. The average vote share on election day was 45.3%, 15 points higher than in 2017. This was due to an average swing from Labour of 8.1%, nearly double the 4.1% swing projected in these seats at the start of the campaign. The Brexit Party vote share in these seats fell by 8.4 points over the course of the campaign.

- The seats the Conservatives lost during the campaign, by contrast, were concentrated in Scotland or in liberal and heavily Remain areas such as Canterbury, Putney, and St. Albans. In these seats, the Conservatives experienced a 2.4 point increase in their vote over the campaign, but this was offset by an average 11.6 percentage point increase by the challenger party over the campaign. It is notable however that in these seats the Conservatives achieved, on average, 97% of their 2017 vote share in 2019.

**Table 5: Seats that the Conservatives won, and lost, during the campaign**

Constituency	Seats won during the campaign					
	Predicted vote share			Predicted swing		
	Start of campaign	End of campaign	Percentage point change	Start of campaign	End of campaign	Percentage point change
Birmingham Northfield	36%	46%	+10.3	+4%	+7%	+2.9
Blackpool South	35%	50%	+14.6	+3%	+9%	+6.1
Blyth Valley	33%	43%	+9.7	+6%	+10%	+3.9
Bolton North East	37%	45%	+8.4	+4%	+5%	+0.9
Burnley	30%	40%	+10.3	+6%	+10%	+3.2
Bury North	37%	46%	+9.2	+4%	+5%	+1.1
Carshalton and Wallington	32%	42%	+10.4	-3%	+2%	+4.6
Cheltenham	44%	48%	+4.0	-4%	-1%	+2.3
Dewsbury	35%	46%	+11.4	+1%	+4%	+2.9
Don Valley	33%	43%	+10.2	+4%	+10%	+6.0
Gedling	33%	45%	+12.5	+1%	+5%	+4.2
Heywood and Middleton	33%	43%	+10.1	+5%	+8%	+3.2
Leigh	31%	45%	+14.3	+6%	+12%	+6.1
North West Durham	31%	42%	+10.9	+7%	+10%	+3.2
Redcar	30%	46%	+16.1	+8%	+15%	+7.3
Stoke-on-Trent Central	36%	45%	+9.4	+6%	+7%	+1.0
Wakefield	35%	47%	+12.3	+2%	+6%	+3.7
West Bromwich East	36%	47%	+10.7	+8%	+12%	+3.7
West Bromwich West	33%	51%	+17.6	+4%	+12%	+7.5
Wolverhampton North East	34%	52%	+17.7	+5%	+12%	+7.0
Workington	33%	49%	+16.3	+3%	+10%	+6.5
Ynys Môn	30%	35%	+5.5	+6%	+10%	+3.7
Clwyd South	36%	45%	+8.7	+6%	+8%	+1.7
Bridgend	32%	43%	+11.1	+4%	+7%	+2.4

Constituency	Seats lost during the campaign					
	Predicted vote share			Predicted swing		
	Start of campaign	End of campaign	Percentage point change	Start of campaign	End of campaign	Percentage point change
Bristol North West	36%	39%	+2.7	-1%	-7%	-6.3
Canterbury	36%	45%	+9.2	-1%	-3%	-1.6
Putney	36%	36%	-0.3	-6%	-7%	-0.6
St. Albans	40%	39%	-0.8	-11%	-6%	4.8
Warwick and Leamington	37%	42%	+5.3	0%	-4%	-4.4
Westmorland and Lonsdale	42%	45%	+3.3	-1%	-2%	-0.9
Aberdeen South	34%	36%	+1.9	-10%	-8%	+1.7
Ayr Carrick and Cumnock	39%	39%	-0.5	-6%	-5%	+0.5
East Lothian	25%	27%	+1.5	2%	-2%	-3.7
East Renfrewshire	35%	35%	+0.1	-9%	-6%	+3.3
Gordon	39%	41%	+2.3	-3%	-4%	-0.8
Alyn and Deeside	39%	42%	+3.0	6%	-3%	-8.6
Gower	37%	41%	+4.3	2%	-4%	-5.5
Carmarthen East and Dinefwr	33%	34%	+1.5	4%	-4%	-8.3

Source: Onward and FocalData analysis, Hanbury Strategy polling data, wave 1 and wave 2.

Note: Two-party swing calculated with reference to the second-highest party.

- The Labour Party was unable to hold many of these seats because of its low starting point rather than movement during the campaign. In seats they lost during the campaign period, the party actually *increased* their vote share by an average 3.7 percentage points, primarily at the expense of the Liberal Democrats, whose vote share fell by 5.2 percentage points. But Labour started from such a low base – for example, three in every ten 2017 Labour voters in Blyth Valley and North West Durham had abandoned Labour by the start of the campaign – that it was unable to make up ground.
- In the seven seats the Labour Party did reclaim during the campaign, six were 2017 Labour seats and all bar one had voted for Remain in 2016. In these constituencies, the Labour Party succeeded by becoming the natural home of Remain voters in these seats, enjoying a considerably higher vote share gain during the campaign than the Liberal Democrats.
- The Liberal Democrats were predicted to win 11 seats at the start of the campaign. The Liberal Democrat campaign did nothing to increase this total, although the seats within it did change. Three out of four of the seats the campaign converted were 2017 Liberal Democrat seats (Westmorland

and Lonsdale, Caithness Sutherland and Easter Ross, and Edinburgh West), with St Alban's the only true gain. In all but one of these seats, the Liberal Democrats benefitted from a decline in the Conservative vote.

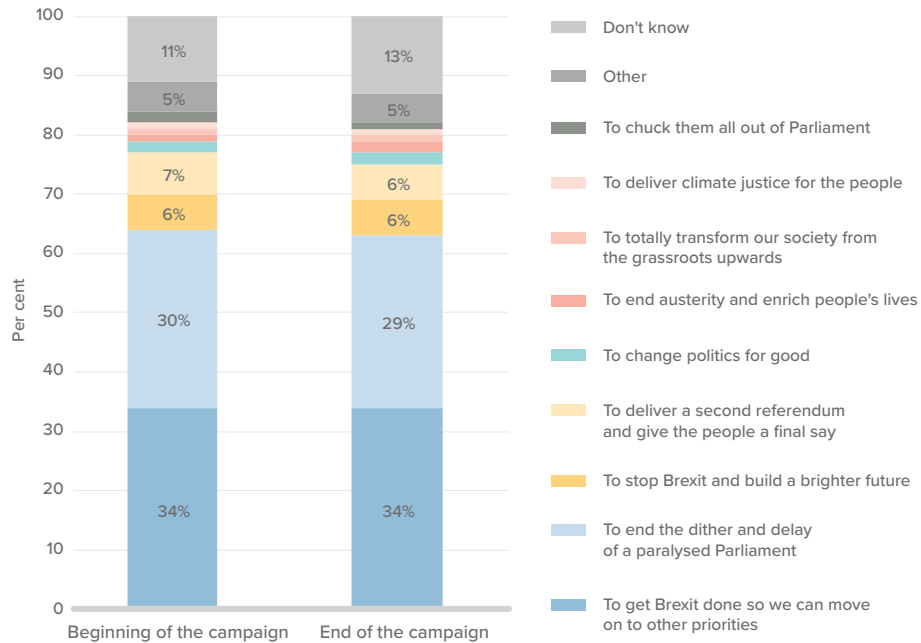
- By contrast, the Liberal Democrats lost Cheltenham, Sheffield Hallam, Carshalton and Wallington and Jo Swinson's East Dunbartonshire having expected to win these seats at the start of the campaign. In Cheltenham and Sheffield Hallam, the party actually lost vote share as the campaign progressed, while in the latter two they were leapfrogged by the Conservatives and SNP respectively.
- The Scottish National Party converted six seats expected to be held by other parties. Of these seats, four (Aberdeen South, Ayr, Carrick and Cumnock, East Renfrewshire and Gordon) were held by the Conservatives in areas that were estimated as having extremely strong levels of support for Remain (ranging from 55% to 74%). In seats they converted, the SNP increased their vote share during the campaign by just over 12%.

## The strength of the Conservative campaign

The Conservatives not only started the campaign in a commanding position, but ran a campaign that was extremely effective at improving the party's standing further amongst voters, especially in the so-called Red Wall of Northern and Midlands seats. This came down to a number of key factors: message discipline, issue salience and leader ratings.

- The Conservatives successfully framed the election around a number of key issues with a high level of salience for voters. Three-fifths (60%) of voters felt that "Getting Brexit done" or "ending the dither and delay of a paralysed parliament" was the primary reason for the election. In a sign of Labour's inability to seize the initiative, this figure did not change between November and December 11th.
- Only 3% of the population believed that the election was being fought to transform society, end austerity or deliver climate justice – reflecting the complete failure of the Labour Party to reframe the election on their own terms. By the end of the campaign, this had increased to 4%. This was three times lower than the 12% of voters who viewed the election as primarily about either "stopping Brexit" or "delivering a second referendum," the core Liberal Democrat messages.

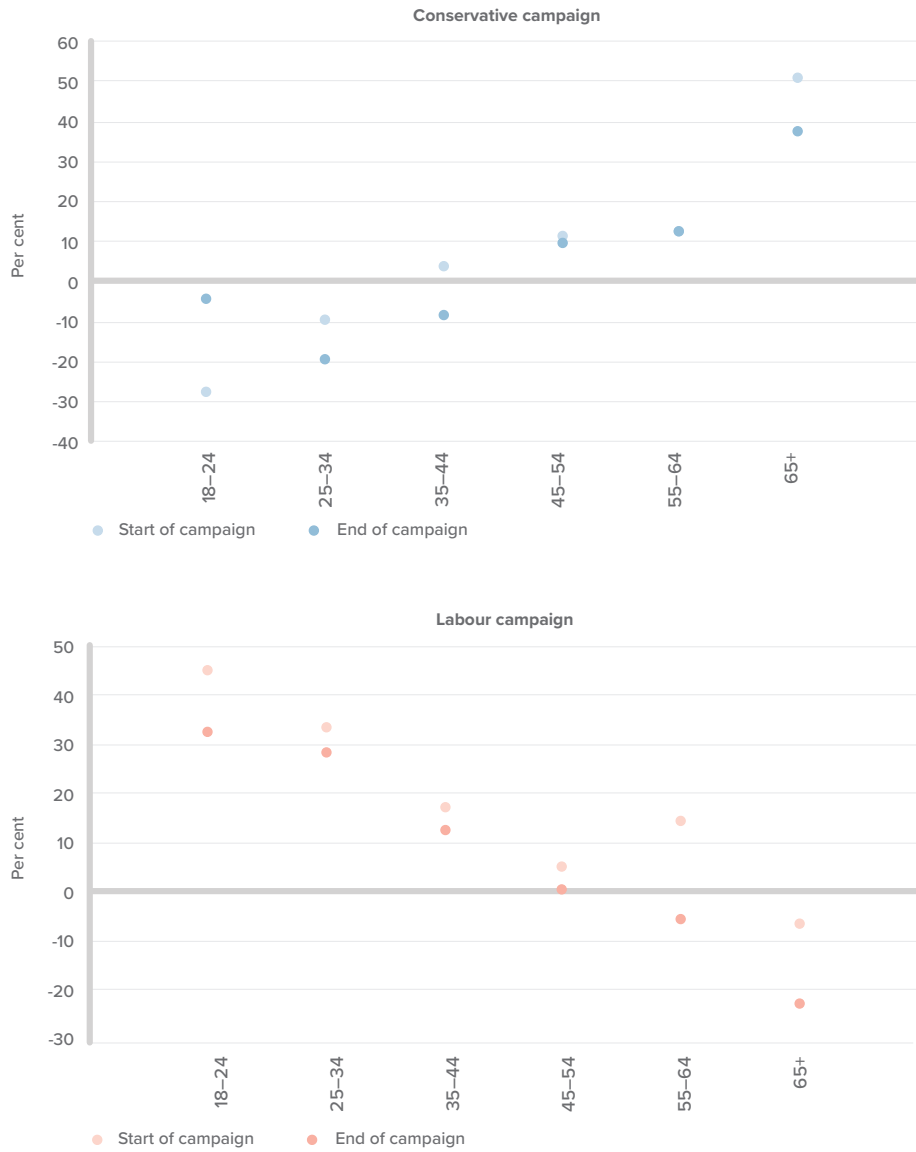
**Figure 16: Statements that best reflected respondents views on why the UK was going to an election, beginning and end of the campaign**



Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave.

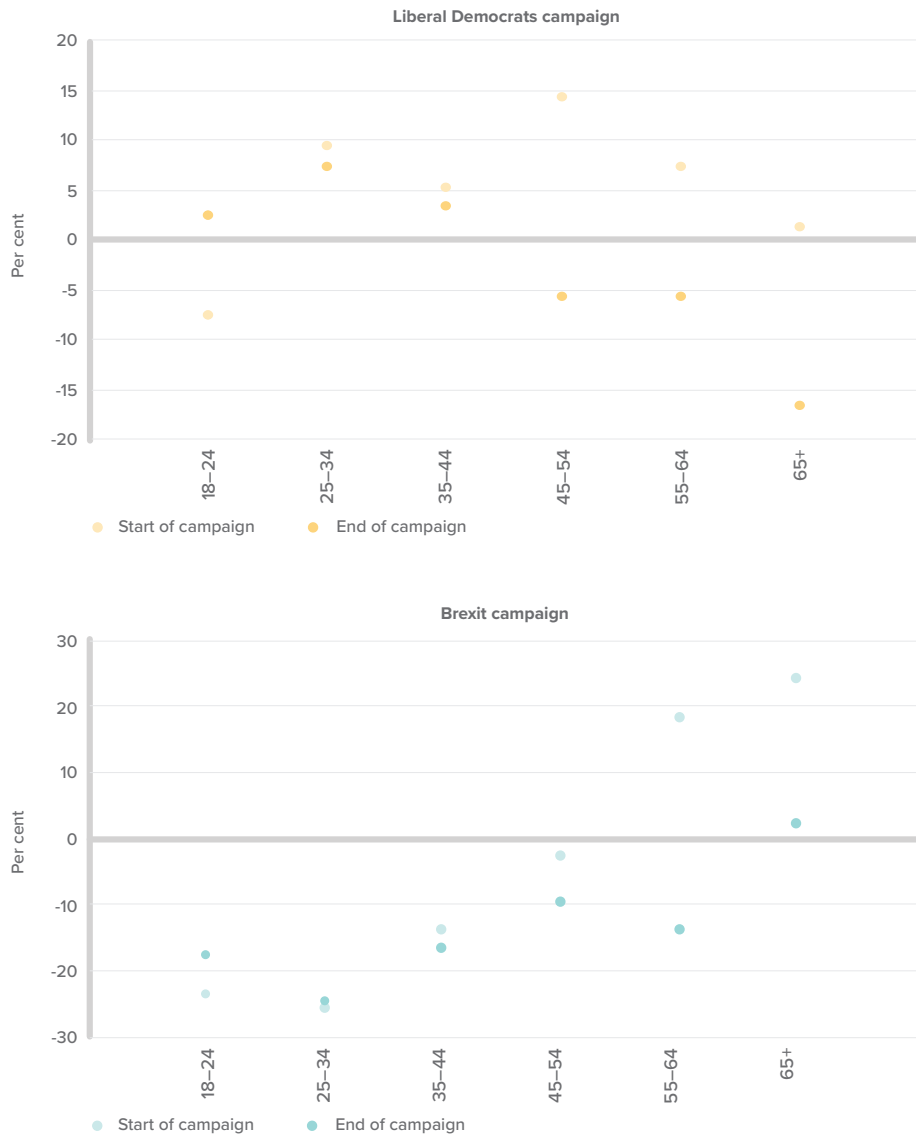
- The Conservatives' publicity and messaging appears to have had significant traction with older voters. By the end of the campaign, net positivity of the contact and messages was +37% among over-65 year old voters, although this is down from +50% at the beginning of the campaign. However, the Conservatives appear to have lost ground among voters aged 35–44, whose net positivity fell from 3% to -9%, and 25–34s (down ten points to -20%). 18–24s became more favourable towards Conservative messages, with net positivity rising from -28% to -5% at the end of the campaign.
- Younger voters had substantially more positive views of Labour's campaign and messaging. On polling day, Labour's positivity score among 18–24s was +32%, compared to +28% for 25–34 year olds and 12% for 35–44 year olds. However, perceptions of Labour's messaging declined across almost every age group, including a 5 point drop among 45–54 year olds (+5% to 0%) and a 30 point drop among 55–64s, from +14% to -16%.

