

# Breaking Blue

Why the Conservatives suffered a catastrophic  
defeat and the route back



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# About Onward

Onward's mission is to develop bold and practical ideas to boost economic opportunity, build national resilience, and strengthen communities across all parts of the United Kingdom. Our vision is to address the needs of the whole country: young and old, urban and rural, for all communities across the UK – particularly places that have too often felt neglected or ignored by Westminster.

We believe in an optimistic conservatism that is truly national – one that recognises the value of markets, supported by a streamlined state that is active not absent. We are unapologetic about standing up to vested interests, putting power closer to people, and supporting the hardworking and aspirational.

We do so by developing practical policies grounded in evidence. Our team has worked at high levels across Westminster and Whitehall. We know how to produce big ideas that resonate with policymakers, the media and the wider public. We work closely with policymakers of all parties to build coalitions of support. Most importantly, we engage ordinary people across the country and work with them to make our ideas a reality.

## Thanks

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# Executive summary



## **The Conservatives suffered a once-in-a-century loss in every direction**

The 2024 general election was catastrophic for the Conservative Party. It lost especially heavily due to a huge national swing against it, with half of its 2019 vote disappearing. Its coalition fragmented in all different *directions* - to Labour, the Liberal Democrats, Reform and to those not voting. It lost support for many reasons, including the behaviour of MPs and leaders, the failure to deliver on pledges - particularly over immigration, the health service and tax - and the impact of external shocks like the Covid pandemic and Ukraine war derailing the 2019-24 Parliament.

The swing against the Tories was across all major demographic divides - age, Brexit preference, home ownership, education level, social grade, and previous voting pattern. But due to Britain's first past the post electoral system, some of the voters that deserted the party matter more when it comes to share of parliamentary seats.

By far the biggest defection was to Reform UK, which won nearly a quarter of 2019 Tory voters, slicing Conservative majorities and handing dozens of seats to Labour in Tory-Labour marginals. At the 2019 election the Conservatives gained two thirds of those who voted both Ukip in 2015 and Leave in 2016, but only held 10% of these voters in 2024, with 76% backing Reform. But the party has also retained just 60% of Conservative Remainers (those who backed David Cameron in 2015 and Remain in 2016). It has therefore lost significant numbers of voters on both sides of the referendum divide.

The Conservative vote collapsed in every direction. In short, everything that could go wrong did go wrong. There is not one principal factor to explain the result. After such a comprehensive defeat, it simply can't be taken for granted that the Conservative Party will bounce back. The age of when voters are more likely to vote Conservative has risen to 64 years old. The demographic pressures require radical change. The Party faces a sink or swim moment: be honest about the result, make the right choices and there is a clear route to come back in five years. But fail to face up to the challenge and the party could easily disappear.

## **The party lost voters with electorally crucial "super-demographics"**

Labour barely increased its vote share in this election, but its vote became hugely more efficient across constituencies. It did this in part by winning over people with demographic characteristics which are disproportionately important in a first past the post electoral system ("super-demographics"). *Breaking Blue* identifies these voters with a differing combination of demographic traits (voters that are older, outright home owners, Brexit-supporting, without a university degree, of C2 social grade and living in less dense constituencies) who are unusually important in

deciding the result of elections, because they are so efficiently distributed across the country they have the power to influence the outcome in a large number of constituencies.

These voters with super-demographics have historically been more likely to be Conservatives, but they deserted the party in 2024 on a proportional swing - with catastrophic electoral consequences. To recover, the Conservatives must win back voters with these super-demographics. What such a recovery looks like is clear, because Labour achieved this in Scotland at the recent election where only a six point lead against the SNP produced a disproportionately good outcome. The Tory super-demographic voters were more likely to have deserted the party for either Reform UK or the Liberal Democrats, but are the most efficient place for the party to start its fight-back.

### **Short and long-term causes of the defeat**

The short campaign in 2024 was unsuccessful for both main parties, but the local elections of May 2024 gave a clear indication that the Conservative Party was on course for a landslide defeat before the election was even called. Previous modelling suggested that the Conservatives were on course for around 160 seats in May, some 40 seats higher than the eventual 121 tally.

The campaign itself made a bad situation worse. Negative stories for the Conservatives cut through to shape voters' behaviour, including Rishi Sunak departing D-Day early and the 'Gamblegate' revelations of senior Conservative aides betting on the timing of the election. Voters tended to see the campaign through Labour's narrative framing as being about change and ending the chaos.

In the medium-term, anti-incumbency was a huge factor, with significant tactical voting by Labour and Liberal Democrat supporters to remove the Tories from office. Perceived incompetence, division, lack of delivery, broken promises from the 2019 manifesto, "Partygate", PPE corruption scandals and the short government of Liz Truss proved lethal for the party's poll position. Positive achievements for the party – such as the initial Covid response, the vaccine rollout and delivering Brexit all faded away in salience. After the Truss mini-budget, the poll deficit became exceptionally difficult to recover from. To regain power, the Conservatives must learn from these lessons and, first and foremost, win back trust and a reputation of economic competence.

### **The party's 2019 ideological coalition broke up**

*Breaking Blue* examines the British electorate by political values, classifying them into seven segments: Thatcherites, Christian Democrats, Right-Liberals, Social Democrats, the Traditional Left, the New Left and the Mainstream. It reveals that winning coalitions are built when one of the major two parties wins its own base (the

right-leaning segments for the Conservatives, the left-leaning segments for Labour), together with a plurality of Mainstream voters and some inroads into the other side's base.

Tony Blair, for example, carried Social Democrats, the New Left, the Traditional Left and the Mainstream, while also making inroads into economically right-wing Right-Liberals. In 2019 Boris Johnson achieved the opposite: solidifying Thatcherites, Christian Democrats and Right-Liberals, won the Mainstream, and - crucially - massively increasing his support among the Traditional Left, who have historically been Labour voting but also strongly backed Leave.

### **The party must build a sustainable ideological coalition**

But there is a longer term challenge, too. Based on the segmentation analysis of voters going back to the 1980s in Chapter 4, we found that the 2019 Conservative coalition was ideologically broad – as all winning electoral coalitions have to be – but contained inherent tensions that would need to be managed in government. In particular, it included voter segments with either conflicting cultural or economic values.

For example, Right-Liberals (combining economically right-wing and socially liberal beliefs), largely backed Remain, but stuck with the Tories in 2019 out of opposition to Jeremy Corbyn. At the same time, Traditional Left voters (combining economically left-wing and socially conservative beliefs) lent their vote to the Conservatives over Brexit in 2019, despite historically backing Labour.

Managing to hold together this electoral coalition was a difficult proposition given that the glue of anti-Corbyn and pro-getting Brexit done was gone by 2024, but could have been possible with the right policies, successful implementation and a stronger economy. But we show how this electoral coalition disintegrated over the course of the last parliament. What happened in July 2024 was a simultaneous collapse of different voter blocs.

Therefore to build a coalition to win a majority in the future, the party must focus on rebuilding the electoral coalition of segments that helped Thatcher, Major, Cameron and Johnson to victory. This is to combine strong support amongst segments that have historically leaned right on either their economic or cultural beliefs with plurality support amongst Mainstream swing voters.

### **Priorities for the new leader**

The Conservatives are in the midst of picking a new leader and they will have a short window to make an impression. An overwhelming theme of *Breaking Blue* is competence and trust. This is not only down to the scandals associated with Boris Johnson's Government or the economic decisions of Liz Truss, which made a

recovery for Rishi Sunak essentially impossible. Yet his period in government and the short election campaign failed to improve a bad situation.

Voters across all voting patterns and ideological persuasions felt let down by the last Conservative government, concluding that it had simply not delivered on its promises, with both Truss and Sunak moving away from key aspects of the 2019 mandate especially on economic policy and immigration. However valid or invalid the explanations of the pandemic or the global energy crisis may be, voters still hold the party in power responsible.

Whether it is Kemi Badenoch, James Cleverly, Robert Jenrick or Tom Tugendhat, the first thing the public will notice is whether the Conservative Party is displaying the same erratic behaviour that was widely rejected at the last election. Many of the leadership candidates have spoken about unity, but unity for unity's sake is not enough. The next Conservative leader must demonstrate that the Conservatives are a coherent, serious political force offering a clear and differentiated message.

Immigration is, by far, the most widely cited area of policy dissatisfaction; this goes for voters across the Thatcherites, Christian Democrats, the Mainstream and the Traditional Left segments. But it is also the top priority for Reform and Liberal Democrat defectors. Those who switched to the Liberal Democrats are not, in fact, particularly liberal, but were motivated by factors such as anti-incumbency.

The NHS and public services are also major priorities, especially for the electorally important Mainstream, for Traditional Left voters and for Christian Democrats. These issues are vital for Liberal Democrat and Labour defectors and for those who did not vote. Competence and trust were huge factors across party political and segment divides.

The next Leader of the Opposition must focus initially on something akin to a classically Conservative pitch in the first instance, with the aim of winning back the super-demographics. This will be articulating that the Conservative Party is in favour of a streamlined state; that it is pro innovation, pro expanding the capacity of public services and pro immigration reform. This will also involve having to explain the lack of coherent or delivery under the last government. Lower taxes on the middle class and being tougher on crime are top-five priorities for voters who have backed the party at least once since 2015. The simultaneous desire of target voter groups for lower taxes and greater investment in public services will need to be addressed with a clear and honest position and message.

The Conservative support base is now the oldest it has ever been, with voters now only more likely to vote Conservative than Labour if they are 64 or above. It will need to address its demographic and generational "pipeline" problem by seeking to win back voters in their 40s and 50s as well as reaching out to younger voters.

Yet if it is purely a party of the past, it won't survive. The ability of Opposition politicians to shape the debate is infamously difficult, but it must take a clear stance on the issues that matter the most to voters. The party's voting base is the oldest it has ever been, and it must focus on winning back these older, more natural voters first. The party simply won't have any chance of winning again until it can convince 50-64 year olds to vote Conservative again. But it must also be thinking about a pipeline for winning over younger voters, as the second stage towards heading back to office. Showing integrity and building trust with those who have abandoned the party, and with mainstream voters will be a necessary - but not sufficient - condition for returning to power.

### **To win again, the party must focus on Liberal Democrat and Reform defectors**

The Conservatives must focus on the priorities of Liberal Democrat and Reform defectors in particular, together with those of 2019 Conservatives who did not vote in 2024. The party lost 23% of its 2019 vote to Reform, but to focus solely on Reform defectors would be a mistake - adding together every 2024 Conservative and Reform vote would still only produce 302 seats, 24 short of a majority. The party also lost 7% of its vote to the Liberal Democrats, and in electorally important seats. It must win back both Reform and Liberal Democrat switchers just to get to a hung parliament. Under first past the post, winning Labour defectors is more efficient, but they are far less likely to say they would consider voting Conservative again than those who switched to these two parties.

Some will argue these groups are fundamentally different. They are not. Liberal Democrat and Reform defectors are more similar to each other and to current Conservatives both in their political beliefs and their demographic characteristics than other supporters of their new parties. They tend to have more super-demographic markers, and they tend to be both more socially conservative and more economically right-wing. The good news is that voters who abandoned the Tories for Reform and the Liberal Democrats actually tend to have conservative values, including on immigration and crime.

### **Time and space**

The long leadership contest to replace Rishi Sunak has given the Conservative Party much time to ponder what went wrong in the 2024 election, which produced just 121 MPs, of which 26 were new. Much of the leadership debate has alighted on similar conclusions to *Breaking Blue* on how the party should rebuild. Yet whoever is picked on November 4 must make an immediate effort to rebuild the party campaign machine for the 2025 local elections, where Nigel Farage has stated Reform UK wishes to gain a serious foothold in local government.

If this were to happen, it is likely that Reform will become a permanent part of the UK's political system, making any return to government for the Conservatives much harder. Calls for a deal with Farage's party would grow, but this would be a huge error as it is unpopular with both current and target Conservative voters.

The Conservative Party should use the next six months to focus on policy and positioning to articulate what it thinks went wrong with how it governed Britain in the past, and the way forward. There will be no initial recovery without it. *Breaking Blue* sets out how and what the party should do now, to restore trust to the Conservative Party, regain a reputation on the policy areas that matter, and win back the voters who are most open to returning.

# The result

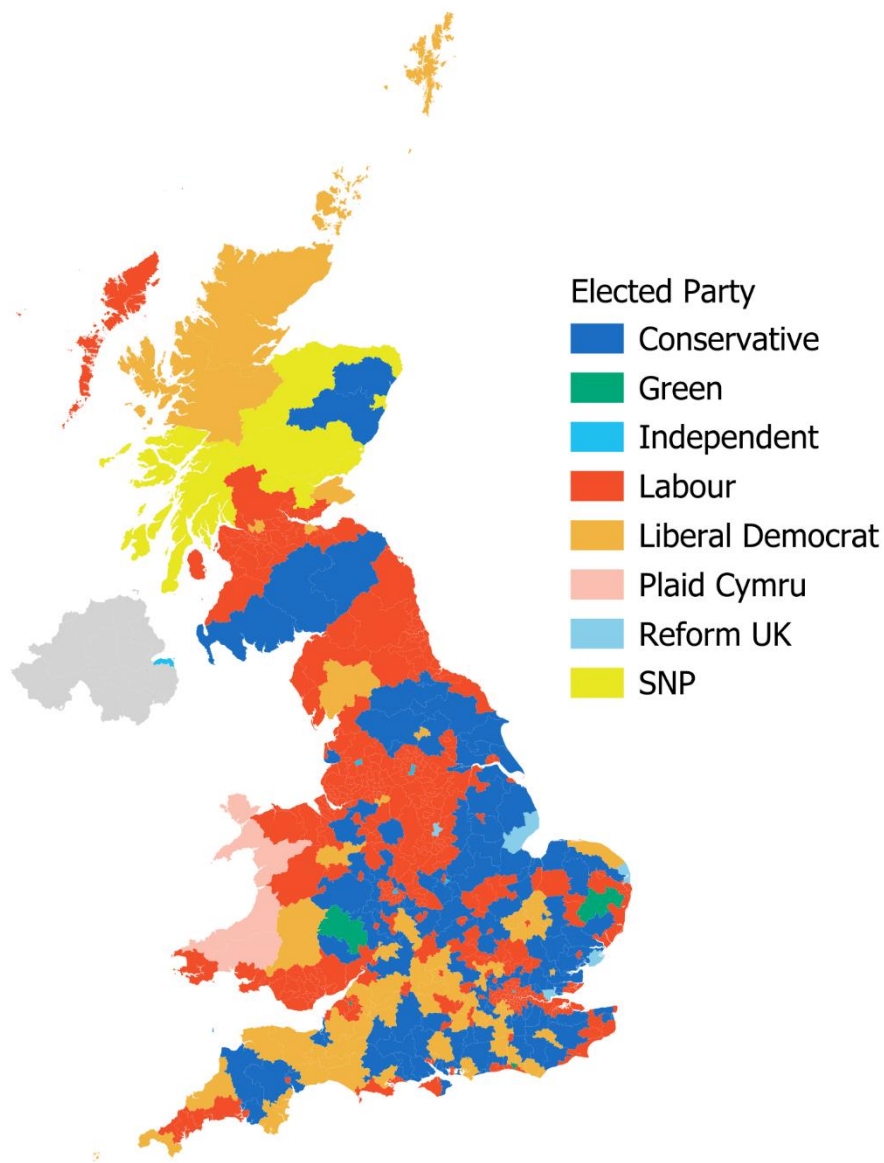


## Conservative seat losses in 2024

The Conservatives suffered a historic parliamentary defeat in the 2024 general election - the worst in its modern history, winning just 121 seats and losing 244. Labour won a 172-seat majority, securing 411 seats from just 33.7% of the vote. The Liberal Democrats gained 64 seats, up from just 15 - the highest number of seats since they were formed.

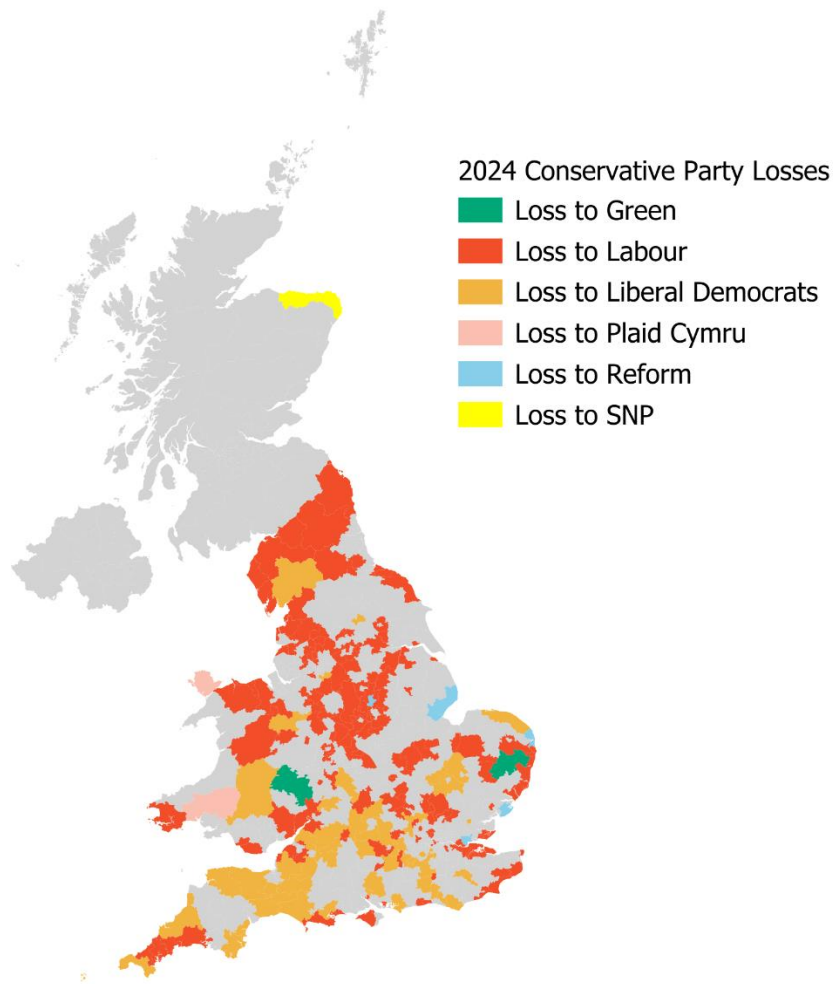
### Figure 1: 2024 general election results by constituency

Source: House of Commons Library, 2024 general election results



## Figure 2: 2024 Conservative Party losses

Source: House of Commons Library, 2024 general election results



## The flow of the vote

### The 2019 Conservative voter base collapsed

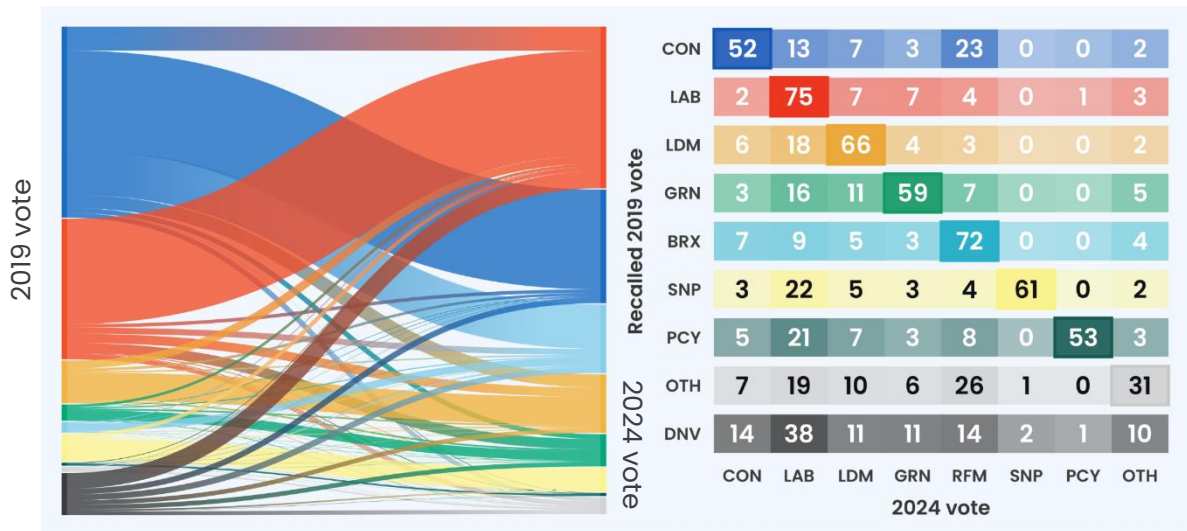
The Conservatives retained just half (52%) of their 2019 vote. Of 2019 Conservatives, 23% defected to Reform - by far the largest single voter destination. Meanwhile 7% defected to the Liberal Democrats and 13% to Labour.

Labour retained the majority of its (admittedly much smaller) 2019 vote (75%), while gaining 19% of the 2019 Liberal Democrat vote, 16% of the Green vote and 23% of the SNP vote in Scotland. Voter apathy was a further factor for the Tories, with 15% of 2019 Conservatives not voting at all in 2024 (“DNV”).

The 2019 Conservative vote base therefore collapsed in multiple directions at once - a four-way “pincer movement” on age, income, geography and Brexit preference. The overall result in vote share terms was therefore a huge Conservative defeat rather than a Labour victory, with Labour gaining less than a 2% increase in overall vote share but winning nearly two-thirds of parliamentary seats.

**Figure 3: Flow of the vote, 2019-24**

Source: Focaldata megapoll, 30<sup>th</sup> May – 1<sup>st</sup> July 2024

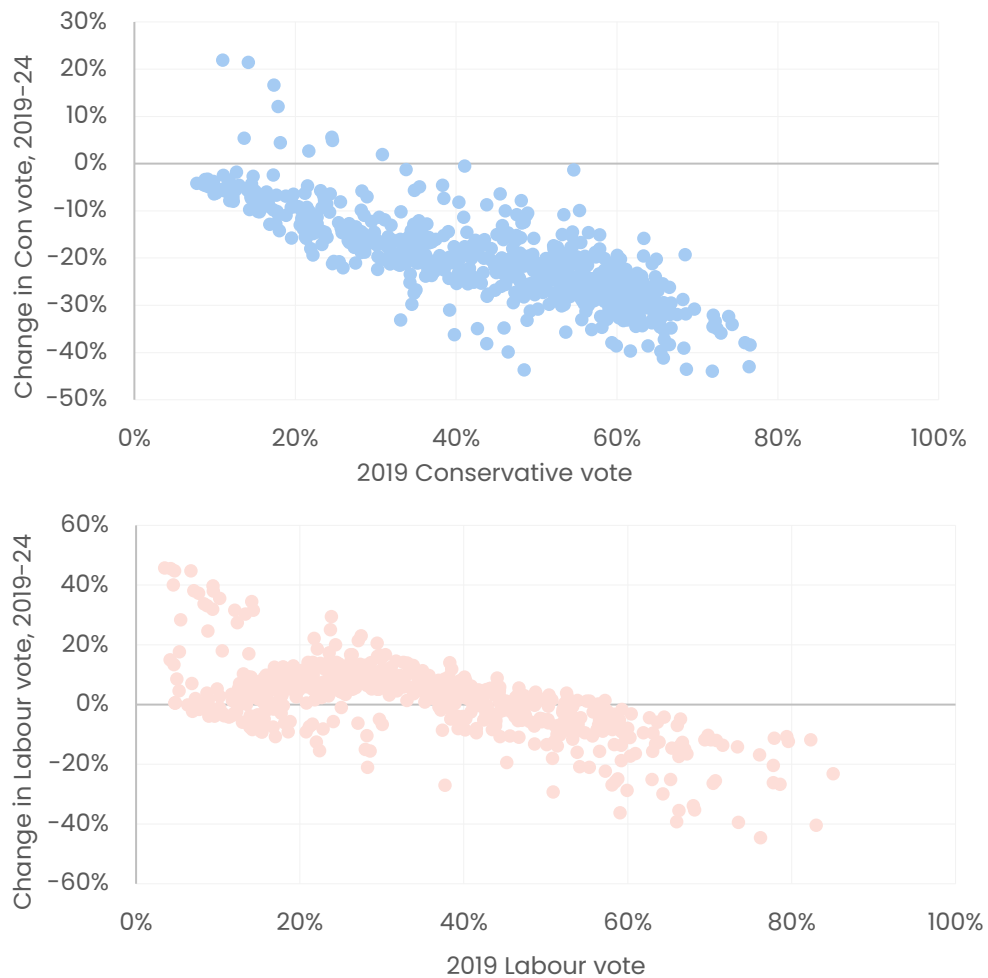


### Conservative losses were proportional

The largest reductions in Conservative vote share were in constituencies with the highest Conservative vote share in 2019. This was lethal for the party, as the Tory vote roughly halved in every constituency, dropping (for example) 30 percentage points in seats where the party previously held 60% of the vote. This has a much more electorally damaging effect than a uniform national swing.

#### Figure 4: Change in Conservative and Labour vote, 2019–2024

Source: House of Commons Library, 2024 general election results



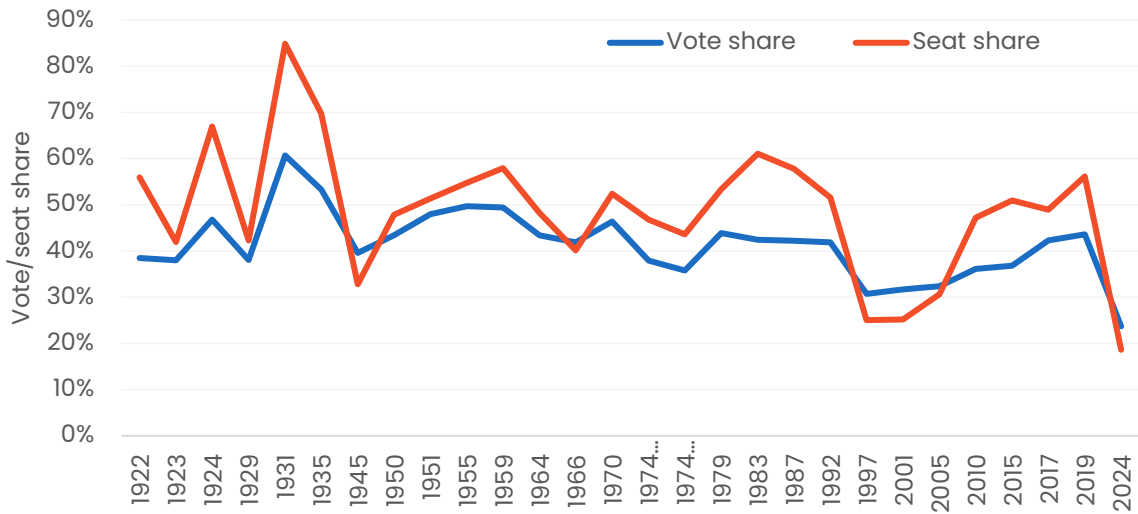
#### Seat and vote share for the Conservatives

##### The result was historically bad

The 2024 general election resulted in the Conservatives' worst ever seat share and vote share. The party won 44 less seats and 7% less of the popular vote than in 1997, the previous nadir of support. The gap between the Conservative and Labour vote share was large - similar to that in 1997. But the gap in seat share was larger because of the efficiency of the Labour vote. Rather than piling up all in seats where Labour was already likely to win as they had been doing in recent previous elections, this time it was spread optimally to gain seats. This meant that they could win 63.2% of seats with just 33.7% of the popular vote.