Figure 17: Views of campaign contact and messages, net positive/negative



Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

Figure 18: Views of campaign contact and messages, net positive/negative

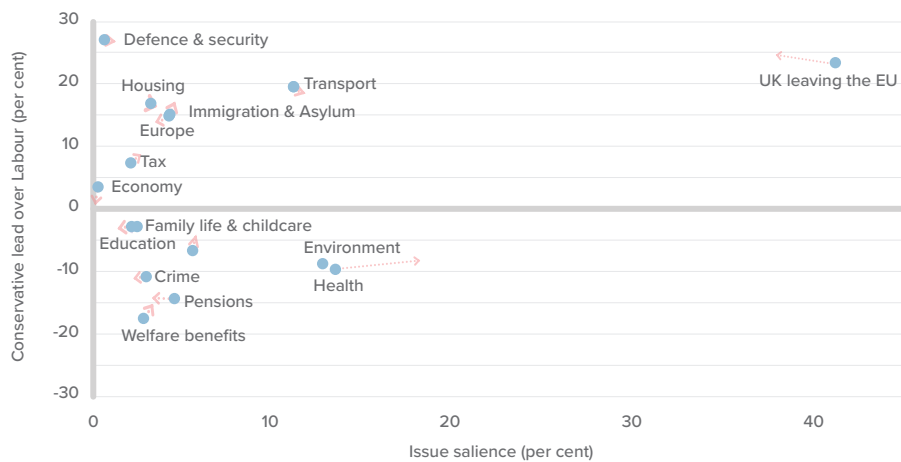


Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

- The strength of the Conservatives' messaging reflected the fact that Brexit was by far the most important issue to the electorate. 41% of voters said it was the most important issue for deciding their vote, a figure that only fell marginally to 38% by the end of the campaign. This was twice as important as the next two most important issues: health (18%) and the economy (11%).

- The Conservatives held a commanding lead of 25 points on the issue of Brexit. Only on Defence and Security, where they led by 27 points, did they have a stronger lead. The Conservatives were also more trusted than Labour on Immigration, Europe, the Economy, Crime, Tax, and Transport.
- By contrast, Labour held a 10 point lead on health at the start of the campaign, although this narrowed to 8 points by polling day, as well as education, the environment, welfare benefits, pensions, education, family life, and housing. However, excluding Health, these were all relatively low salience issues – for example, the environment was a priority for only 6% of voters in 2019.
- Once again, age appeared crucial to this distribution. Amongst all voters the Conservatives maintained a lead on more policy areas, and a slightly higher average lead. However, amongst younger voters the Conservatives lost to Labour on every issue. Amongst older voters the opposite was also true.

**Figure 19: Issue salience and Conservative lead on issues, beginning and end of the campaign**



Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

**Figure 20: Best party by issue and age, beginning and end of the campaign**

Respondents were asked to rate which party they felt was better on a suite of issues, ranging from 0 (Conservatives), to 10 (Labour).

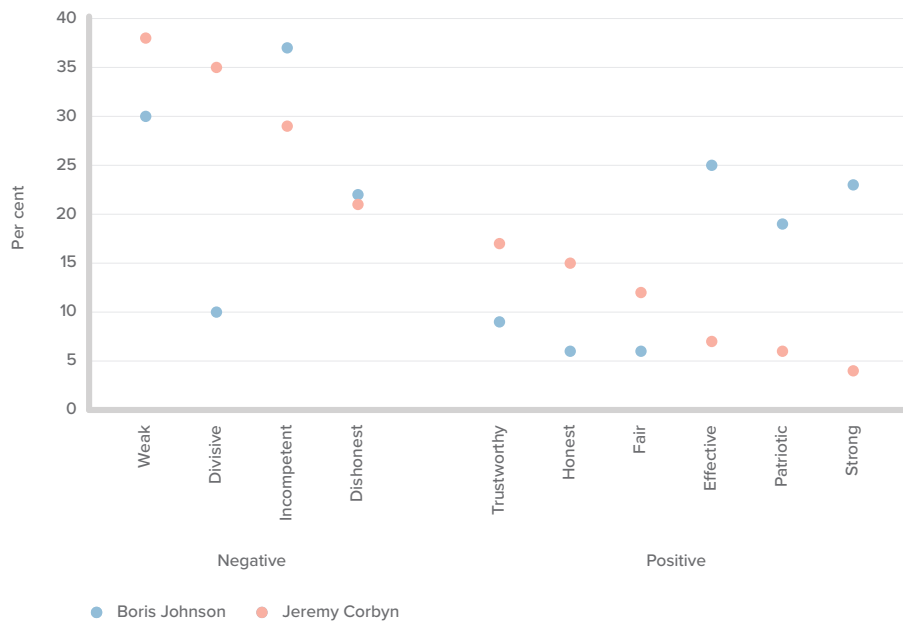


Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

The final factor was party leadership. While both candidates were viewed as having strengths and weaknesses, Boris Johnson was viewed as a much stronger leader (25% to 7%), a much more patriotic leader (23% to 4%) and a much more effective leader (19% to 6%).

- Jeremy Corbyn was viewed as marginally more fair (17% to 9%), more trustworthy (12% to 6%) and more honest (15% to 6%). Both men were viewed as dishonest by over a quarter of voters (Boris Johnson – 37%, Jeremy Corbyn – 29%), and were viewed as equally divisive (Boris Johnson – 22%, Jeremy Corbyn – 21%). Jeremy Corbyn was also viewed as incompetent by nearly four in ten voters (38%), compared to Boris Johnson’s 30%.
- The single biggest difference in leadership characteristics was weakness. Over one third of respondents (35%) characterised Jeremy Corbyn as weak, three times the number (10%) who thought the same of Boris Johnson.

**Figure 21: Words that describe each party leader: proportion of respondents describing Boris Johnson and Jeremy Corbyn with each word, beginning and end of the campaign**



Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

# Swing voters

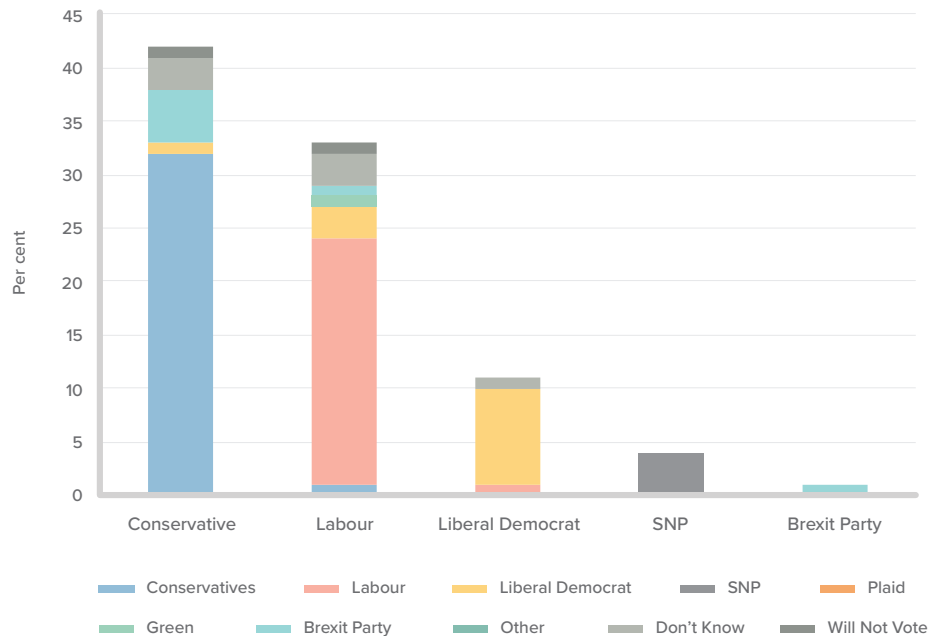
*Which voters made an impact, where, and why?*



Issues and campaigns are important in elections. But more important is a deep understanding of the people you are pitching to: the electorate. This chapter considers which voters contributed to the final election result, and the extent to which they moved during the campaign. In summary, we find:

- The Conservatives successfully won over a large proportion of Brexit Party voters, converting 71% of Brexit Party supporters between the commencement and end of the campaign. This accounted for 12% of total support and 4% of total voters on polling day.
- Around 35% of Don't Knows (DKs) and Will Not Votes (WNVs) voted for the Conservatives, confounding expectations that this group would break predominantly for Labour.<sup>19</sup> This represented 4% of total voters and 12% of Conservative votes.
- Notably, there were very few voters who switched between Labour and the Conservatives during the campaign itself: they had mostly already abandoned Labour. Around 6% of Labour votes came from the Liberal Democrats. The Brexit Party's vote halved over the campaign.

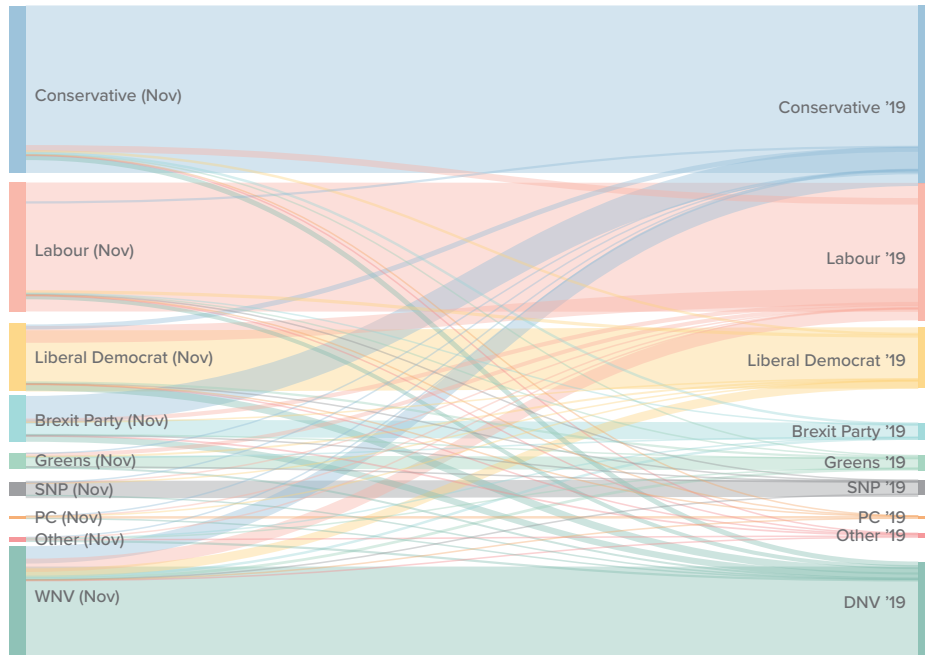
**Figure 22: Composition of each party's supporters, by vote intention at the beginning of the campaign**



Source: Onward Analysis, Hanbury Strategy polling, wave 1 and wave 2.

Note: Weights used reflect weighting to the results of the 2019 election. Attrition in the pooled sample between two waves means vote totals may not exactly reflect the final result.

**Figure 23: Vote intention movements between the beginning and the end of the campaign**



Source: Onward Analysis, Hanbury Strategy polling, wave 1 and wave 2.

## How specific groups voted in 2019

- At the beginning of the election campaign Onward identified “Workington Man” as the archetypal swing voter in 2019. These voters were typically White, male, had voted to Leave, did not have a degree, and were most concentrated in the North and the Midlands. In 2015, 42% had voted for the Conservatives, rising to 56% in 2017. Two years later, a striking 66% voted Conservative (rising to 77% if excluding those who did not vote in the election). Only 11% voted for Labour.
- A similar pattern is visible among Labour leavers, who voted Labour in 2015 and Leave in 2016. In 2017, only 10% of these voters backed the Conservative Party, demonstrating the stickiness of pre-existing party loyalty. However after two years of Brexit wrangling and with a new Conservative leader, 26% of this group supported the Conservatives. With attrition to other parties, this meant that just under a half of Labour Leavers abandoned Jeremy Corbyn in 2019.
- Among Conservative Remainers, who had voted Conservative in 2015 and Remain in 2016, the opposite is true. In 2017, 84% had backed Theresa May. Two years later, under two thirds (59%) did so. This means that the Conservatives retained considerably more Remainers than Labour did Leavers. Given that many Tory Remainers voted for the Liberal Democrats, the impact on seat allocation was more limited.

**Figure 24: Composition of voting behaviour amongst key voter groups in the 2015, 2017 and 2019 elections**



Source: Onward Analysis, Hanbury Strategy polling, wave 1 and wave 2.

- Whilst Labour atrophied support amongst its traditional working-class base, it maintained a strong lead amongst BAME voters; leading the Conservatives by 45 points amongst this group (63% support for Labour compared to 18% support for the Conservatives). However, this was still a decline from 2017 where the high level of Labour support meant that they led the Conservatives by 56 points.
- Part of the reason for this is that the Liberal Democrats increased their support amongst BAME voters, from just over 6% in 2017 to 10% in 2019, and the Green party increased their support from less than half a percent to approximately 3%. This meant that BAME voters were less united around Labour than in either 2015 or 2017.