**Figure 5: Conservative Party vote and seat share, 1922-2024**

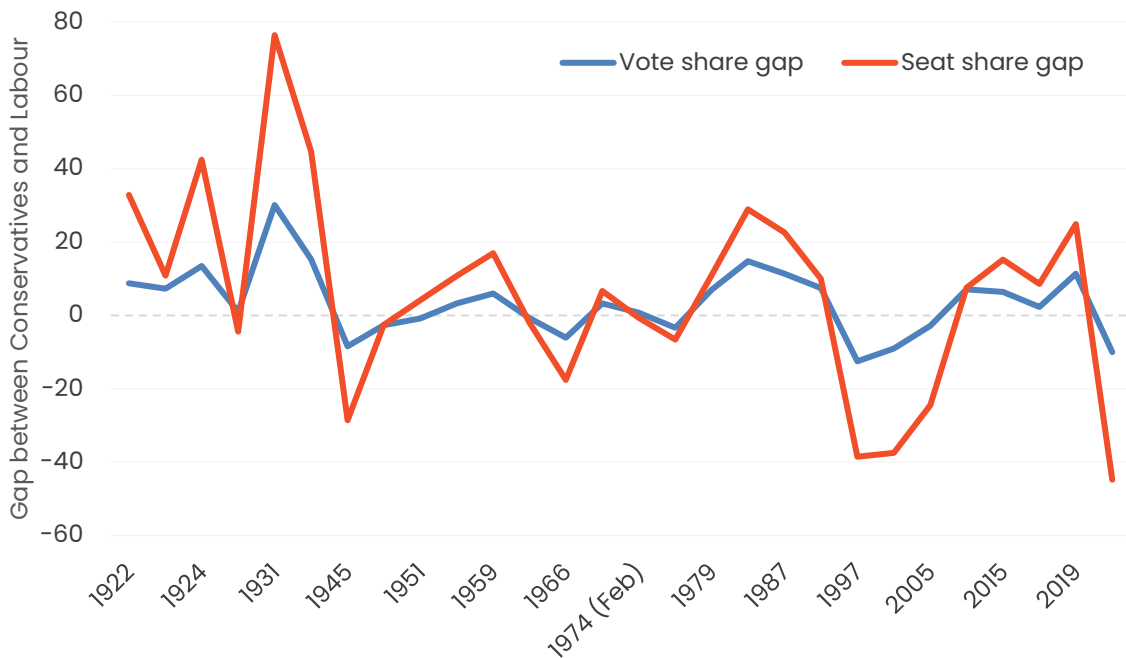
Source: House of Commons Library, UK Election Statistics: 1918-2023: A century of elections; House of Commons Library, 2024 general election results



While there was a decrease in the efficiency of the Conservative vote, with a negative gap between vote share and seat share, the efficiency of the Labour vote reached a record high.

**Figure 6: Efficiency of Conservative and Labour vote and seat share 1922 - 2024**

Source: House of Commons Library, UK Election Statistics: 1918-2023: A century of elections; House of Commons Library, 2024 general election results

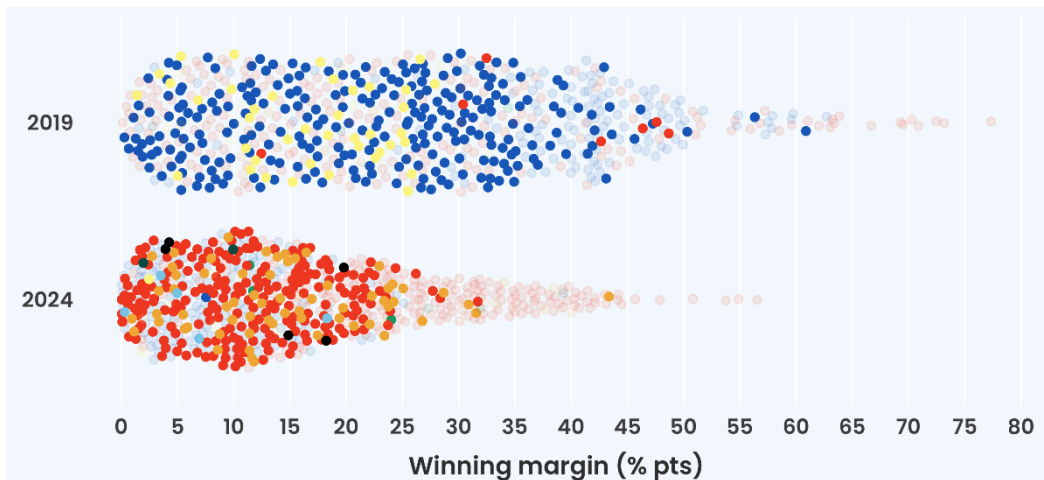


## The increasing marginality of UK elections

The 2024 UK general election was much more marginal than in 2019 - i.e. the result was decided by smaller margins in swing seats. The overall result therefore was decided by a small number of actual voters - the sum of Labour's seat majorities was just 161,691.

### Figure 7: Distribution of parliamentary seats by winning margin, 2019 and 2024

Source: House of Commons Library, 2019 and 2024 general election results



### “Uniting the right” would still not win a majority

Since the 2024 election, some have argued that the primary focus for the Conservative Party should be to ‘unite the right’ and strike a pact with Reform UK to bring together the right vote. But given the low Labour vote share and high marginality, “uniting the right” would not have produced a different result.

Aggregating the Conservative and Reform vote in each constituency would produce a total of 302 seats - significantly more than the current Conservative seat share, but still 24 short of an overall majority. This contrasts with the picture in 2019 when the combined Conservative and Brexit Party vote shares would have produced a landslide of 404.

An efficient Labour vote is not the only challenge facing the Conservative Party. It also suffered as a result of a very high vote share for left-of-centre parties. Importantly, not all voters for such parties share liberal or “progressive” values, explored in Chapter 4. But it remains clear that while uniting the right may be necessary, it is not sufficient for a majority, even if it were possible for the Conservatives to regain every Reform vote.

**Table 1: Aggregated vote shares with modelled seat share impact, 2019 and 2024**

Source: House of Commons Library, 2019 general election results; House of Commons Library, 2024 general election results<sup>1</sup>

<b>Winning Party</b>	<b>2019 Result (seats)</b>	<b>2024 Result (seats)</b>
Conservative + Reform/Brexit Party Vote	404	302
Labour	164	267
Liberal Democrat	11	46
SNP	48	7
Independent	0	5
Plaid Cymru	3	2
Green	1	2
Speaker	1	1

## **The demographic pincer movement**

### **Labour won among nearly all demographic groups**

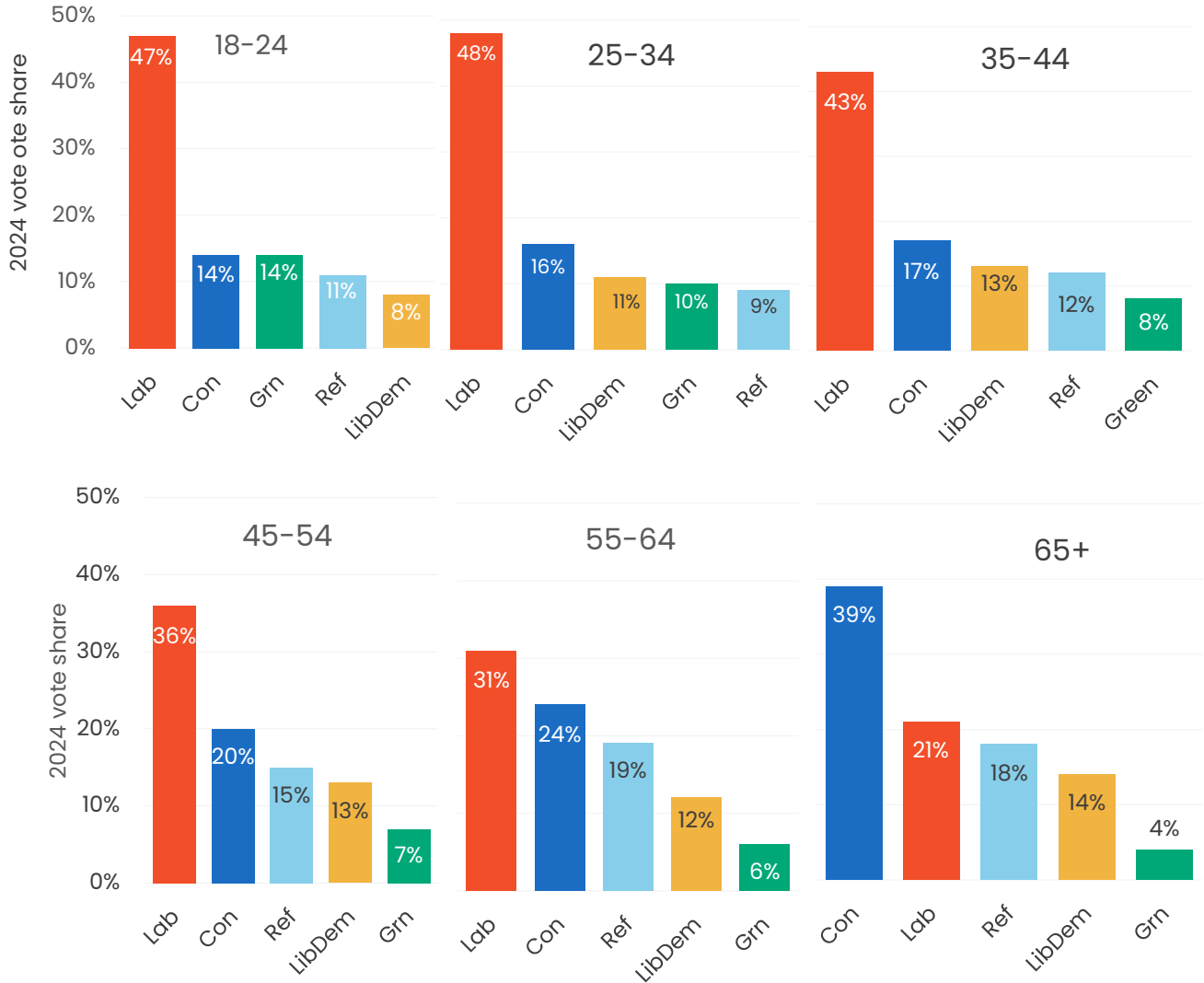
The Conservatives suffered a pincer movement on key demographics. It lost across a majority of age groups, with all social grades, across educational status difference and Brexit preference, and with all ethnicities. The party also lost some of its vote share among 2019 Conservative voters who are homeowners; this matters because the homeowner vote is efficiently distributed.

## The Conservatives are only popular among over-65s

The Conservative vote collapsed among all age groups, winning only over-65s. Its losses were largest among C2DE social grades, white voters and non-degree holders, and its vote collapsed among those who voted Leave in 2016. Among 2019 voters that defected to other parties, Reform was the most popular destination.

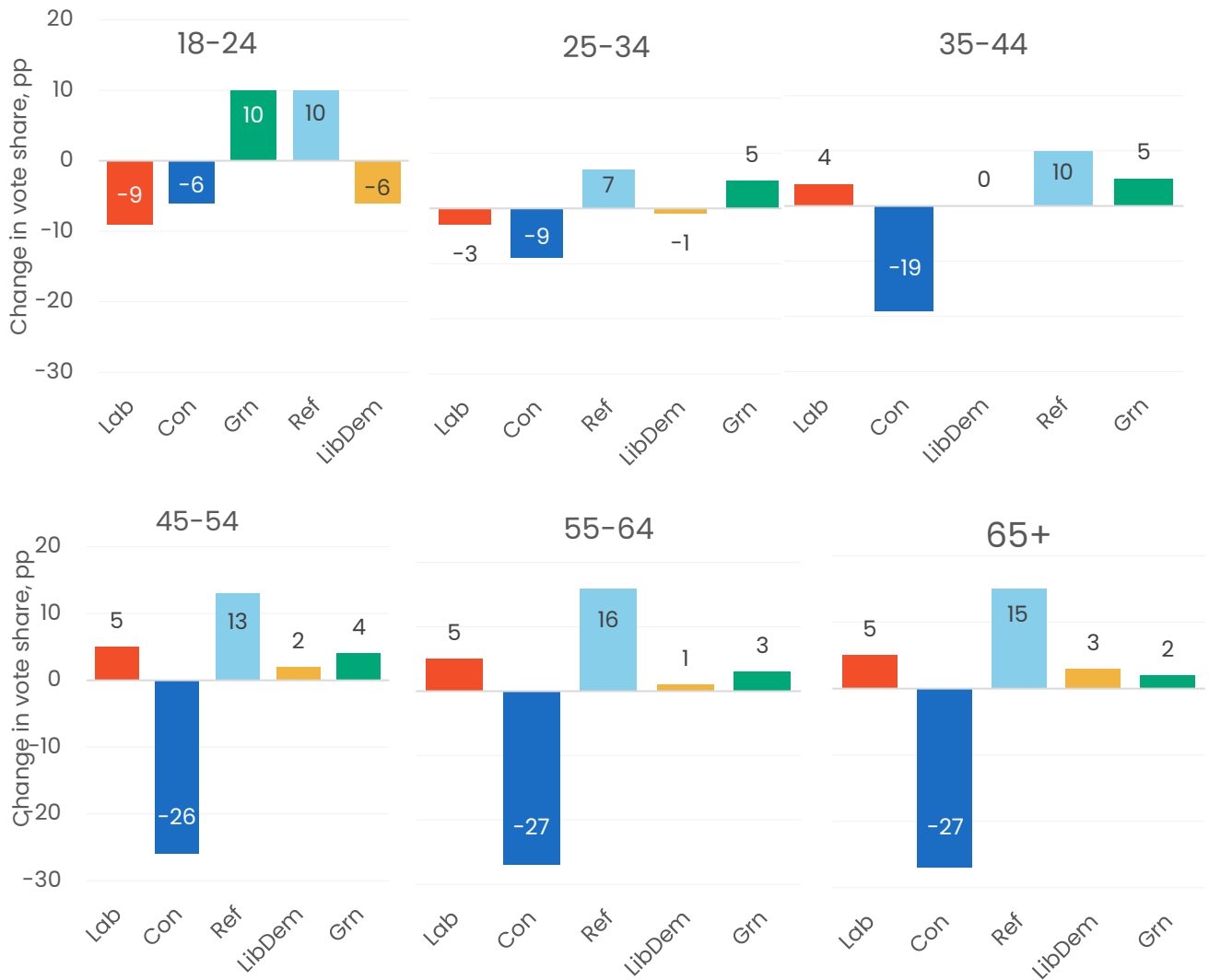
**Figure 8: 2024 vote share by age**

Source: Focaldata megapoll, 30<sup>th</sup> May – 1<sup>st</sup> July, 2024



**Figure 9: Change in vote share, 2019–2024, by age**

Source: Focaldata megapoll, 30<sup>th</sup> May – 1<sup>st</sup> July, 2024



Labour won a majority across all groups with the sole exception of over-65s. Even among 55-64 year-olds, Labour secured 31% of the vote, compared to just 24% for the Conservatives. Conservatives also reduced their vote share with every age group, including among voters over 65. Labour reduced their vote share slightly with 18-24 year-olds and 25-34 year-olds, which saw increases for both Reform and the Greens, indicating a degree of movement away from the two major parties.