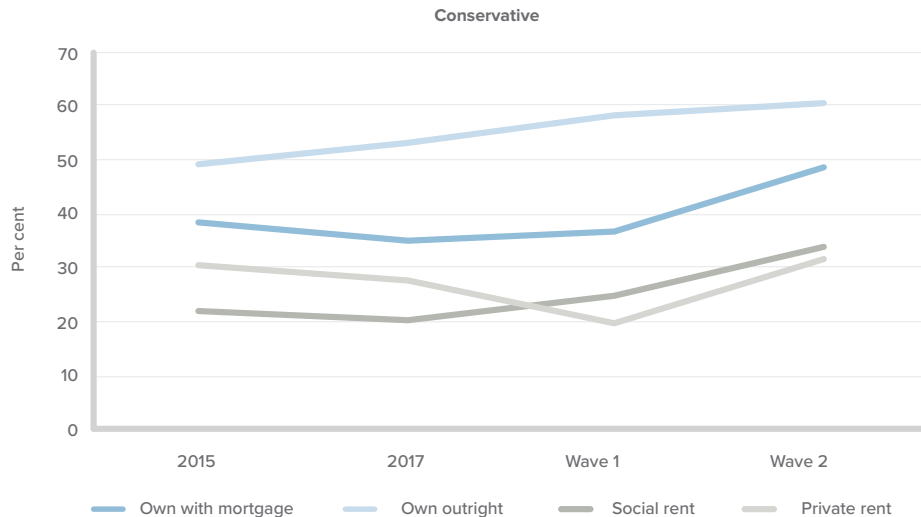
**Figure 25: Labour maintains a strong lead among BAME voters**



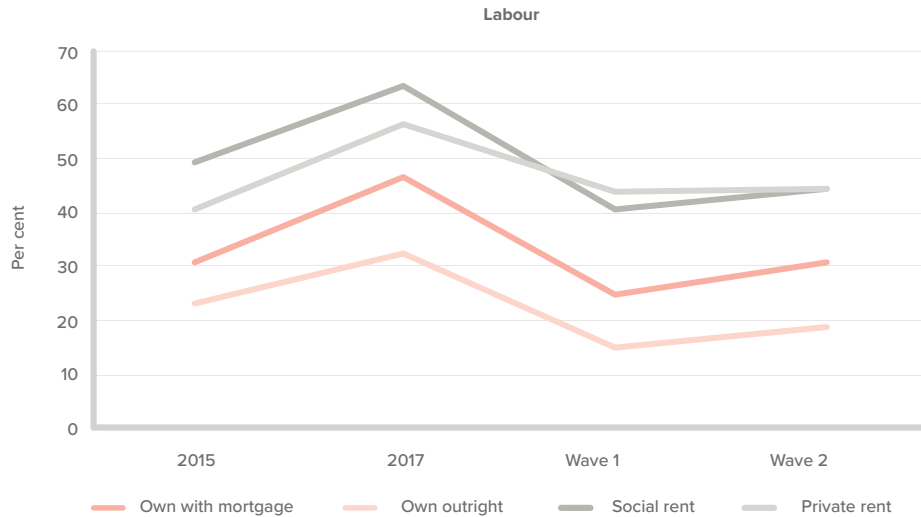
Source: Hanbury Strategy polling and British Election Study, Onward analysis, General Election Study 2015 and 2017.

- The Conservatives further cemented their position as the party of homeownership. They won 61% of those who owned their home outright, up from 56% in 2017 and 47% in 2015. This advantage was also evident, albeit to a lesser extent, amongst those who owned their house with a mortgage. The Conservatives won 44% of this group in 2019, up from 40% in 2017 and 37% in 2015.
- Labour lost ground amongst homeowners; reverting back to 20% of those who owned outright supporting them, down from 30% in 2017, and receiving support from 31% of those who owned with mortgages, down from 40% in 2017.
- Instead, a significant portion of their vote came from high levels of support amongst private renters, with 44% of this group supporting them, though this fell from 54% in 2017. The Labour party also maintained strong support amongst social renters, winning 44% of this group, though again this was a substantial decrease from the 64% that they won in 2017.
- More worryingly for the Conservatives, despite improvements compared to 2017, their lowest level of support within a tenure group was still private renters, who they won less than a third of (31%). This means that the Conservatives are now less popular amongst those who rent their home privately than those who rent live in social housing (34%).

**Figure 26: Levels of support for the Conservatives and Labour, by tenure type, 2015, 2017 and 2019 elections**



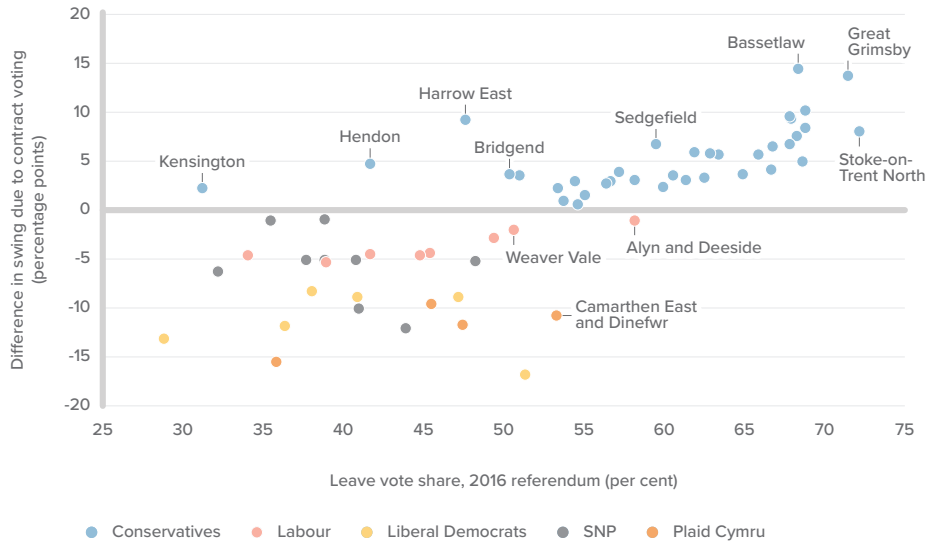
**Figure 27: Levels of support for the Conservatives and Labour, by tenure type, 2015, 2017 and 2019 elections**



### The role of contract voting

- Throughout the election campaign significant time and resources were spent discussing the impact of “tactical voting” – the idea that voters could tactically coordinate and switch votes to ensure the victory or defeat of a party in any given constituency. Remain United, People’s Vote and Best for Britain all attempted to persuade campaigners to align behind Remain parties.
- Evidence for the effectiveness of these campaigns is limited. In fact, we find evidence for an alternative form of non-ideal vote preference: “contract voting”. Instead of simply tactically voting to block another party, we asked voters which party they would *ideally* vote for if their local seat and candidates were disregarded and compared this to how they actually voted. This encompasses all possible reasons that this would be the case, rather than simply preventing an undesirable outcome.
- We found that 22% of votes were contract votes lent to a non-ideal party to deliver an outcome. Notably, contract voting appears to be concentrated in seats with a stronger level of support for Leave. In areas that voted strongly to Leave in 2016, contract voting boosted the swing by 10%, compared to 6% in areas that voted strongly to Remain. Contract voting was also strongest in some of the Conservatives’ most surprising seat gains.

**Figure 28: Relationship between contract voting and support for Remain/Leave, seats where contract voting made a difference to the result**



Source: Onward and Focaldata analysis, Hanbury Strategy polling data, wave 1 and wave 2.

- Contract voting was decisive enough to alter the result in 63 constituencies. The Conservatives were the net beneficiaries, winning net +19 seats as a consequence, mainly in the North and Midlands. The Conservatives’ Parliamentary majority rose from 42 to 80 because, as the Prime Minister puts it, people lent the Conservatives their votes.
- Labour lost 35 seats due to contract voting, suggesting that attempts to attract tactical votes backfired spectacularly. Whilst they gained 8 seats due to contract voting, this was easily offset by losses elsewhere. The Liberal Democrats, the SNP and Plaid Cymru were all beneficiaries of contract voting, netting increases of five, seven, and four seats for each party respectively. This likely indicates the coalescence of voters around a proven “challenger” party on the centre-left, as predicted vote shares for those parties were significantly lower using voters’ ideal affiliations.
- In total, the effect of contract voting was to boost the Conservatives and third parties at the expense of Labour. In these circumstances Labour faced a battle on two fronts; losing its heartlands as a consequence of contract voting to deliver Brexit, and losing ground to third parties who saw their vote share rise due to being the perceived choice for Remain voters. A full list of the constituencies where contract voting made a difference is displayed below:

**Table 6: Table of seats that changed hands as a consequence of contract voting**

Constituency	No contract voting (estimated results)							Contract voting (actual results)								
	Con	Lab	LD	BXP	SNP	Grn	PC	Result	Con	Lab	LD	BXP	SNP	Grn	PC	Result
Bassetlaw	35%	37%	9%	14%		5%		Lab	55%	28%	7%	11%		0%		Con
Birmingham Northfield	31%	39%	14%	12%		5%		Lab	46%	43%	5%	4%		2%		Con
Blackpool South	30%	38%	11%	16%		6%		Lab	50%	38%	3%	6%		2%		Con
Blyth Valley	33%	39%	10%	10%		7%		Lab	43%	41%	5%	8%		3%		Con
Bolton North East	33%	39%	11%	11%		6%		Lab	45%	45%	4%	4%		2%		Con
Bristol North West	33%	33%	18%	7%		10%		Con	39%	49%	9%	0%		4%		Lab
Burnley	31%	36%	13%	12%		7%		Lab	40%	37%	9%	9%		2%		Con
Bury North	36%	38%	11%	9%		6%		Lab	46%	46%	3%	3%		2%		Con
Bury South	36%	37%	11%	10%		6%		Lab	44%	43%	5%	3%		2%		Con
Canterbury	35%	29%	17%	9%		10%		Con	45%	48%	6%	0%		0%		Lab
Dewsbury	34%	39%	10%	11%		6%		Lab	46%	44%	4%	3%		2%		Con
Don Valley	35%	37%	9%	15%		5%		Lab	43%	35%	4%	14%		2%		Con
Gedling	33%	37%	11%	13%		6%		Lab	46%	44%	5%	4%		2%		Con
Great Grimsby	30%	36%	14%	16%		3%		Lab	55%	33%	3%	7%		2%		Con
Harrow East	34%	36%	15%	9%		6%		Lab	54%	38%	8%	0%		0%		Con
Hendon	33%	35%	18%	8%		6%		Lab	49%	41%	8%	0%		2%		Con
Heywood and Middleton	33%	38%	11%	13%		5%		Lab	43%	42%	4%	8%		3%		Con
Hyndburn	36%	40%	9%	10%		6%		Lab	49%	42%	3%	5%		2%		Con
Keighley	33%	33%	14%	13%		6%		Lab	48%	44%	5%	2%		0%		Con
Kensington	27%	31%	26%	7%		8%		Lab	38%	38%	21%	1%		1%		Con
Kingston and Surbiton	34%	21%	34%	7%		5%		Con	34%	11%	51%	1%		2%		LibDem
Leigh	32%	40%	10%	13%		5%		Lab	45%	41%	5%	7%		0%		Con
North West Durham	35%	36%	12%	10%		7%		Lab	42%	40%	6%	7%		3%		Con
Oxford West and Abingdon	36%	17%	34%	7%		6%		Con	38%	7%	53%	1%		0%		LibDem
Peterborough	36%	37%	11%	11%		6%		Lab	47%	41%	5%	4%		2%		Con
Redcar	32%	37%	12%	14%		5%		Lab	46%	37%	5%	7%		1%		Con

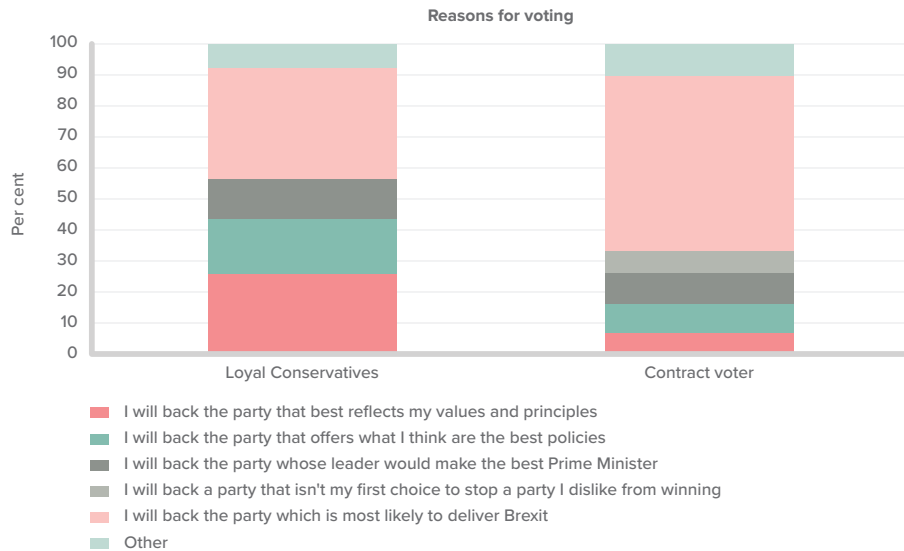
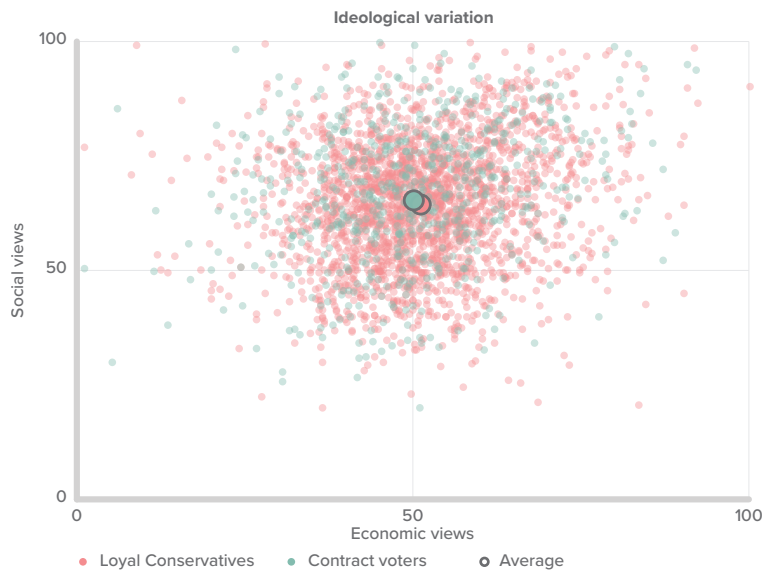
Constituency	No contract voting (estimated results)							Contract voting (actual results)								
	Con	Lab	LD	BXP	SNP	Grn	PC	Result	Con	Lab	LD	BXP	SNP	Grn	PC	Result
Rother Valley	35%	35%	9%	16%		6%		Lab	45%	32%	5%	13%		3%		Con
Scunthorpe	34%	38%	10%	13%		4%		Lab	54%	37%	2%	5%		2%		Con
Sedgefield	35%	38%	10%	11%		7%		Lab	47%	36%	5%	9%		2%		Con
Sheffield Hallam	26%	25%	30%	9%		10%		LibDem	26%	35%	33%	3%		3%		Lab
Stoke-on-Trent Central	33%	38%	9%	13%		6%		Lab	45%	43%	4%	5%		3%		Con
Stoke-on-Trent North	38%	38%	8%	11%		6%		Lab	52%	37%	3%	6%		1%		Con
Wakefield	32%	37%	11%	15%		5%		Lab	47%	40%	4%	6%		0%		Con
Warwick and Leamington	38%	30%	15%	7%		9%		Con	42%	44%	9%	2%		3%		Lab
Weaver Valley	38%	35%	13%	8%		6%		Con	44%	45%	7%	3%		2%		Lab
West Bromwich East	33%	44%	9%	10%		4%		Lab	47%	42%	4%	4%		2%		Con
West Bromwich West	34%	40%	10%	12%		4%		Lab	51%	40%	3%	5%		2%		Con
Westmorland and Lonsdale	42%	18%	28%	8%		5%		Con	45%	4%	49%	1%		0%		LibDem
Wirral West	36%	34%	15%	8%		7%		Con	41%	48%	6%	2%		2%		Lab
Wolverhampton North East	32%	40%	11%	13%		4%		Lab	52%	40%	3%	4%		2%		Con
Wolverhampton South West	34%	36%	14%	11%		5%		Lab	48%	44%	5%	3%		0%		Con
Aberdeen South	30%	18%	15%	5%	27%	5%		Con	36%	8%	11%	0%	45%	0%		SNP
Angus	34%	16%	12%	5%	32%	2%		Con	40%	5%	6%	0%	49%	0%		SNP
Caithness Sutherland and Easter Ross	27%	18%	15%	8%	27%	6%		Con	17%	6%	37%	4%	37%	0%		LibDem
Coatbridge, Chryston and Bellshill	18%	31%	10%	6%	29%	5%		Lab	13%	35%	3%	0%	47%	2%		SNP
East Lothian	24%	26%	12%	7%	23%	7%		Lab	27%	30%	7%	0%	36%	0%		SNP
Edinburgh West	25%	16%	22%	3%	29%	4%		SNP	17%	8%	40%	0%	33%	2%		LibDem
Glasgow East	18%	30%	8%	9%	27%	8%		Lab	15%	33%	4%	0%	48%	0%		SNP
Glasgow North East	13%	32%	11%	10%	23%	9%		Lab	11%	39%	3%	0%	47%	0%		SNP