Those who voted Conservative in 2019 and defected in 2024 did so to different parties based on their age. Younger 2019 Tories were more likely to switch to Labour, but these made up a smaller proportion of the Tory base. Older voters were less likely to defect at all, but given their proportional significance their defection rate had the largest impact.

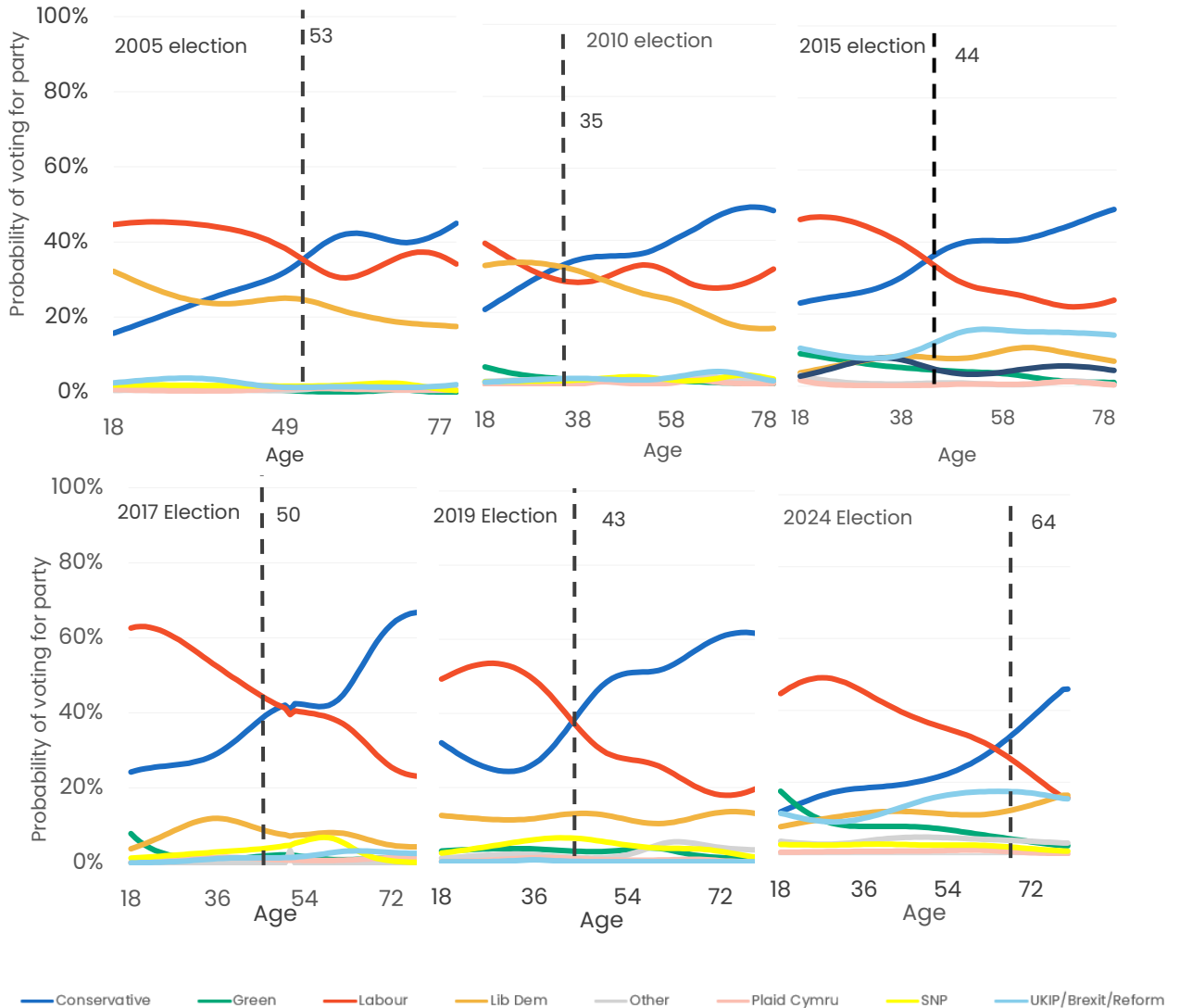
For all those aged 35 and above, Reform was the most popular destination for 2019 defectors. Of these, Reform were most popular with 55-64 year-olds.

### The Conservative vote was the oldest it has ever been

The Conservative vote is the oldest it has been since 2005. The age at which voters become more likely to vote Conservative than for any other party - the “cross-over” age - was at its highest ever level at the last election at 64 years old, 21 years higher than the cross-over age in 2019. This poses a serious demographic challenge for the Tories.

**Figure 10: Crossover age at each general election since 2005**

Source: Source: British Election Study Post-Election Face-to-Face Survey (2005, 2010, 2015, 2017, 2019),<sup>2</sup> Focaldata Megapoll

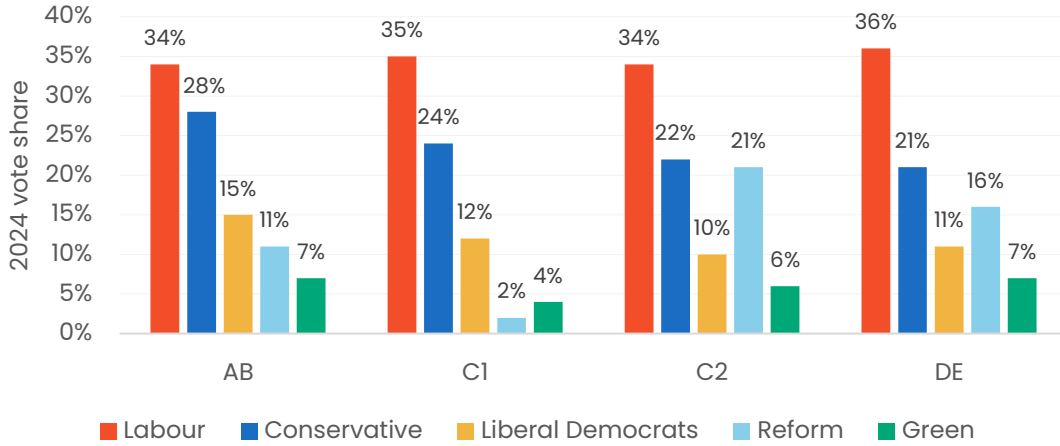


## The Conservatives lost many C2DE voters

Conservative support fell with all social grades, but their support declined most heavily among C2DE voters.<sup>3</sup> This group defected in large numbers to Reform. Even among ABs and C1s, support for Reform increased by 10 percentage points 13 points respectively.

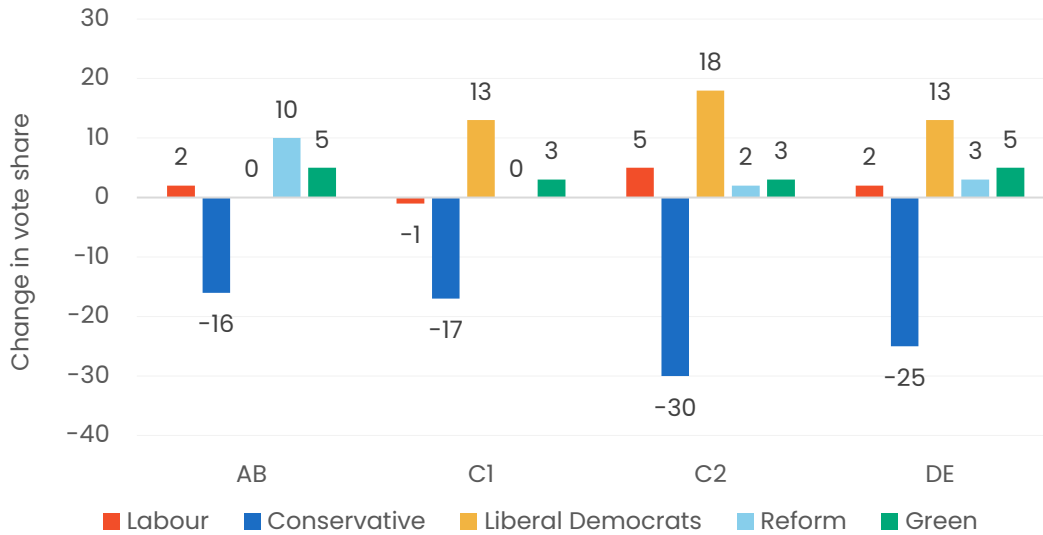
**Figure 11: 2024 vote share by social grade**

Source: Focaldata megapoll, 30<sup>th</sup> May – 1<sup>st</sup> July, 2024



**Figure 12: Change in vote share, 2019–24, by social grade**

Source: Focaldata megapoll, 20<sup>th</sup> May – 28<sup>th</sup> June, 2024



## The Conservatives went backwards with non-degree holders

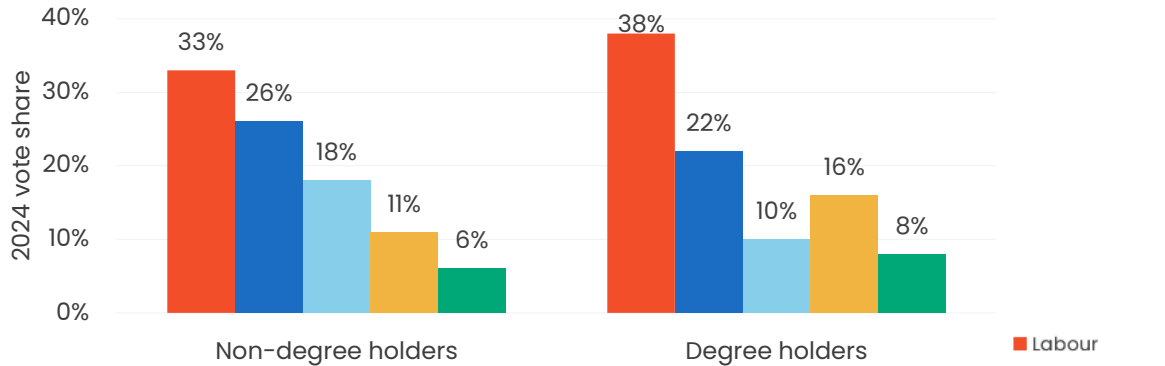
Labour won with both degree holders (16 point lead) and non-degree holders (seven point lead). But among graduates, both major parties actually went backwards. Conservative losses were greater, dropping eight points compared to Labour's four. Both Reform and the Greens increased their vote share with graduates.

However, among non-graduates the swing against the Conservatives was much bigger, with the party dropping 27 points while Labour gained five and Reform 15 points.

The positions of the Liberal Democrats and Reform were opposite for graduates and non-graduates: Reform won 18% of non-degree holders, coming third with this group, and the Liberal Democrats won 11%. Meanwhile the Liberal Democrats were third among graduates, winning 16% of this group while 10% went to Reform.

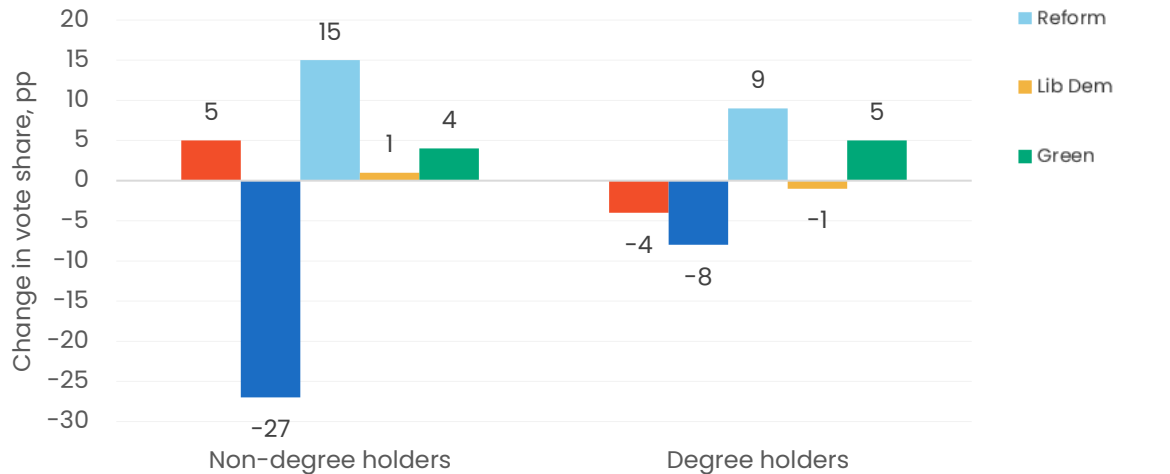
**Figure 13: 2024 vote share by education**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 14: Change in vote share, 2019-2024, by education**

Source: Focaldata megapoll, 20th May - 28th June, 2024



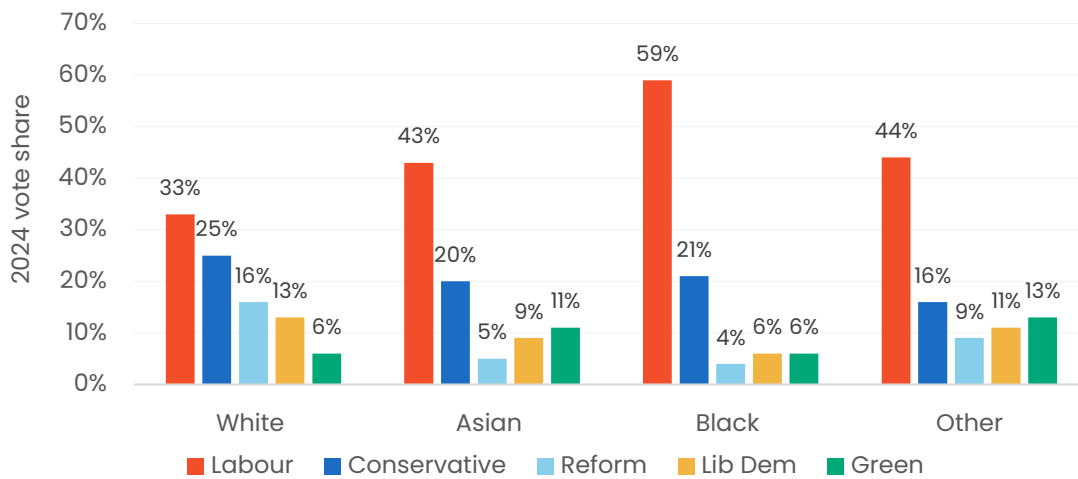
## The Conservatives lost across all ethnic groups

Labour won with all ethnicities, with a bigger lead among black and Asian voters, and a smaller lead among white voters (though this lead was still 8 percentage points).

While Labour still won a majority of every ethnic group, they went backwards among Asians (down 13 percentage points) and black voters (down six percentage points). Meanwhile, the Conservatives experienced little change with ethnic minorities but a major loss of white voters.

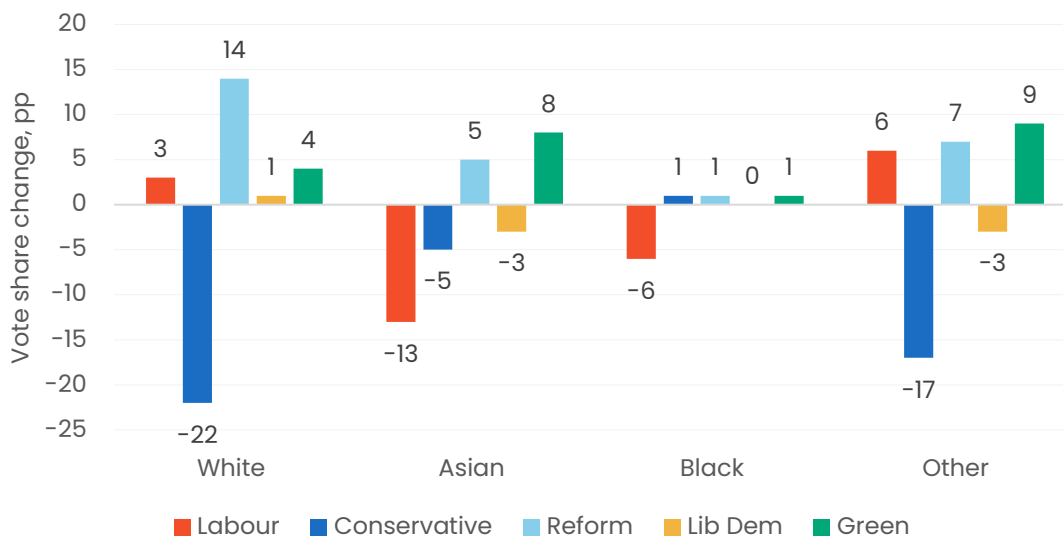
**Figure 15: 2024 vote share by ethnicity**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 16: Change in vote share, 2019–24, by ethnicity**

Source: Focaldata megapoll, 20th May - 28th June, 2024

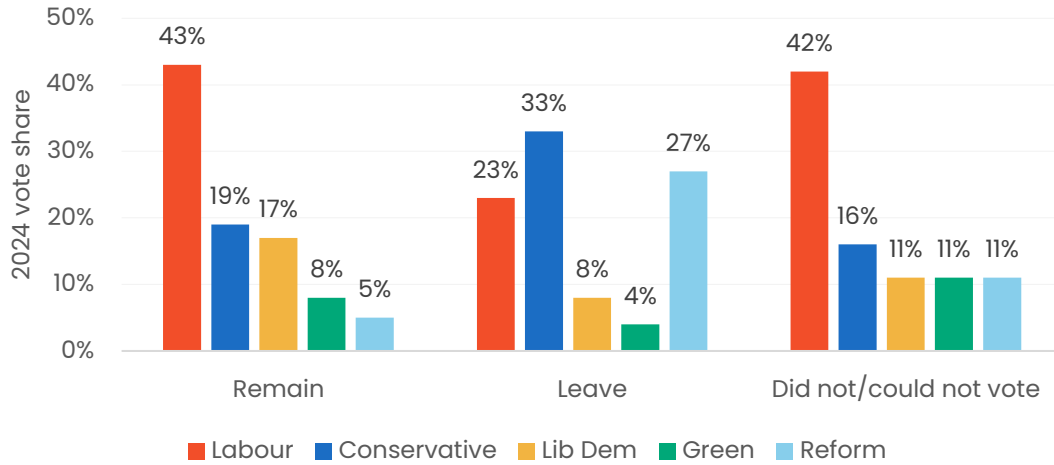


## The Conservative vote collapsed among Leave voters

Labour secured a clear majority of Remain voters (43%) while Leave voters were divided fairly evenly between the Conservatives, Reform and Labour. Meanwhile Labour had a large lead among voters who did not or could not vote in 2016 (due to age or migration status, for example).

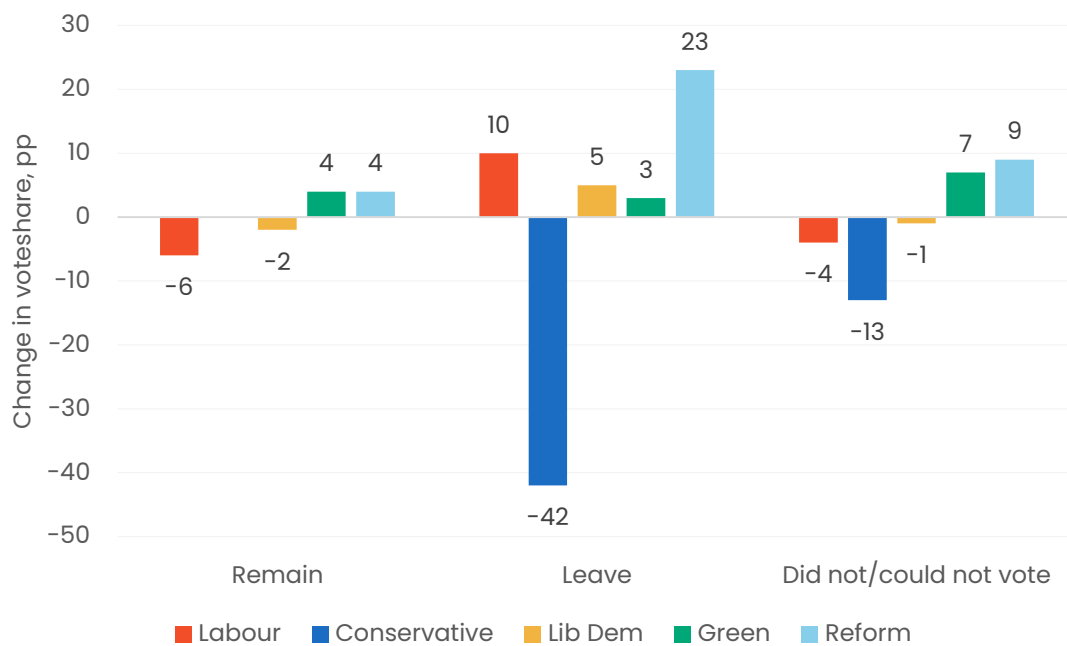
**Figure 17: 2024 vote share by recalled 2016 EU referendum vote**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 18: Change in vote share by recalled 2016 EU referendum vote, 2019-24**

Source: Focaldata megapoll, 20th May - 28th June, 2024



There was no change in support for Conservatives among Remain voters. This suggests that those who left the party due to Brexit had already done so by the 2024 election. Meanwhile, the Conservative vote collapsed among Leave voters, down 42 percentage points, with a 23 percentage point increase in support for Reform.

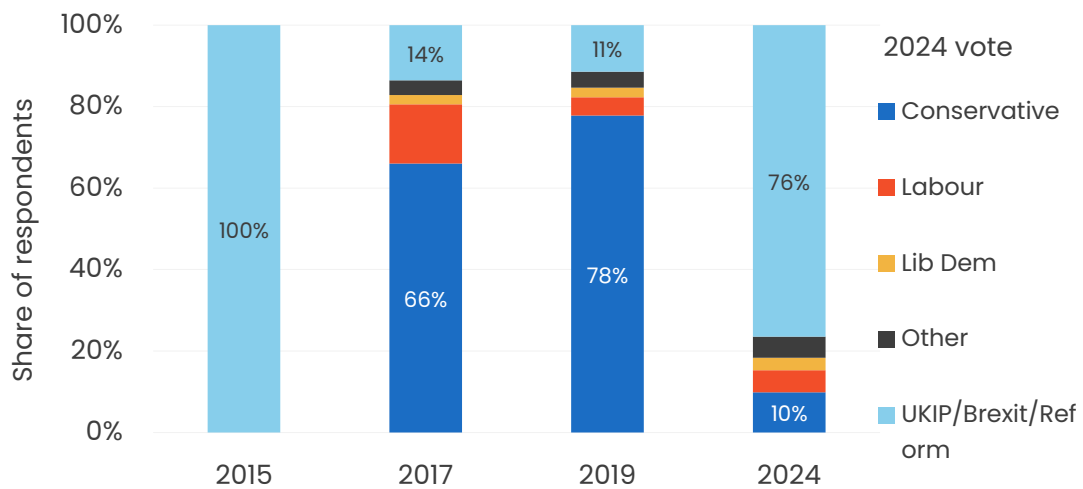
### The Conservatives lost the UKIP and Brexit Party vote

A major part of the 2024 election for the Conservatives is the evaporation of its support among strong Leavers. Of those who backed both UKIP in 2015 and Leave in 2016, 77% voted Tory in 2019 while Boris Johnson was pledging to “get Brexit done”.

Just 10% of those voters stayed with the Tories in 2024, with 76% defecting to Nigel Farage’s Reform. This is also linked to the decision of the Brexit Party to stand down in Conservative-incumbent seats in the 2019 general election, which placed a ceiling on the Brexit Party vote and channelled its support to the Tories. Most of the UKIP/Brexit Party vote has now gone to Reform.

**Figure 19: Voting behaviour of those who voted UKIP in 2015 and Leave in 2016**

Source: Focaldata megapoll, 20th May - 28th June, 2024



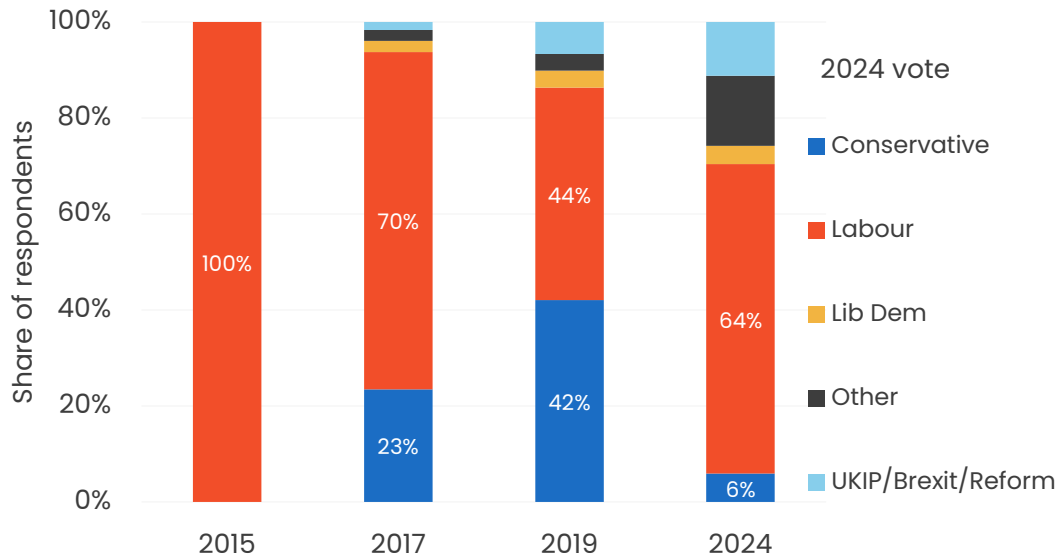
### Labour Leavers abandoned the Conservatives in 2024

Among “Labour Leavers” (those who voted Labour in 2015 and Leave in 2016), almost all the support the Conservatives managed to gain in 2019 (42% of Labour Leavers backed Boris Johnson) has now gone. 11% have defected to Reform and 64% have gone back to Labour. All gains with this group on the strength of Brexit have therefore been wiped out.

Labour Leavers are an important cohort in "red wall" constituencies that the Conservatives won in 2019 but subsequently lost in 2024. Their shift back to Labour highlights the “lent” nature of the Conservatives' Brexit-driven gains and the challenges in maintaining support from traditionally Labour-leaning voters.