Constituency	No contract voting (estimated results)							Contract voting (actual results)								
	Con	Lab	LD	BXP	SNP	Grn	PC	Result	Con	Lab	LD	BXP	SNP	Grn	PC	Result
Glasgow South West	16%	32%	8%	6%	32%	5%		Lab	12%	35%	4%	2%	48%	0%		SNP
Gordon	32%	16%	12%	5%	32%	4%		Con	41%	6%	11%	0%	43%	0%		SNP
North East Fife	26%	16%	18%	6%	29%	6%		SNP	13%	4%	43%	0%	40%	0%		LibDem
Rutherglen and Hamilton West	20%	28%	12%	6%	28%	6%		Lab	15%	35%	5%	0%	44%	0%		SNP
Ynys Môn	29%	31%	12%	11%		3%	15%	Lab	36%	30%	0%	6%		0%	29%	Con
Alyn and Deeside	37%	35%	11%	7%		5%	5%	Con	42%	43%	6%	6%		0%	3%	Lab
Gower	35%	34%	11%	8%		3%	8%	Con	41%	45%	5%	3%		0%	5%	Lab
Arfon	21%	32%	10%	7%		10%	20%	Lab	15%	36%	0%	4%		0%	45%	PC
Vale of Clwyd	34%	35%	10%	9%		2%	10%	Lab	46%	42%	4%	4%		0%	4%	Con
Dwyfor Meirionnydd	30%	25%	8%	10%		4%	23%	Con	32%	13%	0%	6%		0%	48%	PC
Clwyd South	34%	36%	11%	8%		6%	6%	Lab	45%	41%	4%	4%		0%	6%	Con
Ceredigion	26%	25%	15%	9%		1%	23%	Con	22%	16%	17%	5%		2%	38%	PC
Carmarthen East and Dinefwr	30%	28%	8%	11%		9%	13%	Con	35%	21%	0%	6%		0%	39%	PC
Bridgend	31%	36%	12%	9%		9%	3%	Lab	43%	40%	6%	4%		2%	5%	Con

Source: Onward and Focaldata analysis, Hanbury Strategy polling data, wave 1 and wave 2.

- One plausible rationale for this is that those who contract voted for the Conservatives did so without having to significantly compromise their values. Looking at a comparison of social and economic views, Contract Conservatives – those who voted for the party despite it not being their first choice – are extremely difficult to distinguish in terms of their economic and social views from other Conservative voters. They are slightly more ideologically diverse than authentically Conservative voters, but otherwise have a near identical average position.
- The difference between these voters instead appears to reflect the relative weight that they placed on delivering Brexit. Only 34% of loyal Conservatives said that they were voting to deliver Brexit, compared to 56% of those who were contract voting for the party. Contract Conservatives were also three times as likely to say that they were voting to stop a party they disliked from winning.
- In total, two-thirds of Contract Conservatives were voting for a tactical reason (“to deliver Brexit” or “to stop a party I dislike from winning”). Only a quarter (25%) were voting for a reason specific to the Conservative Party (that they offered the best policies, had the leader who would be the best Prime Minister, or that the party best reflected their values), compared to 57% of loyal Conservative voters.

**Figure 29 and 30: Differences and similarities between Contract Conservatives and Loyal Conservatives**

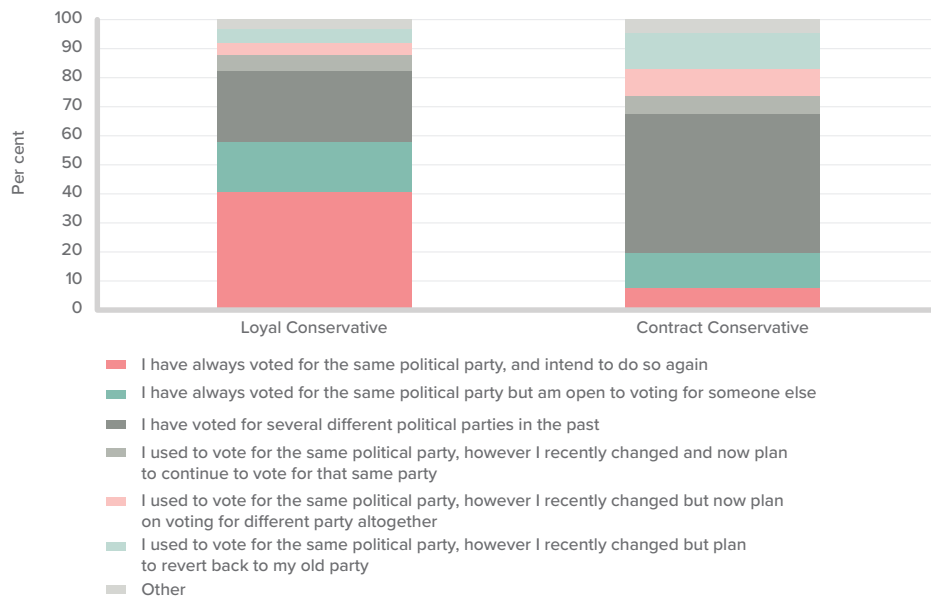


Source: Onward analysis, Hanbury Strategy polling data, wave 2.

- If these voters had not lent their votes to the Conservatives it is not clear that they would have instead supported Labour. In fact, our analysis suggests that the majority had already disengaged from their previous affiliations and saw their ideal party elsewhere. 64% of Contract Conservative voters saw their ideal party as the Brexit Party, compared to 13% with the Liberal Democrats and 11% with Labour.

- The previous affiliations of Contract Conservative voters are varied. Around one third (32%) voted Conservative, 14% had voted Labour and 15% had voted UKIP in both 2015 and 2017. 43% did not vote Conservative in either the 2015 or 2017 election, and 36% had voted UKIP in at least one of the two elections prior to 2019.
- They were also significantly less likely to be certain about their vote than authentic Conservatives. Only 66% of Contract Conservatives were sure that they would vote Conservative, compared to 82% of other Conservatives. 67% described themselves as likely to vote for the Brexit Party, double the number (34%) of authentic Conservatives. They were also twice as likely to say there was a chance of changing their vote at the least minute (32% compared to 17%).
- Looking at the self-described political affiliations of this group, it is not clear how sticky Contract Conservatives will be in the future; some 48% indicated that they had voted for other parties in the past, compared to only 24% of Loyal Conservatives.
- More worryingly for the party however is that 12% indicated that they had recently changed but they intended to revert back to their old party, and 10% indicated that while they had recently changed they now planned to vote for a different party altogether. In short, while Contract Conservatives backed the party in 2019, they can't necessarily be relied on to support the party in the next election.

**Figure 31: Respondents' views on their voting behaviour, Loyal Conservatives and Contract Conservative**



Source: Onward analysis, Hanbury Strategy polling data, wave 2.

# Temporary or permanent?

*What are the implications for the next parliament?*



At first glance it appears that the majority of 80 and the subsequent continued rise of the Conservatives in the polls heralds a new era of dominance. This chapter explores whether that is likely to be the case, and the landscape that the new Parliament will navigate over the forthcoming four years.

## Lent support, but mixed enthusiasm

- Despite delivering the third consecutive increase in Conservative vote share, voters were not necessarily optimistic about the outcome of a victory for the Conservatives. On polling day voters pessimistically expected their life to deteriorate in key ways regardless of who won, although people were especially fearful of the economic and security impact of a Labour victory.
- On economic issues, 64% of those who provided a view believed that a Conservative victory would mean taxes rising for them and their family, compared to 72% if Labour won. 48% thought the economy would go into recession if the Conservatives won, versus 71% for Labour. 65% of people felt that it would become harder for people like them to get by under the Conservatives, compared to 57% for Labour.
- On social issues, the Labour Party was generally seen to be more positive. Under a Conservative Government, 64% said schools would struggle to make ends meet, 68% believed more people would become homeless on Britain's streets, and 72% thought society would become more unequal. This compares to 44%, 40% and 42% respectively under a Labour future.
- The Conservatives effectively neutralised their most salient vulnerabilities. The share of voters believing that a Conservative government would result in the privatisation of the NHS fell from 52% to 49%, despite sustained campaigning from Labour during the campaign. 63% believed Conservative victory would result in an increase in the minimum wage.
- Labour left their vulnerabilities unattended. While 81% of people thought a Conservative victory would mean fewer migrants, a similar proportion believed Labour would see immigration rise. 60% of voters thought Britain's allies would no longer share intelligence if Jeremy Corbyn became Prime Minister, while 59% of people thought Britain's intelligence relationships would deepen under a Conservative government.
- As the salience of Brexit is increasingly dwarfed by Covid-19, the Conservatives' historic weakness on health and the NHS could prove their undoing. Public perception of the Government's handling of the coronavirus outbreak – positive or negative – will likely become a defining feature of the Conservative Party.

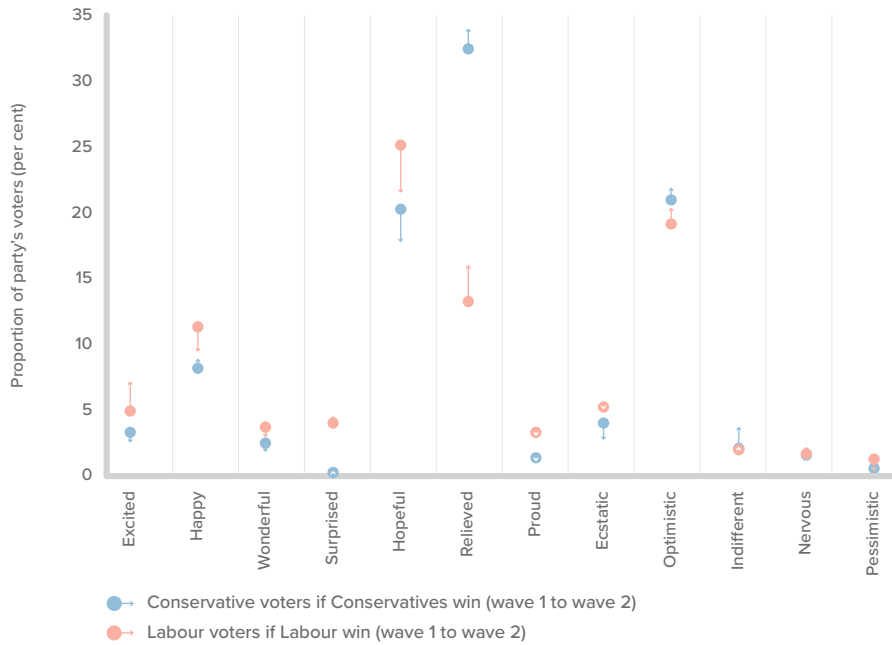
**Figure 32: Net expectations for consequences of victory, Labour and Conservatives**



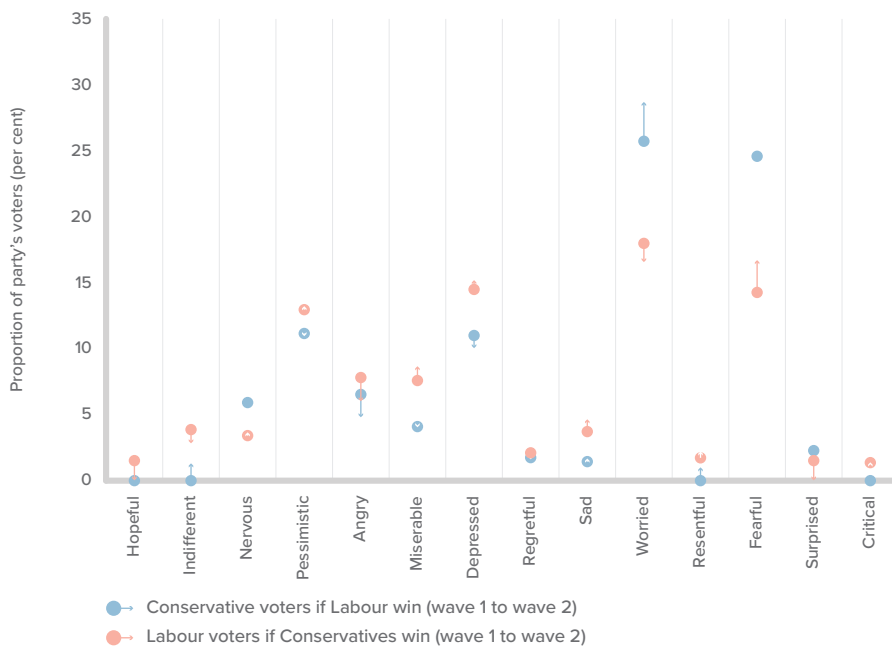
Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

- These expectations in turn translated to very different feelings about potential results of the election. As the campaign progressed, Conservatives became more likely to say that a victory would leave them feeling relieved (34%) than Labour voters (16%). However, Labour voters were slightly more likely to be hopeful (21%) than Conservatives (20%) about the prospect of victory.
- This reflected a deeper set of concerns. Conservative voters were much more likely to be worried about a Labour victory (29%) or fearful of it (25%), than Labour voters were about a Conservative victory (17% for both). Labour voters, perhaps reflecting the emotional engagement with the campaign, were more likely to say they would be depressed (15%) than Conservatives (10%) if the opposing party won.
- In short, a large amount of the sentiment and expectations that surrounded Conservative support appeared to be driven by a deep-seated fear of a Labour victory, rather than necessarily being indicative of sweeping and permanent increase in optimism about the Conservative party.

**Figure 33: Positive emotions each party's supporters expected to feel if their party won the election**



**Figure 34: Negative emotions each party's supporters expected to feel if the other party won the election**



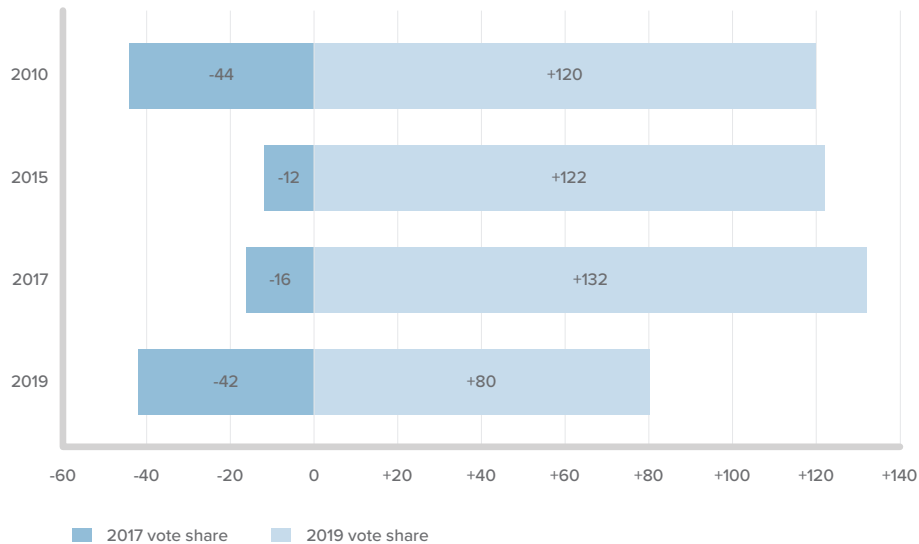
## Volatility and churn will continue to define our politics

The two general elections since the EU Referendum in 2016 were the two most volatile elections since records began. Despite the result of the 2019 election, our polling suggests that this is likely to be a feature of future general elections. Party allegiances are not settled.

- In 2019, 37% of people switched their vote to support a different party to 2017.<sup>20</sup> This is high but not unprecedented: in 2017, 33% of voters switched loyalties. Nonetheless, this is three times higher than in the 1960s, when individual-level volatility was just 13%.<sup>21</sup>
- The Prime Minister appears to understand how unpredictable the new electorate may prove, suggesting that votes were “lent” to him in December. But this unpredictability is more pronounced for Labour, whose reliance on younger and highly educated voters in metropolitan areas makes its vote increasingly “inefficient” – i.e. higher levels of support at the ballot box is yielding ever lower returns in terms of seats.
- The average number of votes the Labour Party needed to gain a seat rose from 33,400 to 40,300 between the 2010 and 2015 elections. By 2017, Labour’s votes-to-seat ratio had risen to 49,150 and, in 2019, it rose again to 50,800. This means Labour need to convince over 17,000 more voters per seat they gain than a decade ago. In practice, this inefficiency implies that a parliamentary majority may be out of reach unless there is a change in strategy.
- The trends in the Conservative vote are more complex. In 2010, the party narrowly missed out on a majority, recording 35,000 votes per seat but falling short in a number of places. An extremely efficient campaign in 2015 delivered a majority with a 0.8% vote increase. The 2017 coalition was considerably less efficient, growing the Conservative vote in places where the party had historically failed to win but losing the 13 seats overall. Over 43,000 votes were needed for each Conservative seat in 2017.
- In 2019, by contrast, the Conservative campaign converted a 1.2% rise in vote share into a 48 seat gain. This was achieved by increasing the efficiency of each vote, requiring only 38,250 votes being won for each seat – 4,750 fewer than in 2017. An effective campaign turned a number of previously safe Labour seats into marginals, which were then won on polling day. The flipside of this is that some long-held Conservative seats which have rarely been won by Labour, such as Guilford, Watford, or Esher & Walton, swung drastically away from the Conservatives. They are now marginals in their own right.
- This yields a volatile landscape for the next election. There are significant numbers of seats available to the Conservatives to consolidate their majority, with around 60 more Labour-held seats potentially in play. However, the Conservatives also hold a greater proportion of seats that might be vulnerable; around 75 Conservative-held seats are at risk of either being lost for the first time in several election cycles, or regained by opposition parties. The Conservative vote is effectively more thinly spread than previously, leaving both the potential to win an even bigger majority, but also a severe risk of losing a majority from a relatively small fall in popularity.

- To demonstrate just how volatile British politics has become, we analysed a series of alternative electoral scenarios. If the Conservatives had replicated their 2019 vote share against a 2010 vote distribution, the party would have won 120 seats rather than 80. Alternatively, if the Conservatives had fought a Labour Party as popular as in 2017, the Conservatives would have been 21 seats short of a majority.

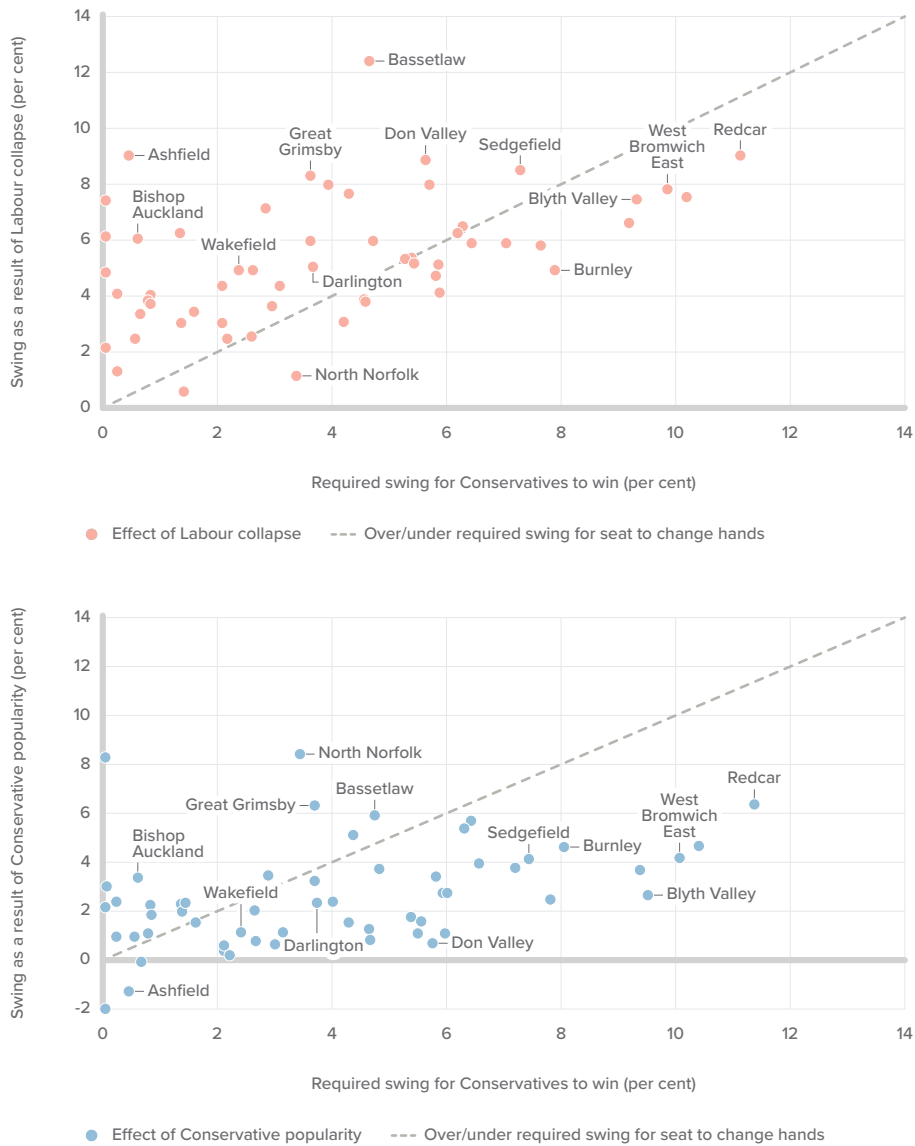
**Figure 35: Estimated majority sizes using 2017 and 2019 vote shares on vote distributions from 2010–2019**



Source: *Onward analysis, House of Commons Library data.*

- The line between a huge majority and a hung Parliament has narrowed significantly. Even a loss of around 4.3% from the Conservatives to Labour nationwide would be enough to shift the result back to a hung Parliament.
- In reality, this could be achieved with a smaller but more concentrated swing in key areas. The Conservatives only need to trade 1,850 votes with Labour in each of the most marginal seats in order to reduce their number of MPs from 365 to 320. In total, this represents a 0.6% decrease in their national vote share.
- A comparison of Conservative 2019 vote share and Labour 2017 vote share reveals that 19 of the Conservative gains would have been won on the basis of the increase in the Conservative vote share alone, even if Labour hadn't collapsed. These included Bishop Auckland, North Norfolk, Great Grimsby, Bassetlaw, and Newcastle-under-Lyme.
- Had the Conservatives simply maintained their vote share at 2017 levels and relied entirely on Labour's decline, the Conservatives would have gained 40 additional seats, including Wakefield, Ashfield, Workington, Don Valley, Sedgfield, and Bishop Auckland.

**Figure 36: The impacts of Conservative popularity and Labour collapse compared to required Conservative swing, 2019 Conservative gains**

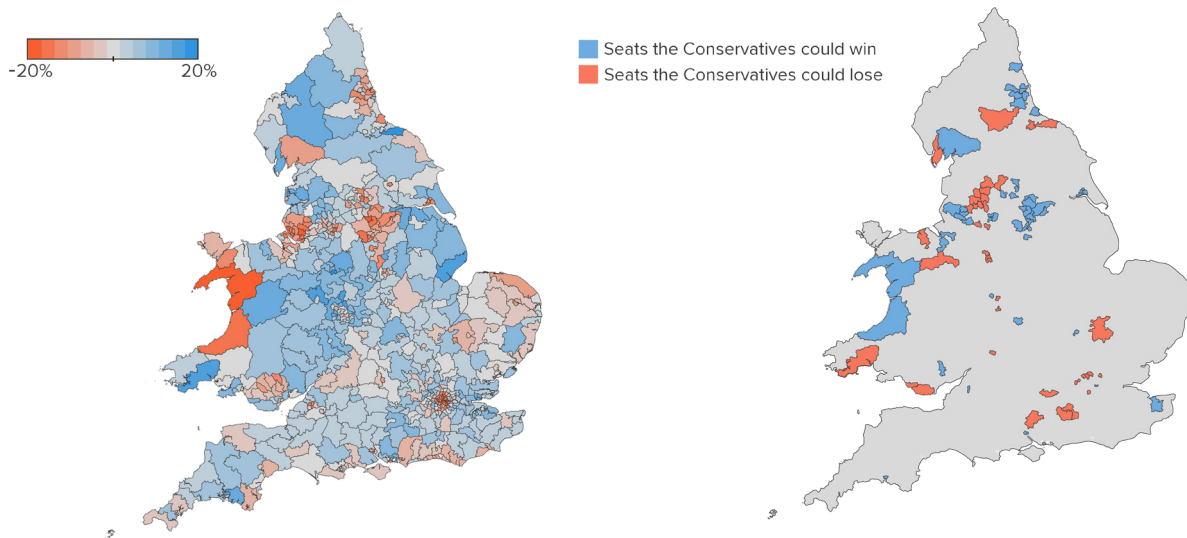


Source: Onward analysis, House of Commons Library data.

- The rise in Conservative vote share obviously cannot be viewed in isolation from the decline in Labour vote share. The central point is however that Labour’s vote share collapse was central to the Conservatives seat gains, and if Labour’s vote share starts to increase it may have outsized consequences on the Conservatives’ seats.

- Another way of looking at this is considering party over-performance and under-performance. Demographic information such as age, gender, and education correlates strongly with voting behaviour, which can be used to predict a party’s level of support. The gap between estimates (the “residual”) and reality can be used as a proxy for over- or under-performance in that seat, and therefore to signal latent potential for each party to gain support.
- Whilst the residual can explain a variety of unobservable factors (for example cultural reasons for not supporting a party, as in Liverpool with Conservatives) it can also highlight areas where support may be under- or over-valued. This was the approach used to identify the “Red Wall” of seats in the North and Midlands ahead of the 2019 election.
- When considering the 2019 election results, we find that the Conservatives over-performed in many historically Labour strongholds, reversing the pattern of under-performance from previous years. There is a strong correlation between this over-performance and Leave-voting and “contract voting”. This over-performance suggests that the Conservative coalition may not be as firm in future election cycles.
- To illustrate this with an example, the Conservatives won 52% of the vote in Barrow & Furness, with a majority of 12.6%. Our demographic model predicts a 41% vote share. If there is a reversion towards the predicted level of Conservative support, then Barrow is a potential loss at the next election.<sup>22</sup> Conversely, in Halifax the Conservatives under-performed by 8%, but a 3% swing would take the seat from Labour.

**Figure 37: Over and underperformance in UK constituencies, and seats that the Conservatives would be expected to win or lose under these projections**



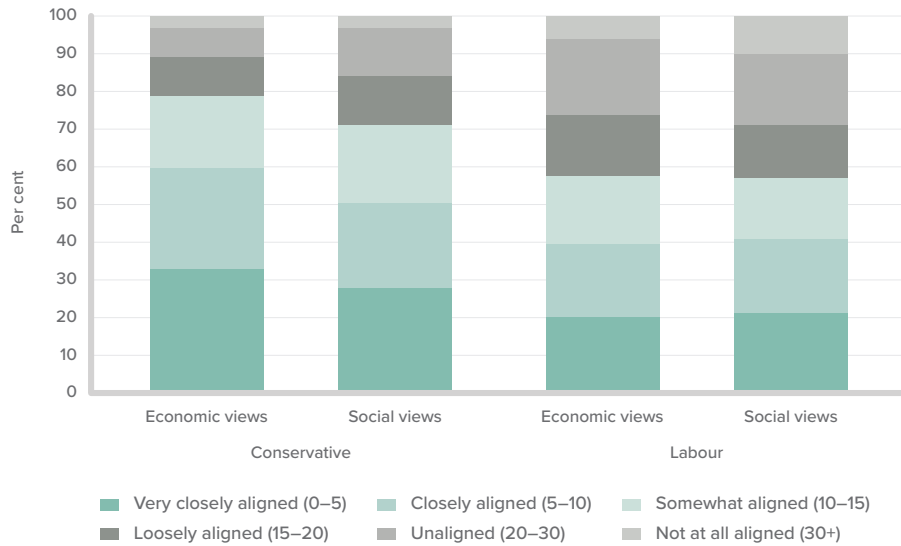
Source: Onward analysis, House of Commons Library data.