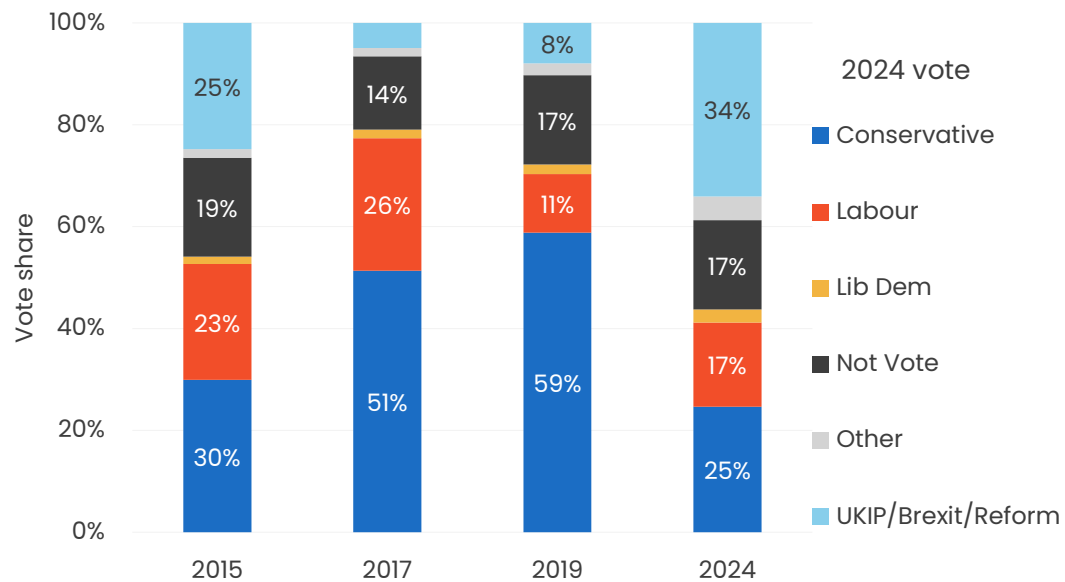
**Figure 20: Voting behaviour of those who voted Labour 2015 and Leave 2016**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 21: Voting behaviour of the “Workington Man,” 2015,2017,2019 and 2024**

Source: British Election Study Internet Panel Waves 6, 13, 19 and 29, December 2019 and July 2024



## Conservative Remain losses were largely priced in

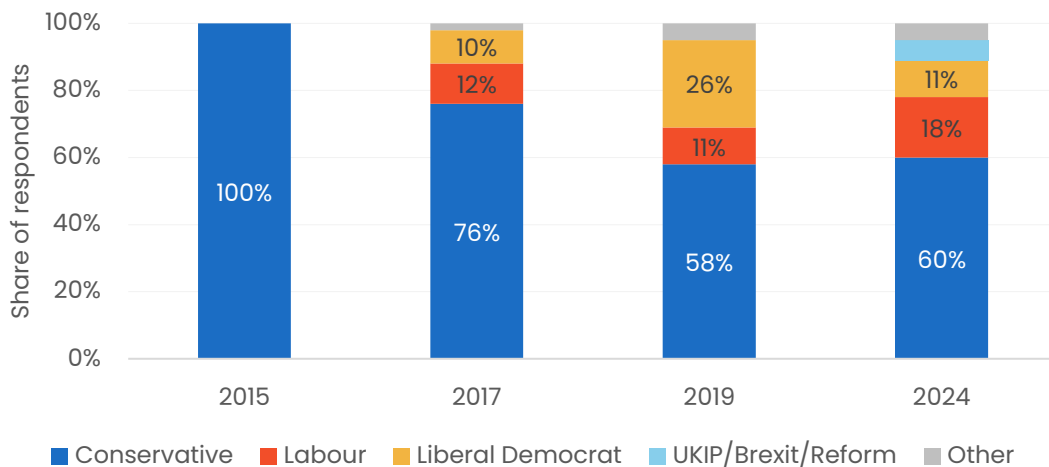
Nearly a quarter of those who voted Tory in 2015 and Remain in the EU referendum moved away from the party in 2017, with 12% going to Labour and 9% to the Liberal Democrats. A greater share went to the Liberal Democrats in 2019 (27%), possibly due to Jo Swinson’s pledge to reverse Brexit and the hostility of many Remain voters to Boris Johnson.

Perhaps unexpectedly, what was left of the “Conservative Remain” vote held up in 2024, with 60% of Conservative Remainers sticking with the party. Again this is further evidence that the effect of Brexit on the Tory voting coalition was already priced in. However, former Conservative Remainers were more split between Labour and the Liberal Democrats in 2024.

That this group stayed loyal between 2019 and 2024 suggests the Conservatives retain a base of support in the “blue Wwall”, preventing a complete collapse in South East strongholds. But the party did not make gains in these seats; its post-Brexit losses have already taken place and have not returned.

**Figure 22: Voting pattern of those who voted Conservative in 2015 and Remain in 2016**

Source: Focaldata megapoll, 20th May - 28th June, 2024

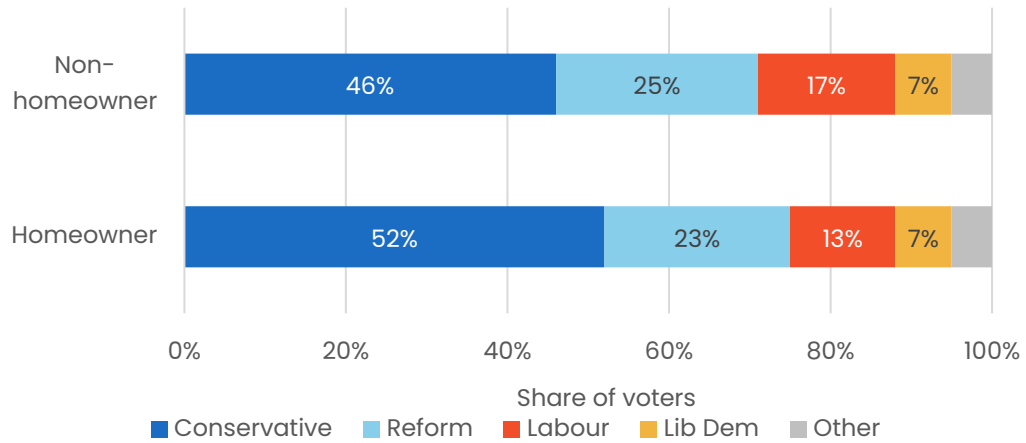


## Winning back homeowners would bring significant gains

Conservative retention was higher among homeowners, with 52% of 2019 Conservatives staying with the party, compared to 46% of non-homeowners. The efficient spread of homeowners across swing seats means that a ten-point swing among this group could generate an extra 127 seats for the Tories, compared to just 115 if homeowners were evenly distributed.

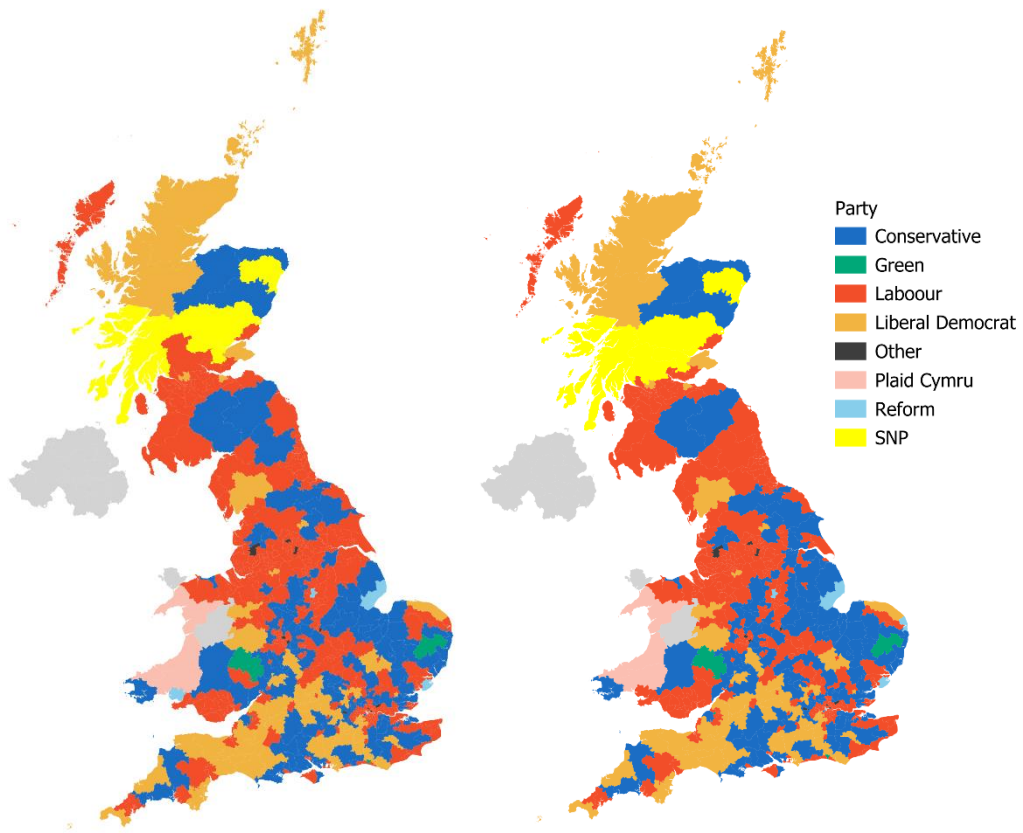
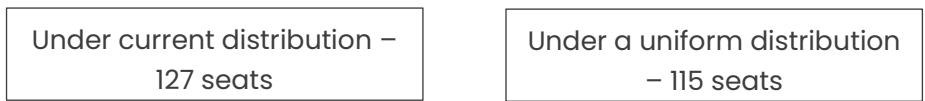
**Figure 23: 2019 Conservative voters' 2024 vote, by homeownership status**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 24: Potential seat changes with a 10-point swing among homeowners**

Source: Focaldata megapoll, , 20th May - 28th June, 2024



## Key seat changes

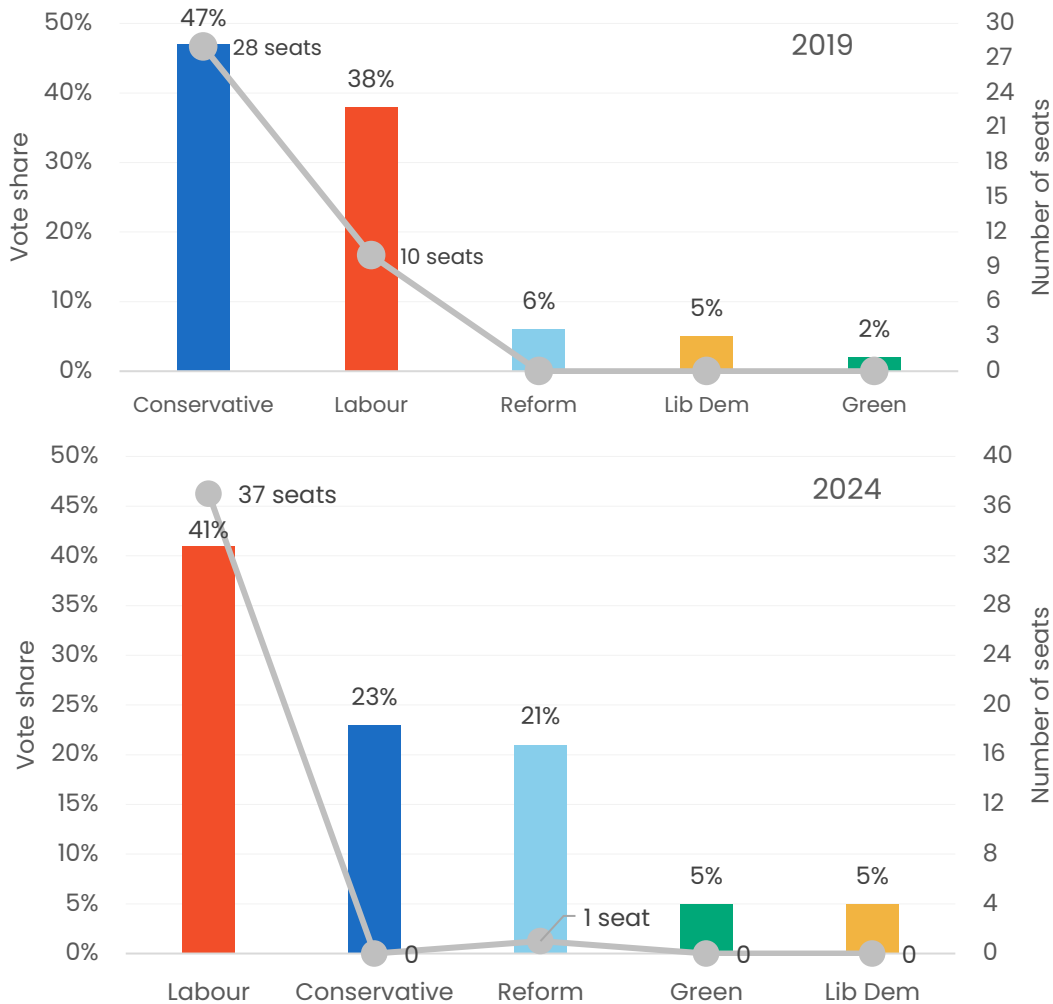
### Labour successfully rebuilt the red all

In 2019 the Conservatives won 28 out of 38 “red wall” seats on the strength of 47% of the vote on those seats. In 2024 Labour only increased its vote share in the red wall by three percentage points, but took every red wall seat back.

Reform won 23% of votes in the red wall and 28% of the 2019 Conservative red Wall vote; combined with the small vote share gain for Labour this was lethal for the on average smaller Conservative majorities in those seats. The coalition of Leave-backing voters in red wall seats who backed Johnson in 2019 fractured, handing the region back to Labour.