- The results are mixed. On the one hand, seats such as Doncaster North, Doncaster Central, and Hartlepool are all areas where the Conservatives came close in 2019 and statistically under-performed. This analysis suggests further bricks in the Red Wall could fall in the election cycle, and that seats such as Blyth Valley, Redcar and North West Durham may become more securely Conservative over time.
- On the other-hand, the results also suggest that some new Conservative seats may be at risk. Iconic 2019 wins such as Bishop Auckland, Stockton South, Keighley and Middlesbrough South all included over-performance and may not be as secure as their new MPs would like. These seats could be the new marginals that form the backdrop to future elections.
- Analysis of Conservative over-performance suggests the party may lose ground in metropolitan and pro-remain seats which were considered vulnerable in 2019, but which they managed to hold. Seats such as Cheadle, Cheltenham, Guildford, South Cambridgeshire, Wokingham, Winchester and Hendon are all vulnerable to being lost in future.
- Overall, the picture suggests that future elections will be fought in marginal seats of the North and Midlands, which had previously been solidly Labour, whilst the Conservatives may lose ground in some of their Southern heartlands.
- The Conservatives would be predicted by this model to take approximately 50 more seats in the future, stretching the majority to historically huge proportions. However, they would also be predicted to lose 37 seats which, in isolation would almost wipe out the majority. At the next election they could emerge strengthened, but a hung Parliament remains a possibility if their lead is not sustained.

### How well placed are parties to adapt to this new reality?

- There is significant variation in the ideological consistency of each party's current coalitions, suggesting that the realignment witnessed to date may continue.
- 62% of Conservative voters are very closely or closely aligned with average Conservative values on economic issues. 51% are very closely or closely aligned on social issues. Labour voters are less homogenous. Only around 40% are similarly aligned on either economic or social views.
- Additionally, a quarter (26%) of Labour voters appear to have completely different values to the average on social issues. This compares to 16% of Conservative voters who are similarly estranged. On the economic axis, 23% of Labour voters are not at all aligned with the values of the average Labour supporter, compared to 10% for Conservative voters.
- These differences can be seen in Figure 38 below. Labour's coalition is more evenly spread, indicating greater distances from the average of their fellow supporters. Comparatively, Conservative voters are more closely clustered, suggesting they have more in common with each other despite a diverse geographic spread.

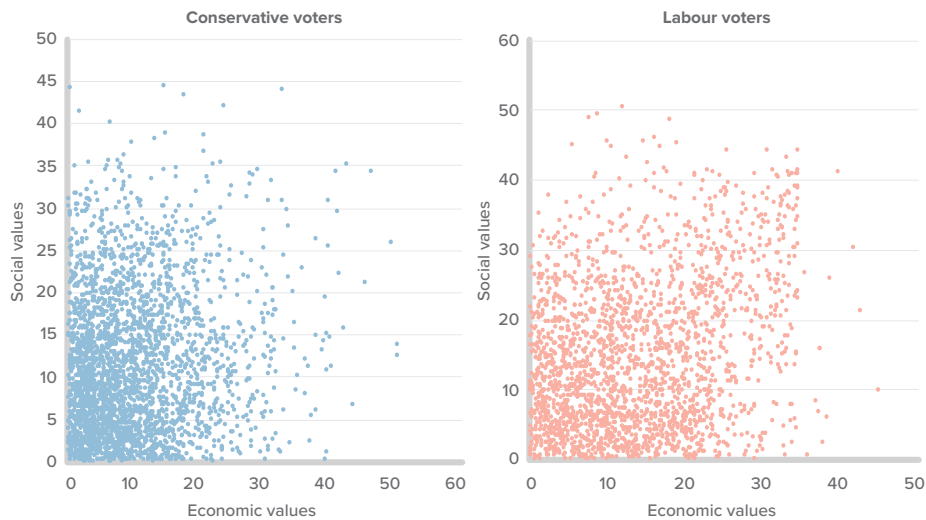
**Figure 38: Ideological homogeneity of Conservative and Labour coalitions**



Source: Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.

Notes: This graph takes the mean score on the economic and social axes for Labour and Conservative voters, and then measures how far each individual voter deviates from that mean value.

**Figure 39: Ideological similarity of Conservative and Labour voters**



Source: Onward analysis, Hanbury Strategy polling data, wave 2.

- We can also delve deeper into the nature of the different “wings” of each party. For the Labour coalition, the conservative-right and liberal-left wings each account for a third of the Party but are very differently distributed. 35% of Labour voters are marginally more conservative and right-leaning than the average (within 30 points of the mean). However, only 25% of Labour voters lean more towards the liberal-left than the Party average. There are roughly three times as many supporters on the liberal-left fringe (more than 30 points of the mean) than the conservative-right fringe.
- Acknowledging this uneven distribution will be crucial as the Party attempts to recover from its historic 2019 defeat. The large moderate centre-left cluster is potentially vulnerable to defecting to the Liberal Democrats (given their significant values overlap with Liberal Democrat voters). If Keir Starmer shifts his party to consolidate support among this group, there may be a risk of alienating the “long tail” of far-left supporters.

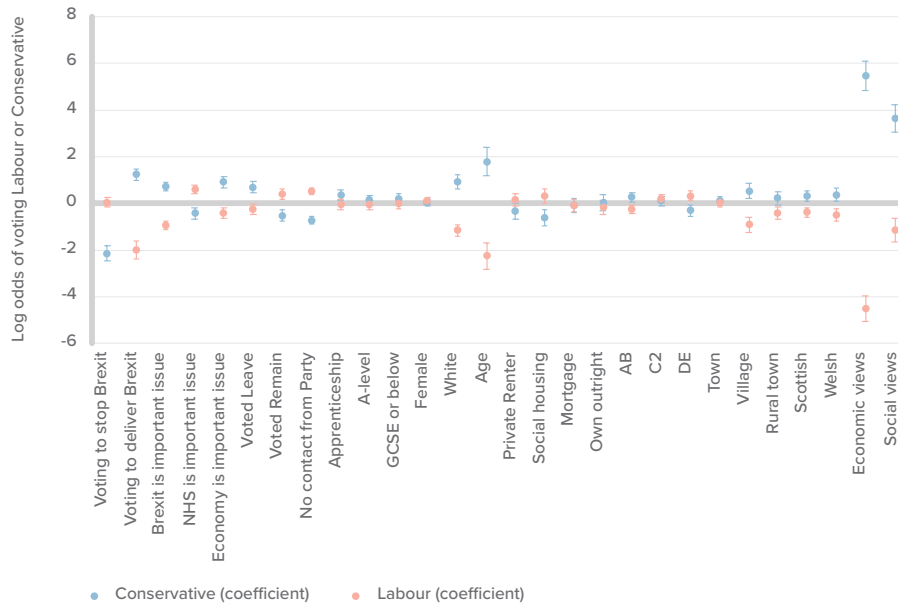
## What drove people’s votes?

The 2019 General Election appears to confirm that a number of trends that are set to define politics in the near term, in particular the dominance of Brexit as an identity issue and the generational age gap. However there are a host of other factors that influence vote intention. Applying a logistic regression to all the factors within our sample, we find that that:

- The single most important component for determining how likely an individual was to vote Conservative is their economic views. This is five times more predictive of Conservative voting patterns than whether or not they voted to Leave and more than twice as predictive as their age. This was followed by their social views, which is around four times more predictive than Leave-voting and twice as predictive as age.
- For Labour voters, the key factors are economic views and age. The effect of being economically left-wing is almost four times as strong as social liberalism. This is partly due to the wide variety of social views that coexist within a Labour coalition that includes older working class voters and younger metropolitan liberals. Alignment on economic views is much more important, in isolation, for voters to support the Labour Party than any position on Brexit.
- Many demographic factors have individually small effects which compound as they are added together. An individual who is older, voted Leave, is white and lives in a village is more likely to vote Conservative than Labour due to a combination of all of these factors. The impact of voting Leave or Remain is itself fairly small, but it correlates heavily with age, education, home ownership and other factors that cumulatively make a difference.
- This was primarily because there is a stronger relationship between social views and demographic variables. This meant that the correlation between socially liberal views and likelihood of voting for Labour or the Conservatives was primarily explained by these demographics, rather than the views themselves.

- To fully understand politics over the next Parliament, we must have a grasp on not just who each Party's supporters are, but the values that those people typically hold.

**Figure 40: The marginal impact of different characteristics on likelihood of voting Conservative and Labour**



Source: *Onward analysis, Hanbury Strategy polling data, wave 2.*

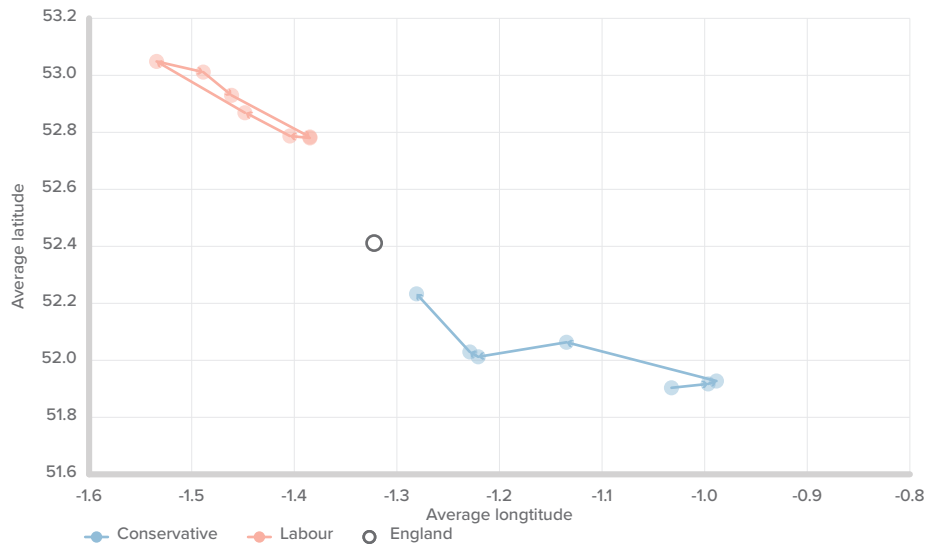
## The challenge for the Conservative Party

The Conservatives now need to fight on two fronts. First the Party needs to retain and build on the support it has won in the North and Midlands. But it also needs to urgently address a ticking time bomb of declining support among younger voters that is undermining its coalition over time.

- In 2019, the Conservatives won eight seats that had never before voted Conservative at a General Election: Ashfield, Bishop Auckland, Don Valley, Leigh, Newcastle-under-Lyme, Rother Valley, Workington and Wrexham. They also won a further 13 seats that had not elected a Conservative member of Parliament since the Second World War.
- This was both historic and predictable: it followed a shift that has been visible for some time. In 2015, Ed Balls was unseated in Morley & Outwood, an area that had (despite frequent boundary changes) seen continuous Labour control for the past 90 years. Two years later another four Labour strongholds fell to the Conservatives: Copeland, Mansfield, North East Derbyshire and Walsall North.

- The 2019 election built strong foundations for the party to prosper across the country. In 1997, the average latitude and longitude of all Conservative seats put the centre of the party in Buckingham. By 2019 it had continued its steady trend Northwards, with the centre of the Conservative Party now in Daventry in the Midlands. The centre of gravity for the 2019 intake of Conservative MPs is Sheffield.

**Figure 41: Centre of gravity for Conservative seats in England**

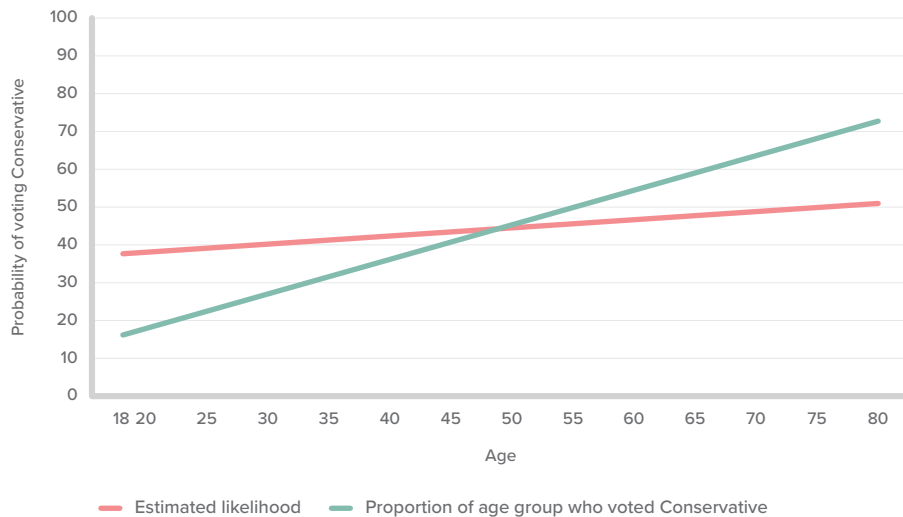


Source: Onward analysis, House of Commons Library data.

This regional success should not obscure a number of longer-term electoral challenges that the Conservatives face, driven by the Party's declining support among younger voters.

- In 2019, age was one of the defining factors influencing political behaviour. While the tipping point at which someone was more likely to vote Conservative than Labour fell (from 47 in 2017 to 43 in 2019), the age curve of voting behaviour steepened.
- Last year, Onward's research found that, controlling for demographic factors and estimation, young people are less Conservative than electoral data would predict they should be. This would suggest that as they age, younger generations will be less Conservative than their parents were at that age, meaning there is a cohort effect rather than a lifestyle effect.
- Conducting this analysis with data from our election panel, we find the presence of the same cohort effects during the 2019 general election. Older voters are much more likely to vote Conservative than our statistical model suggests they should be, and the opposite is true for younger voters, who are much less likely to vote Conservative than they should. The implication is that even with an aging population the potential size of the Conservative coalition will shrink over time.

**Figure 42: The Conservative age curve against predicted model based on education, social and economic views, ethnicity, tenure and other demographic variables**



Source: Onward analysis, Hanbury Strategy polling data, wave 2.

Notes: Demographic variables used include housing tenure, education, social grade, gender, and rurality, combined with economic and social views, and Brexit-related variables such as EU Referendum vote recall, whether Leaving the EU (or the NHS or the economy) is the most important issue facing the country, and whether an individual's motive for voting is to stop or deliver Brexit.

- Youth is correlated with a number of other factors, including private renting and ethnic minority background. Among BAME voters, the Conservative Party won 18% of the vote in 2019, down from 23% in 2015. In 2017, BAME voters accounted for 13% of the total voting population. This is set to increase, with a 2012 study by the University of Leeds finding that approximately 20% of the population will be BAME by 2051.<sup>23</sup>
- A similar pattern is visible among private renters. 31% of private renters supported the Conservatives in 2019, a similar proportion to the previous two elections but less than any other tenure grouping, including social renters. The Labour party continued to lead this group by 13 points. The proportion of voters in private rented accommodation has increased by 4 percentage points since 2010 and is expected to increase to 20% by 2040.<sup>24</sup>
- As table 7 demonstrates, these characteristics, along with higher education levels, socially liberal views, and urbanity, are much more prevalent amongst younger people than the rest of the population. Over one fifth of 25–34 year olds that five out of six of the listed criteria.

**Table 7: Prevalence of indicators which are negatively related to Conservative vote, by age group**

Prevalence of non-Conservative characteristics, by age group							
	18–24	25–34	35–44	45–54	55–64	65+	Average
Under 35	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	
Non-white	16.8%	18.1%	11.3%	7.4%	3.2%	1.5%	8.6%
Degree	47.5%	51.6%	41.4%	31.8%	27.1%	20.0%	31.5%
Urban	86.0%	88.3%	86.6%	82.7%	80.4%	75.8%	82.6%
Private renters	24.4%	29.8%	22.4%	15.0%	10.0%	6.1%	16.6%
Socially liberal	74.7%	64.9%	59.9%	44.5%	36.8%	27.5%	48.3%
Economically left wing	37.5%	38.3%	41.2%	38.4%	43.2%	38.1%	39.4%
Proportion of each age group with a given number of characteristics							
1	100.0%	100.0%	97.8%	95.6%	94.4%	90.9%	96.4%
2	98.7%	98.7%	80.2%	68.7%	64.0%	51.5%	76.9%
3	82.2%	84.1%	51.1%	37.8%	30.4%	20.3%	51.0%
4	52.8%	60.2%	25.9%	14.1%	10.8%	5.9%	28.3%
5	20.6%	32.4%	6.3%	3.1%	1.0%	0.3%	10.6%
6	4.3%	12.4%	0.8%	0.2%	0.1%	0.1%	3.0%
7	0.4%	1.3%	0.0%	0.0%	0.0%	0.0%	

Source: Onward analysis, Hanbury Strategy polling data, wave 2.

- The challenge for the Conservative party is therefore twofold; first it must consolidate and strengthen support in its newly won Northern and Midlands seats, seeking to turn them from marginals and first-time victories into Conservative strongholds. Second, it must address the longer-term existential challenge it faces with young voters, and especially with BAME voters and renters. Without doing so it faces the prospect of short-term victory but long-term decline.

## The challenge for the Labour Party

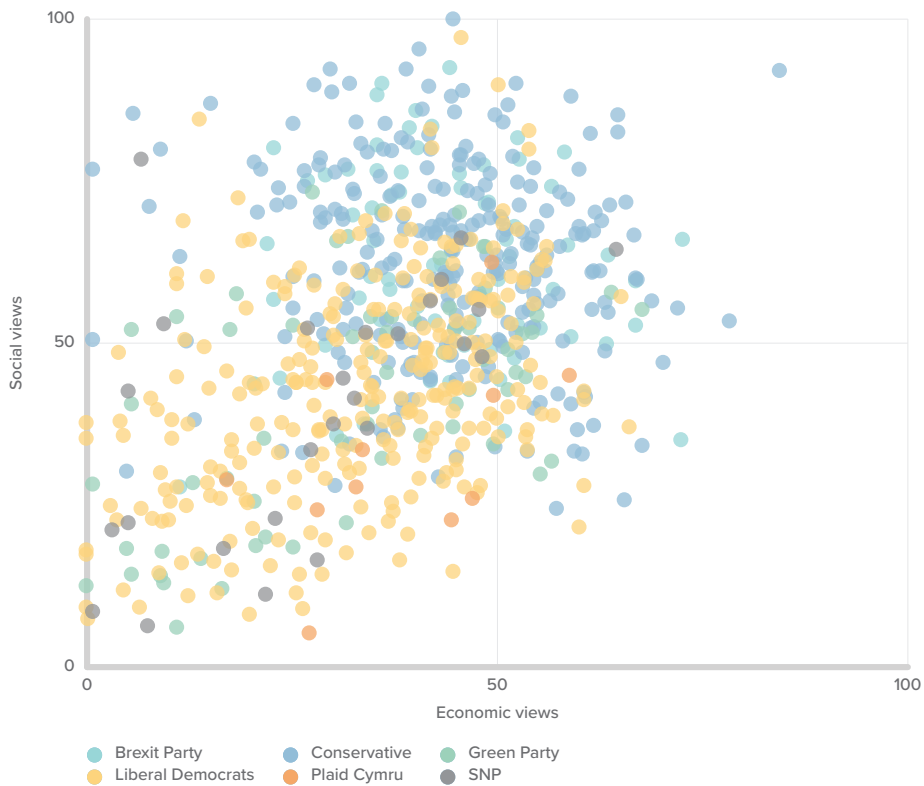
Labour is in the middle of a fierce debate about how to become electorally competitive again. In the wake of Keir Starmer’s selection as party leader, he faces a variety of strategic choices.

- The received wisdom is that Labour’s challenge in 2019 was internal division over Brexit. There is an element of truth to this. The destination parties of Labour’s lost voters was heavily correlated to voters’ leanings

in 2016: 67% of those who switched to the Conservatives were Leave supporters. 74% of those who switched to the SNP or Liberal Democrats voted Remain.

- However, Brexit was itself a reflection of wider social and economic views. Focusing on the referendum prevents a deeper debate about the values that sit behind it. Voters that defected to the Conservatives, for example, were significantly more culturally and socially Conservative and were extremely disapproving of Jeremy Corbyn: only 19% viewed the Labour leader positively.
- Conversely, voters who defected from Labour to the Liberal Democrats were on average more left-wing economically and more socially liberal. 45% viewed Corbyn positively. Only four in ten (41%) of these voters stated that they voted for their chosen party because it was more likely to stop Brexit or deliver a second referendum, suggesting other factors were more important.

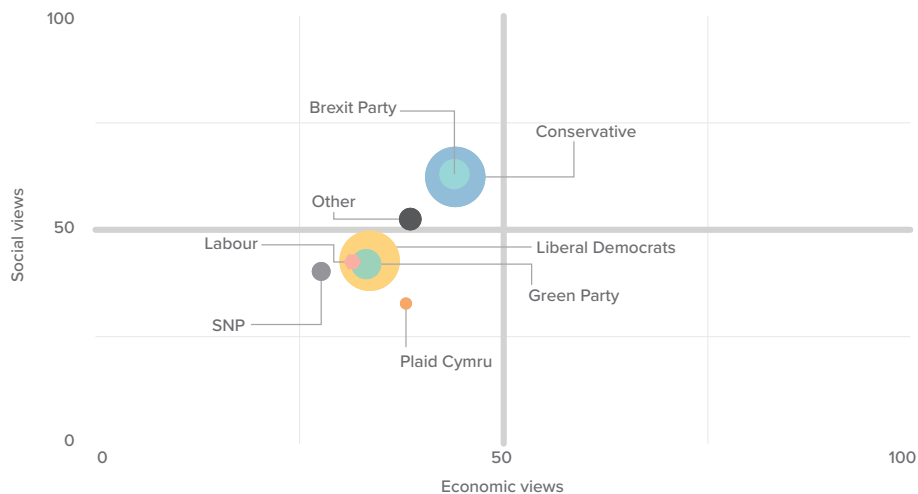
**Figure 43: Social and Economic positions of ex-Labour voters, by party they supported**



Source: Onward analysis, Hanbury Strategy polling data, wave 2.

- The strategic choice for Labour is whether to double down on one group of voter – the working class heartlands or its new metropolitan radical wing – or to try to simultaneously win back support from both. In making this choice, the size and ideological homogeneity of both groups are paramount considerations.
- Analysing the potential number of seats that Labour could win by unifying support amongst left-wing parties (assuming the Conservatives do not themselves collapse) suggests an upper ceiling of around 260 seats.<sup>25</sup> This is the total *maximum* number of seats available to a popular left-wing party in Britain today, based on existing patterns of support. This suggests that consolidating support amongst Liberal Democrat and Green defectors cannot be the solution without also either winning over new voters from the Conservatives, or winning back ex-Labour voters who have gone elsewhere.
- A similar problem exists if the party were to try to triangulate between both groups. To regain defectors from the Conservatives, Labour would require an emphasis on socio-cultural security, in the manner of New Labour. The opposite however is true for winning back Liberal Democrat or SNP defectors, who favour more socially liberal stances on crime and immigration.
- Looking at Figure 44 demonstrates this challenge, the position of the Labour Party's current supporters lends itself to selecting a path, which appeals primarily to voters who have defected to the Liberal Democrats. Winning back ex-Labour voters who have defected to the Conservatives or Brexit Party appears more challenging and will require compromising much more significantly on cultural values.

**Figure 44: Social and economic positioning of ex-Labour voters, and party that they supported in the 2019 election**



Source: Onward analysis, Hanbury Strategy polling data, wave 2.

- This speaks to the comparative demographic and geographic diversity of the Labour coalition. While the Conservative coalition is generally older, white and with similar educational backgrounds, Labour's vote is split between its newer cohort of younger, ethnically diverse and highly educated voters, typically located in metropolitan centres, and its older, white, less educated, working class base, often in towns or rural areas.
- This leads to a much higher divergence of opinions and values that may not be possible to reconcile. In the 2020s, Keir Starmer may have a strategic choice to make for which there is no visible Third Way.

# The future

*Understanding the new electorate*



This chapter seeks to identify the tribes that underpin the new electorate and explore what they mean for Labour and the Conservatives. To do this, we apply Latent Class Analysis to our dataset to identify groups holding similar characteristics or values. We are able to categorise the British electorate into eight key groups.

- **Industrial working class (14% of the population):** Underrepresented in London and overrepresented in the North West, the Industrial Working Class are much more likely to be DE workers (31%) than the national average (22%). This group is also disproportionately likely to work in manufacturing, construction, and transport and storage.

They voted 2:1 for Brexit (48% Leave, 24% Remain), but had high levels of apathy, with 20% saying they did not vote and a further 7% not being registered to do so. At the election they marginally supported the Conservatives (26%) over Labour (23%), but again showed a high level of disengagement; 19% opted not to vote, and 16% said they did not know who they would support. This means that, of those who did vote in the General Election, 40% backed the Conservatives and 35% backed Labour.

Their values are in line with the population average – slightly to the left on economic issues and to the right on social issues.

- **Provincial middle class (18% of the population):** This group is much older than average; with 55% of members being aged over 55, and less than one fifth (14%) being under 35. They are also much less concentrated in London than many other groups and much more likely to own their own homes and live without children. 38% own outright and 28% own with a mortgage, and 68% have no children at home. They are slightly more likely to work in lower middle and skilled occupations: 31% C1 and 23% C2 workers.

Politically, this group heavily supported the Conservatives in 2019, with 52% voting for the party, and Labour only retaining 12% amongst the group. They heavily supported Leave in the referendum by 53% to 33%. They had relatively low levels of not voting (11%) and only 3% were not registered to do so.

Economically, they sit with the rest of the country on the centre-left. However, they are more socially conservative than the average person. 88% of this group are in the left-conservative quadrant.

- **Persuadable centrists (7% of the population):** Nearly a quarter (24%) of this group are aged 35–44 and their distribution across the country mirrors the general population. They are gender balanced; 49% women and 51% men. Little distinguishes them in terms of class, but one third (34%) own their house with a mortgage – higher than any other group. Partly due to the age composition, Persuadable Centrists are disproportionately likely to be couples with children (40% live with dependent children compared to 33% nationwide).

In 2016, this group slightly favoured Remain – they split 41% for Remain compared to 36% for Leave, though 22% either did not or could not vote. At the election they split evenly between the Conservatives (28%) and Labour (28%). A high proportion either did not vote (15%) or did not know who they intended to vote for (14%).

This is a group that is persuadable, but currently unaligned. In terms of their values they overlap significantly with the population average although are slightly more likely to be in the upper-left quadrant of our social and economic axis (i.e. economically interventionist and socially authoritarian).

- **Metropolitan Liberals (6% of the population):** As the name would suggest metropolitan liberals are over indexed in urban areas (21% live in London alone) and more likely to be in professional or managerial classes. 30% are AB and a further 30% are C1 workers. They are much more likely to live in the private-rented sector than other groups (23% do so) or to live rent free with family (12%), and only 49% are homeowners – ten points below the average. Nearly a quarter of this group (24%) are aged between 35 and 44, and much lower proportions of the group are at the extremes of the age distribution.

This group strongly supported Remain over Leave in the referendum, by a nearly 2:1 margin (43% to 22%). In 2019, they were significantly more likely to support Labour (44%) than the Conservatives (16%). Comparatively, their support for the Liberal Democrats was fairly limited: only 7%.

This relative preference suggests a set of values based around social liberalism. They are eight percentage points less likely to be conservative than the population average. However, there is a slight libertarian streak among Metropolitan Liberals; they are almost twice as likely as the rest of the country to be simultaneously economically and socially liberal.

- **New Radicals (11% of the population):** Newly emboldened and distinct, the New Radicals are significantly younger than average; nearly a fifth (18%) are aged 18–24, a further fifth are aged 25–34, and nearly a quarter (24%) were aged 35–44. Over half (54%) have a degree, and 38% are in the AB social grade.

This group formed a significant part of Labour's 2019 core vote. 60% voted Labour and they are more likely to vote for the Green Party (5%) than the Conservative Party (4%). They also had a relatively high level of support for the Liberal Democrats, with 14% of this group supporting them. Brexit is likely to be a motivating factor here. Only 7% supported Leave compared to 74% who supported Remain.

The New Radicals have an extremely distinct set of values motivating their politics. 91% are in the bottom-left quadrant (compared to a population average of 29%) indicating that they are economically interventionist and socially liberal; even within this quadrant, they cluster towards the extreme ends of both scales.

- **Cultural conservatives (8% of the population):** Cultural Conservatives are significantly older than other groups, two thirds of Cultural Conservatives are aged 55 or over (22% aged 55–64 and 44% aged over 65). They are much less concentrated in London, and have the highest concentration in the South East. Nearly half (46%) own their homes outright, and this group has a larger proportion of men (53%) compared to women (47%).

Cultural conservatives supported Brexit more strongly than any other group. 72% of the group elected to Leave the EU and only 16% supported Remain. They were also more politically active: only 10% did not vote and only 2% were not registered. At the General Election they supported the Conservatives more strongly than any other group: 65% voted for the Conservatives, and were more likely to not vote at all (11%) than to vote for Labour (7%).

As the name might suggest, their political behaviour is driven by a distinct set of values. The inverse of New Radicals, 99% of this group are socially conservative. They vary considerably on economic issues, clustering around the centre but including people with viewpoints ranging from strong economic liberalism all the way through to high levels of protectionism. For this group, the economy is less important than culture.

- **Progressive professionals (20% of the population):** Concentrated amongst AB workers (34%) and C1 workers (29%), progressive professionals are highly educated with 38% holding a degree, though they are less geographically concentrated than other highly-educated groups, and nearly equally distributed across age groups. There are more women in this group (55%) than men (45%) and around 60% own their home, half (31%) with a mortgage, and half (30%) outright.