**Figure 25: Average vote share and winners in red wall seats, 2019 and 2024**

Source: House of Commons Library 2019 and 2024 general election results



## The Conservatives' "blue wall" fractured

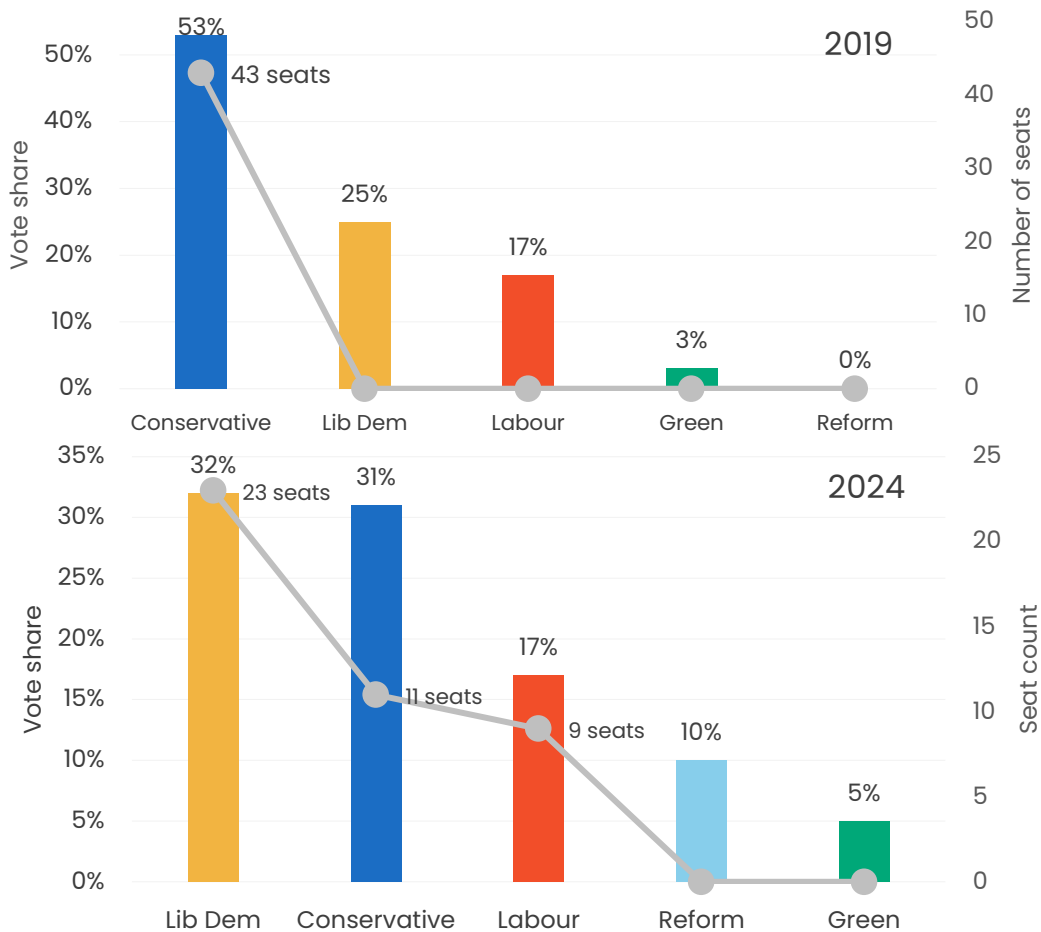
At the same time, the so-called "blue wall" saw losses, with Conservatives down from 43 seats in this region to just 11, with the party's vote share collapsing from 53% to 31%. The Liberal Democrats increased their vote share from 25% to 32% - enough to take 23 seats when previously they had none.

Vote retention was stronger in the blue wall at 57%, versus 50% in the red wall. It should be noted that while 14% of 2019 blue wall Conservative voters switched to the Liberal Democrats in 2024, a higher share - 17% - switched to Reform.

While Conservatives lost a larger number of voters to Reform across the country, these voters were more evenly spread, meaning a high Reform vote has usually meant a Labour win rather than a Reform win. In contrast, the Liberal Democrat vote in areas like the blue wall was efficient, converting into seat share.

**Figure 26: Average vote share and winners in blue wall seats, 2019 and 2024**

Source: House of Commons Library 2019 and 2024 general election results



## The Conservative vote collapsed in Labour-Conservative swing seats

Labour did extremely well in Labour-Conservative swing seats.<sup>4</sup> The Tories lost 66 of these seats compared to 2019 while Labour gained 63.

But this does not reflect a large increase in vote share; Labour was up just three percentage points on its 2019 performance. The Conservatives were down 24 points with Reform up 16 (with Liberal Democrat support unchanged). Again, a collapse in the Tory vote and a surge for Reform handed these seats to Labour, rather than a significant increase in Labour support.

In Labour-Conservative swing seats, Conservatives retained just 44% of their 2019 vote. They lost 20% of their vote to Labour and 27% to Reform. There was also evidence of tactical voting, with 36% of 2019 Liberal Democrats choosing to vote Labour.

**Table 2: Share of 2019 voters in Labour-Conservative swing seats, by 2024 destination**

Source: Focaldata megapoll, 20th May - 28th June, 2024

2019 vote share	Conservative	44%	20%	27%	3%	3%	1%	2%
	Labour	2%	85%	4%	2%	6%	1%	1%
	Brexit	7%	7%	74%	5%	4%	1%	3%
	Lib Dem	9%	36%	4%	43%	5%	2%	2%
	Green	2%	25%	10%	8%	51%	1%	3%
	Other	9%	29%	32%	3%	1%	23%	3%
	Not Vote	10%	38%	12%	4%	7%	3%	27%
		Conservative	Labour	Reform	Lib Dem	Green	Other	Not vote
		2024 vote share						

## The Conservative vote collapsed in Liberal Democrat-Conservative swing seats

In seats that voted Liberal Democrat in 2010 and Conservative in 2015, the Conservatives lost 22 seats. The Liberal Democrats gained 19 (up from three) and Labour gained three.

However, the Liberal Democrats increased their vote share by just five percentage points. Labour increased their vote by just two points. Once again, the story is of Conservative collapse - the Tory share of the vote fell from 51% to just 26% in Liberal Democrat-Conservative swing seats.

**Table 3: Share of 2019 voters in Lib Dem-Conservative swing seats, by 2024 destination**

Source: Focaldata megapoll, 20th May - 28th June, 2024

2019 vote share	Conservative	49%	9%	25%	2%	3%	1%	2%
	Labour	3%	68%	2%	22%	3%	1%	1%
	Brexit	4%	12%	76%	6%	0%	0%	2%
	Lib Dem	3%	12%	2%	78%	4%	1%	2%
	Green	4%	7%	11%	25%	51%	0%	2%
	Other	7%	24%	28%	17%	3%	17%	3%
	Not Vote	10%	25%	14%	16%	6%	1%	29%
		Conser vative	Labour	Reform	Lib Dem	Green	Other	Not vote
	2024 vote share							

## Conservatives lost every “new” Conservative seat

In 2019 the Conservative Party won 46 seats which voted Labour in 2015 and lost 43 back to Labour in 2024, plus one each to Plaid Cymru in Wales, Reform and an Independent. Once again, Labour only increased its vote by two percentage points, but the Tory vote nearly halved from 49% to 25%.

In new Conservative seats Reform took 21% of the vote, up from 5% won by the Brexit Party in 2019. There were very small gains for the Greens and Liberal Democrats.

In these seats, 27% of 2019 Tory voters defected to Reform and 20% to Labour. There was tactical voting again in these types of seats, with 34% of 2019 Liberal Democrats switching to Labour (see Table 4 below). In these seats, too, Conservatives have therefore suffered from the rise of Reform and a rise in tactical voting from “third place” party supporters.

**Table 4: Share of 2019 voters in “new” Conservative seats by 2024 destination**

Source: Focaldata megapoll, 20th May - 28th June, 2024

2019 vote share	Conservative	45%	20%	27%	2%	3%	1%	2%
	Labour	2%	63%	6%	2%	5%	1%	1%
	Brexit	10%	15%	68%	1%	2%	3%	1%
	Lib Dem	8%	34%	6%	45%	1%	2%	4%
	Green	4%	27%	11%	4%	50%	3%	1%
	Other	5%	31%	12%	1%	4%	40%	7%
	Not Vote	6%	38%	12%	4%	6%	3%	31%
		Conservative	Labour	Reform	Lib Dem	Green	Other	Not vote

## Conservatives experienced large losses in all regions

The party reduced its vote share across all UK regions. The biggest reductions were in the West Midlands (26 percentage points), East Midlands (26 points), East of England (26 points) and South West (26 points).

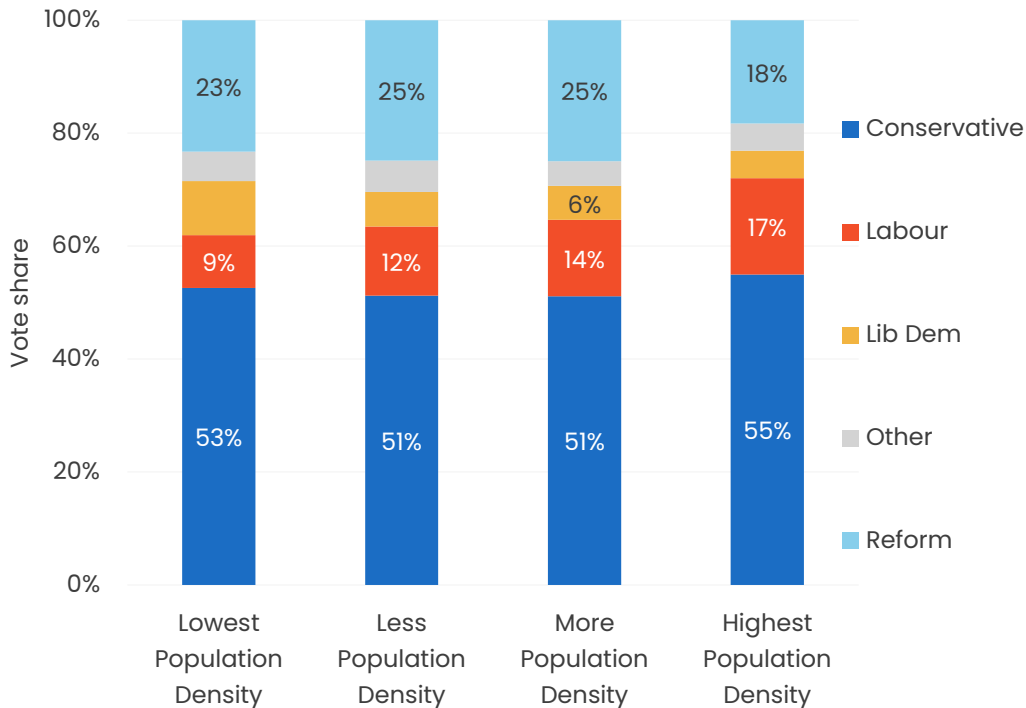
With almost no increase in the Labour vote share - and some reductions in it - the Tory vote split between the Liberal Democrats, Reform, Labour, nationalist parties and the Greens.

Among 2019 Conservative defectors, Reform did best in the North East, winning 30% of the 2019 Tory vote, the North West (27%) and Wales (29%) and weakest in Greater London (15%) and Scotland (14%). The Liberal Democrats performed best in the South East, winning 10% of Conservative defectors, and the South West (13%).

Overall Labour did better than the Conservatives in denser and more urban areas while the Conservatives did better in less dense and less urban areas. Given the general collapse of the Conservative vote, Conservative defection was high across the country. But it was higher in highly dense areas (55% defection rate) and lowest in medium density areas (51%).

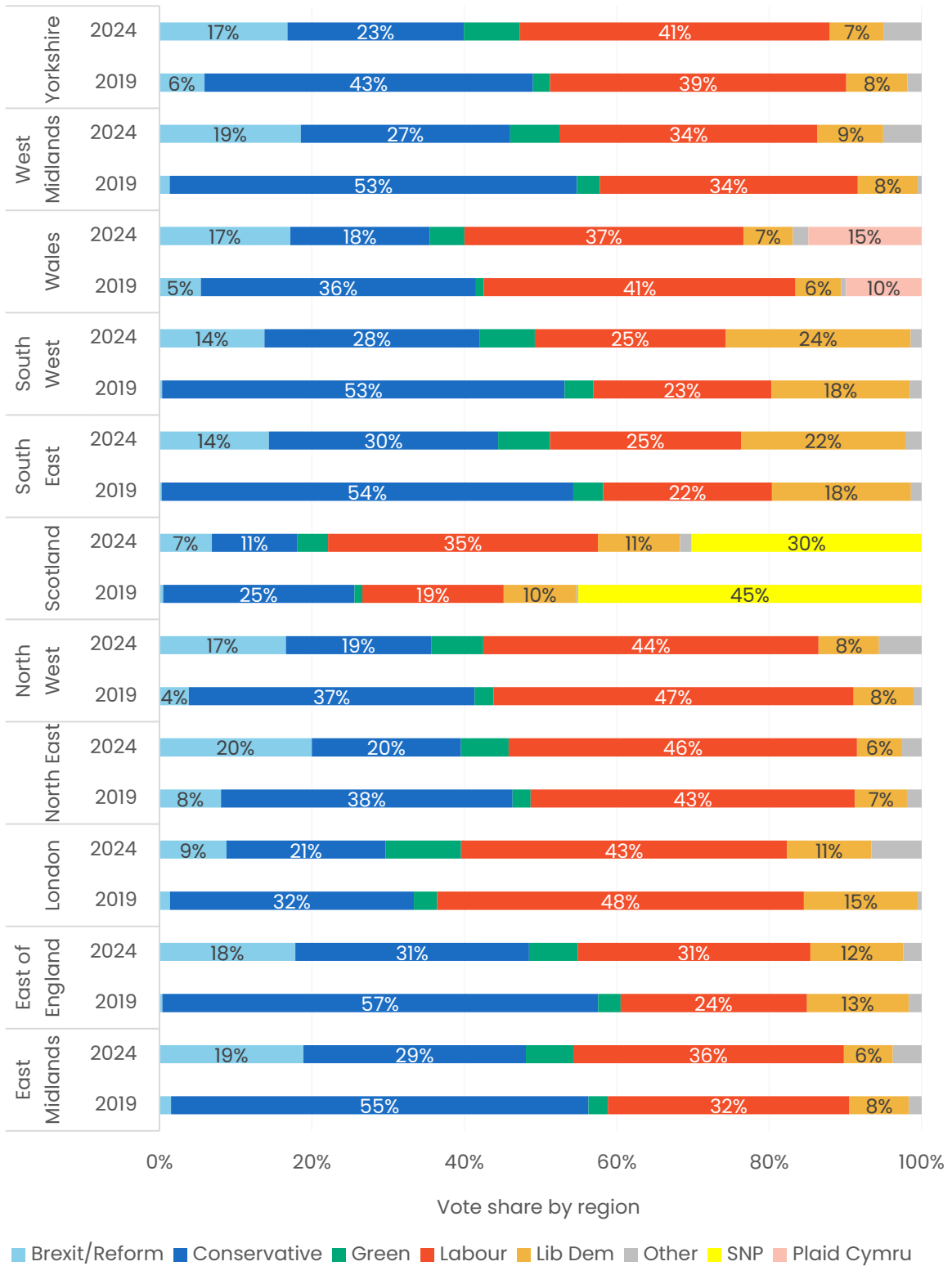
### Figure 27: Defection rate among 2019 Conservatives by seat population density

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 28: Vote share by region, 2019 and 2024**

Source: House of Common Library, 2024 general election results



# The campaign



The Conservatives suffered multiple factors aligning against them all at once during the short campaign, which began on May 22nd, 2024 when Rishi Sunak announced the snap election. The poor campaign for the Conservatives was a result of many reasons:

- Voters had negative hopes and expectations for the Conservative party when the election was called. Most voters wanted and expected them to lose.
- Voters viewed what the election was about through Labour's framing, especially the need to end the chaos and that it was time for change.
- Salient news stories were mostly negative for the Conservatives, including Rishi Sunak leaving D-Day celebrations early, Gamblegate and Nigel Farage's return as a Reform candidate.
- Nigel Farage had a positive impact on the Reform campaign.
- Labour and Liberal Democrat voters were much more willing to vote tactically to oust Conservative MPs.
- The Labour campaign was viewed more positively than the Conservative campaign by voters.
- The Conservative Party suffered from negative overall perceptions, including that it was untrustworthy, self-interested and that it represented the rich.