Despite holding a similar set of policy views to metropolitan liberals, Progressive professionals appear to have quite different politics. On the one hand, despite being very pro-Remain with 52% supporting staying in the EU and 26% supporting leaving, their views on this are less strong than metropolitan liberals. This permeates into their voting behaviour as well; 25% supporting the Conservatives compared to 30% for Labour and 16% supporting the Liberal Democrats.

In many ways these appear to be exactly the kind of swing votes that the Conservatives attempted to win over in 2010; torn between economic interest and their liberal values, they take traditionally liberal stances on immigration and drug legalisation, but many also lean right on issues of lower taxes and economic self-reliance.

- **Traditional Tories (15% of the population):** The distinguishing factor for Traditional Tories appears to be home ownership; nearly seven in ten own their own house, either outright (36%) or with a mortgage (33%). This may be a function of their age; over two thirds (67%) of the group are over the age of 45, with over a quarter being aged 65 or older. They were otherwise demographically indistinct, being gender balanced and having a class composition similar to national averages.

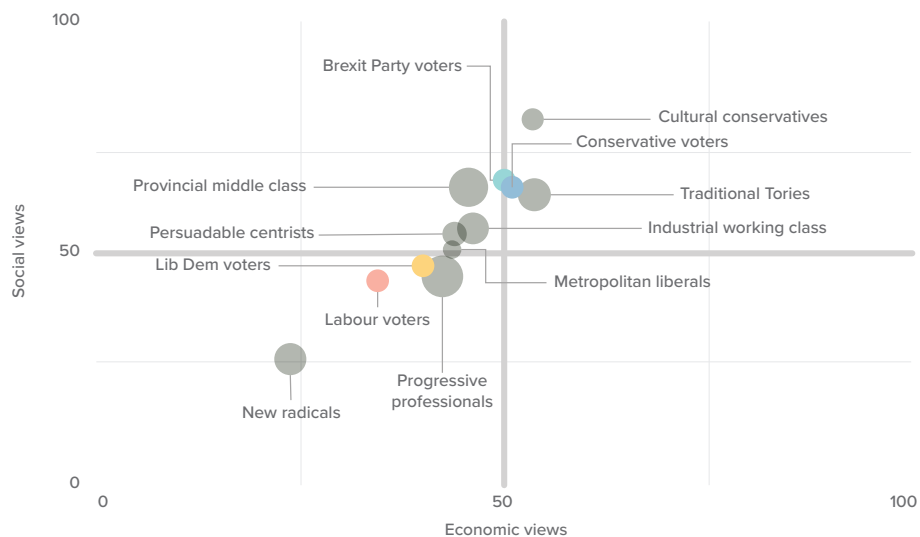
Unsurprisingly Traditional Tories strongly support the Conservatives; 56% voted for them in the last election and only 11% supported the Labour party, just one percentage point higher than the proportion who indicated they were not intending to vote. They also supported Leave by a margin of nearly 3:1, with 62% supporting Leave compared to only 21% who supported Remain.

Their core values reflect this political behaviour. Only 6% are positioned anywhere on the bottom-left quadrant of economic interventionists and social liberals, whereas 54% are economically interventionist and socially conservative. They have a similar range of views to Cultural conservatives on economic matters – generally leaning to the right on issues like “big government”, benefits, and income inequality. However, they are more likely to be moderately conservative on social issues.

## How should parties respond to Britain’s new political tribes?

In Figure 45, we place these tribes on a left-right spectrum across social and economic axes. The size of the bubble gives an indication of the number of voters represented by each tribe and the parties are located by their mean values.

**Figure 45: The economic and social positioning of Britain’s electorate**

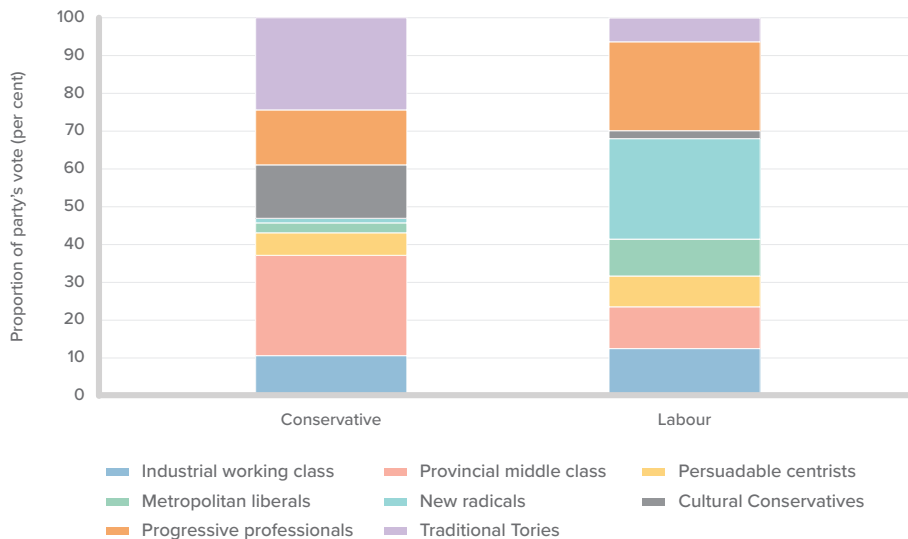


Source: Onward Analysis, Hanbury Strategy polling, wave 1 and wave 2.

- The graph confirms that the common ground of British politics is located slightly to the left on economics and slightly to the right on social and cultural issues. It also serves to demonstrate the importance of this positioning to the Conservatives, who relied heavily on groups such as the industrial working class and provincial middle class to win a majority in 2019.
- The Conservatives are most closely aligned in values terms with Traditional Tories (15%) and the Industrial Working Class (14%). Persuadable Centrists (11%) and Provincial Middle Class (18%) are within reach if the party maintains a slightly left of centre position on the economy and right of centre pitch on social and cultural issues.

- The Labour Party and the Liberal Democrats are located in the bottom left hand quadrant, representing social liberalism and left-wing economic views. This is an area without majority appeal. Although New Radicals (11% of the population) could be consolidated within one party alongside Progressive Professionals (20%), there are no other groups that share this complexion of views across both social and economic issues. Labour now relies on New Radicals for 27% of its support – larger than any other group.
- If Labour continues its path to the left on both social and economic issues it will be moving further away from the electorate, limiting its potential appeal. As Labour Together also found, the Party’s core vote of social liberals only accounts for a fifth of the total electorate. In short, Keir Starmer needs to broaden his party’s coalition, and appeal, if Labour is to ever win a majority to govern.

**Figure 46: Composition of Labour and Conservative coalitions by LCA groupings**



Source: Onward Analysis, Hanbury Strategy polling, wave 1 and wave 2.

One of the lessons of the 2019 election was that parties which are willing to respond to changing public opinion will be handsomely rewarded at the ballot box, as the Conservatives showed by taking the common ground. The result is an electorate that has much more in common with the Conservatives than any other party, whilst much of Labour’s support comes from an outlier minority.

The challenge for the Conservatives is whether they can maintain over a five year term an economic position that is arguably further to the left of any government since the 1980s with a socio-cultural position that many modern liberals may find uncomfortable.

The question for Labour by contrast is whether they are willing to change direction to rebuild a coalition in the common ground of public opinion, or whether they continue to pursue the politics of the New Radicals at the cost of a parliamentary majority.

# Conclusion



In the aftermath of elections, it is easy for convenient myths to become established truths. There are many on the Left and Right who believe that the 2019 General Election result was spontaneous and momentary: a unique confluence of a prolonged Brexit, a hapless Opposition and a slick Conservative campaign.

It is true that all of those factors played a role in delivering the historic result in December. But such a view underestimates the longer-term demographic and geographic realignment in British politics that became visible last year, with the implicit expectation that our political landscape will snap back to its previous form in future contests. This is wishful thinking.

The Conservative Party has been becoming steadily more representative of older, more working class, and less educated voters, including those in the North and the Midlands for several elections. In the “old money” terminology of the post-war period, it has moved right on culture and left on the economy. If it wants to defend its majority, it should stay there, however uncomfortable that is for the more laissez-faire within its number. But it must simultaneously act to treat the allergic reaction to conservatism spreading among younger voters.

Meanwhile the Labour Party has become increasingly young, metropolitan and well-educated – embracing radicalism on both cultural and economic issues to sustain the new coalition. As the election result and the data in this report suggests, there may be natural limits to the potential reach of this strategy. As Keir Starmer settles into his role as Leader of the Opposition, and we look ahead to 2024, he ought to think carefully about how to reconcile the social traditions of the Party’s working class roots with the liberalism of young new radicals. Success or failure in this task will determine whether Labour can once again become genuinely electable.

Whatever happens, we are unlikely to go backwards. The 2019 General Election changed politics for good.

# Methodology



The Onward General Election Study relied on four core methods to produce the findings within this report:

- Two large-scale surveys conducted at the beginning and the end of the campaign, with significant resampling so that changes in opinion amongst the same individuals could be tracked.
- MRP analysis testing predicted results at the beginning of the campaign, and estimated results if people voted for their favoured party without tactical or location-based constraints.
- Regression analysis of seats estimated support levels for each party depending on demographic factors, and identification of seats where parties were over or under-performing relative to expectations.
- Ad-hoc modelling of estimated seat impacts if swing to or from parties varied depending on different scenarios.

Each of these approaches is summarised below. For further detail, or queries, please contact the authors using the email address [office@ukonward.com](mailto:office@ukonward.com)

## Large-scale surveys

Onward commissioned Hanbury Strategy to carry out two large-scale surveys at the beginning and the end of the campaign period respectively. The design of these surveys was identical and the sampling was such that approximately 67% of those in wave one were sampled again in wave two, so that movements during the general election could be tracked.

The survey asked a suite of questions that included demographic characteristics, voting behaviour, expectations of the results of different parties winning or losing the election, perspectives on political leaders, and a wider battery of questions on policies, values, and the decision-making architecture that people were using to make up their mind. In addition, specific questions were asked around both the factors that might affect voting behaviours – such as weather and darkness, and also the parties that each respondent would vote for in an ideal situation.

Fieldwork for the first survey, with 4,000 respondents, was conducted between the 6th and 8th of November 2019 and weighted, alongside demographic variables, to 2017 vote history. Fieldwork for the second survey, with 8,000 respondents, was conducted between the 3rd and 7th of December 2019, with results then reweighted to reflect the outcome of the 2019 election.

In total around 67% of respondents from wave one were sampled again in wave two meaning that there was a pool of just under 2,700 individuals that could be analysed in both waves. These findings were used to understand and measure opinion at both points, as well as to compare, although attrition in the pooled sample between two waves means vote totals may not exactly reflect the final result.

## MRP analysis

Voting intention and history data from both waves was used as an input into Multiple Regression with Poststratification (MRP) estimates conducted by Focaldata which produced seat-by-seat estimates of the results using each set of data.

Two sets of MRP estimates were produced. The first, using voting intention data from the first week of the campaign, was used to create an estimate of the initial state of play at the beginning of the election. The final results were compared against this to understand the seats which may have moved in and out of each party's control as a result of movements during the campaign.

The second MRP was conducted using responses from wave two. However, instead of using normal voting intention data, it used the record of each individual's 'ideal' voting preference. The inferred differences between these results and the actual results provide estimates of the proportion of votes in each constituency which were due to "contract voting" and, crucially, the seats where this might have made a difference to the result.

## Regression analysis based on demographic data

In addition to data generated from the poll, analysis was also conducted on the election results themselves and their relationship to other factors within constituencies such as average age, sex distribution, support for leave or remain, and education levels. A basic regression analysis with the level of support for each party in 2017 as the dependent variable was then conducted to produce estimated levels of expected support for parties within constituencies.

These figures were then compared to actual levels of support in order to assess the degree of overperformance or underperformance, and therefore constituencies in which parties could be expected to improve their performance. This exercise was then repeated again using the results of the 2019 election to identify areas of potential further gains, and losses, for each party.

For the majority of this analysis Scotland was not included in the calculations due to the combination of a smaller number of seats and the unique political circumstances making it difficult to model expected performances.

In addition, a similar method was employed to estimate the individual impact that various demographic factors had on the likelihood of an individual within the survey data voting for either the Conservative Party or the Labour Party. This combined demographic factors with others such as issue salience in order to control for the relationship between demographics and social views and, crucially, to isolate which factors had the largest individual impacts.

## Ad-hoc modelling

Several additional questions were raised within the study, including the likely efficiency of different voting coalitions and the relative strengths or weaknesses of parties' positions. To estimate these impacts we used a variety of different swing models.

To understand the relative weakness of the Conservative position we estimated the impacts of gradual increases in uniform national swing from the Conservatives to the Labour Party to understand the level at which the Conservatives would move from government to having no majority. This represented the 'upper' bound of the national change in vote share required for this situation. The 'lower' bound was calculated by taking the total minimum number of votes required for the Conservative party to lose a majority and dividing this by the total number of votes.

To determine the estimated impacts of the consolidation of the left/liberal vote we created a model which would, in small iterations, transfer a portion of the Liberal Democrat, Green, SNP and Conservative votes to the Labour Party. This proportion was randomly generated based on how pro-Remain an area was and the iteration of the model being run, with earlier iterations being on average lower as a party struggled to gain traction, a 'peak' as it did, and then declining conversion as they exhausted the supply of potential converts.

This model was then run several times for 200 iterations, with the estimated seat total at approximately 44% of the vote (the high point for Tony Blair's election victory) being calculated as the upper limit. The model estimated that, given the current political geography, Labour would need to win over 50% of the popular vote to secure a majority.

Last, to test the efficiency of different voting coalitions we took the average level of regional support for each party in each cycle. To estimate the impacts of, for example, transposing the 2019 coalition onto the 2015 result, we then adjusted all the 2015 results for each seat in each region by the appropriate regional modifier to bring it in line with the expected 2019 results; so all seats in, for example, the North East would be adjusted by a specific level of regional swing. This provided an idea of the overall impacts of each geographical profile of support that each electoral coalition received.

# Endnotes



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- 18 This was achieved using MRP projections by Focaldata at the beginning of the campaign which estimated the level of support in each constituency for each party. These were then compared to the actual results.
- 19 [www.britishelectionstudy.com/bes-findings/women-men-and-the-2017-general-election-by-jane-green-and-chris-prosser/](http://www.britishelectionstudy.com/bes-findings/women-men-and-the-2017-general-election-by-jane-green-and-chris-prosser/)
- 20 *Onward analysis, Hanbury Strategy polling data, wave 1 and wave 2.*
- 21 British Election Study, *Explaining Voter Volatility: A summary of the British Election Study*, BES, 2019.
- 22 A majority of 12.6% implies that a swing of 6.3% from Conservative to Labour would lose them the seat. The residual (11%) is larger than the required swing.
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- 25 Our model assumes that the Labour party wins approximately 55% of total possible 'liberal' voters, drawing primarily on Liberal Democrat voters, Green voters, and also a small amount of liberal-leaning Conservatives. This would, at a vote share equivalent to c. 43% of the national public, on 260 seats. A majority would require them to win over 50% of the public vote.

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