## **The campaign begins**

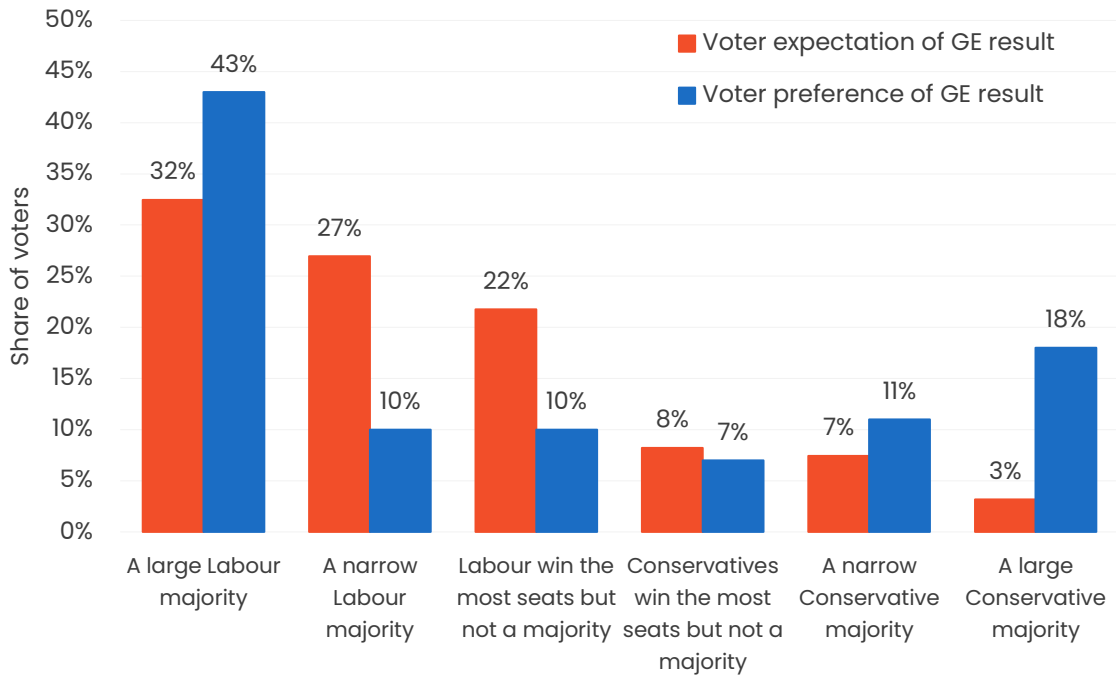
### **Voters thought the Tories would lose before the election was called**

At the time the election was announced, expectations for the Conservatives were already low, with most voters hoping they would lose. When asked in May 2024 what outcome they expected from the election, 59% of voters expected a Labour majority and 22% a Labour minority government. Just 10% thought there would be a Conservative majority and 8% a Tory minority government.

Half of the country thought Labour would win in their constituency. 43% said they wanted a large Labour majority and 10% wanted a smaller majority. Just 29% wanted the Conservatives to win. Notably, the proportion saying they wanted a large Labour majority was around ten percentage points higher than the ultimate Labour vote share.

### Figure 29: Voter preference and expectations of 2024 general election result

Source: Onward-Focal kickoff poll, 25th-30th May, 2024



#### Voters viewed the election through Labour’s framing

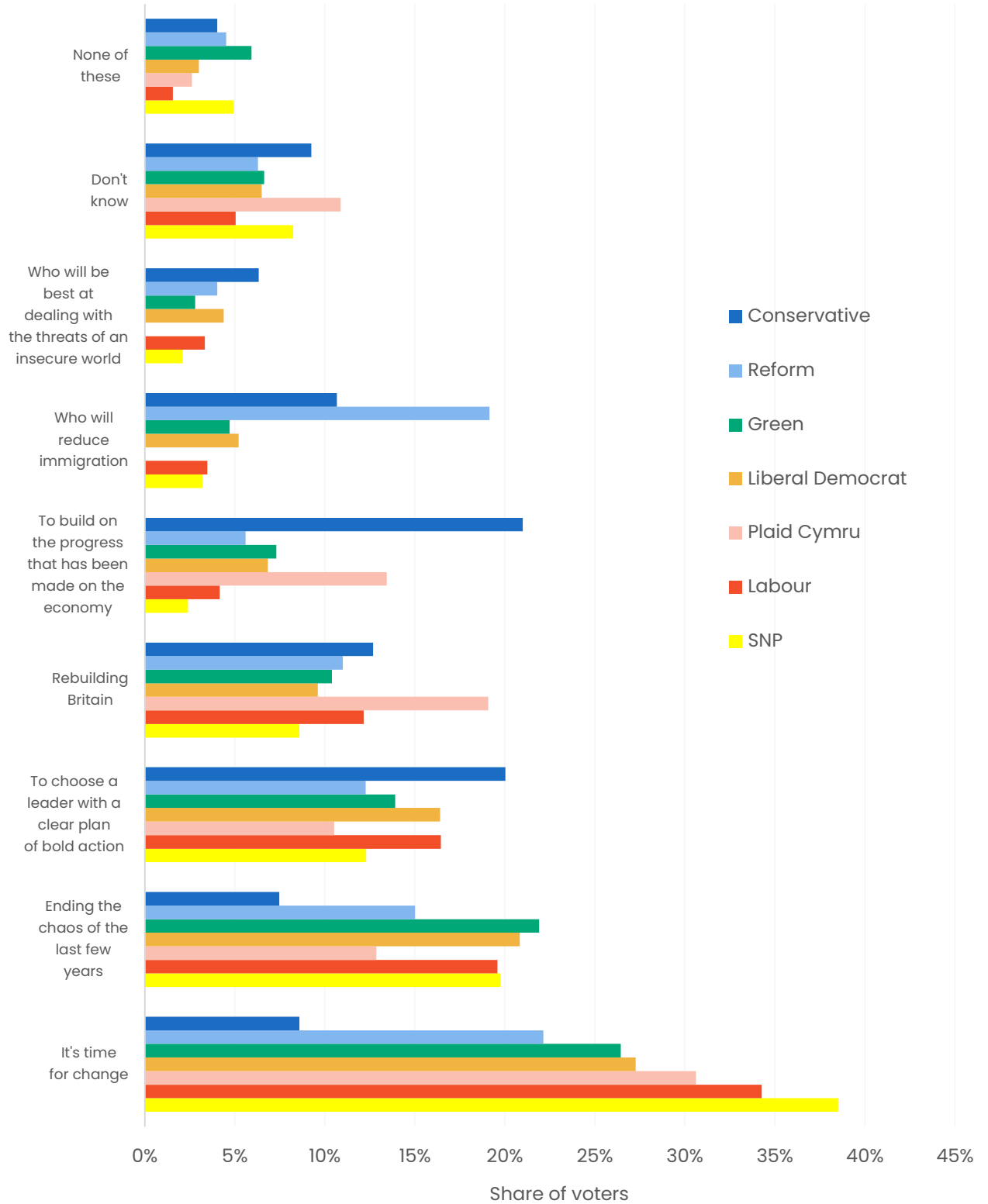
When asked what the 2024 election was about, the most popular responses reflected Labour’s narrative and campaign framing around it being “time for a change” and “ending the chaos of recent years.”

Rishi Sunak’s core message of a “clear plan and bold action” was only the third most popular choice, while “dealing with threats in an insecure world” was the least.

However, “clear plan and bold action” was chosen by 16% of those intending to vote Labour and Liberal Democrat each at the time the poll was conducted, suggesting they believed Keir Starmer and Ed Davey had these qualities.

**Figure 30: Voters' view on what the election was about**

Source: Onward-Focal kickoff poll, 25th-30th May, 2024



Participants from focus groups conducted with JL Partners shared similar beliefs on what the 2024 general election was about. Victoria, an undergraduate student from South Cambridgeshire said ‘Time to pass on to another party now, let them have a go.’ Nick, a support worker from Bodmin, Cornwall, was keen to see the end to the “chaotic Conservative leadership,” and thought they were “grasping at straws.”

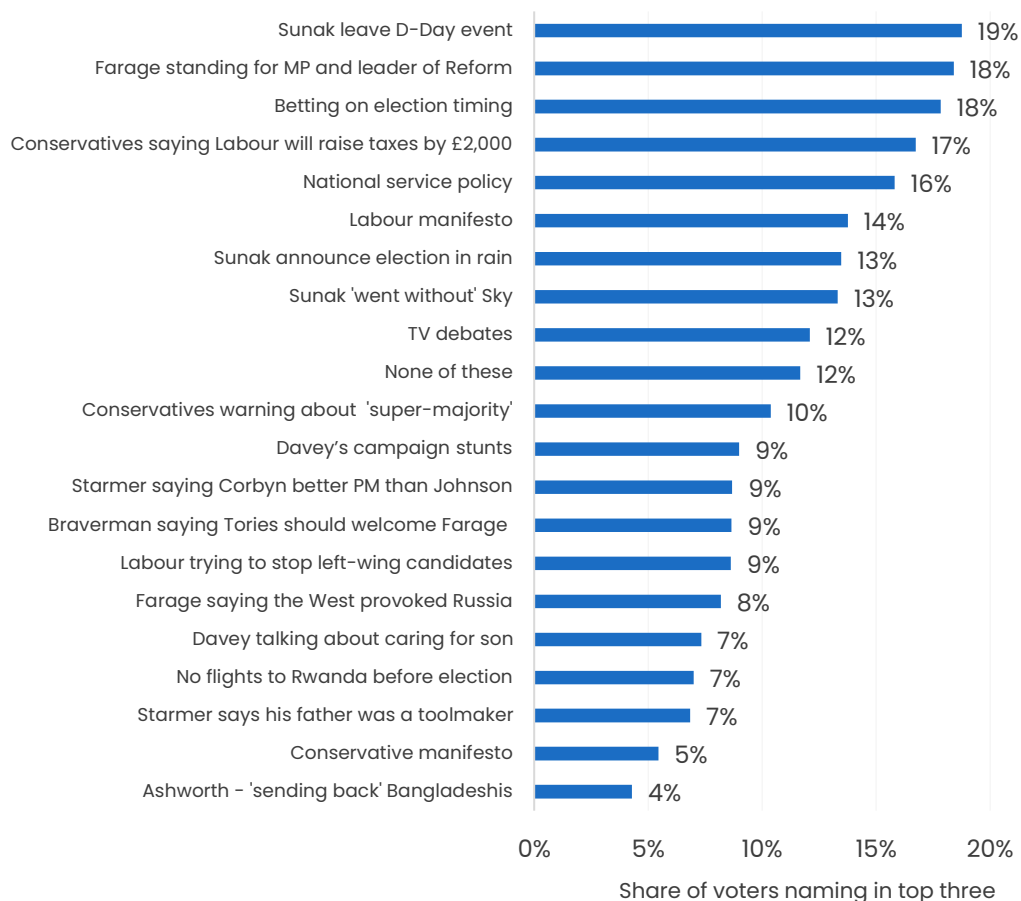
## Key campaign events

### Most salient campaign news stories were not favourable to the Conservatives

In a poll of all 2024 voters, Sunak leaving D-Day was the story the largest percentage of respondents said had a big impression on them (19%), followed by Nigel Farage announcing he would stand as an MP (18%). Conservative Party figures being caught betting on the date of the election had the third most impact (18%).

**Figure 31: Campaign events that made the biggest impression on voters (when asked to select their top three)**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



## Voters had negative emotional reactions to key campaign events

Some 62% of voters said they felt “disappointed” by Sunak leaving D-Day, with 52% stating they were “angry” and 50% “embarrassed”. In response to the betting ‘Gamblegate’ scandal, 56% were angry and 52% disappointed.

In contrast, 40% of voters who noticed Farage’s announcement that he would be standing to be an MP said it made them feel “hopeful”, 36% “optimistic” and 27% “enthusiastic”.

Responding to Conservative campaign messages, 27% were “sceptical” of the national service policy, though 24% were hopeful and 22% optimistic. The £2,000 tax rise warning had some impact, with 31% saying it made them angry and 27% “afraid”.

Focus group participants were deeply put off by some key events that transpired during the short campaign. D-Day, Gamblegate and the Sky News comments made by Rishi Sunak all garnered feelings of anger.

### Box 1: Focus group quotes about key campaign events

On D-Day, Mike, a voluntary worker from Hartlepool commented: *“That’s when I realised their time was up, I’m afraid to say. I think he knew that as well.”* And Julie, a healthcare worker from Hartlepool thought it was *“disrespectful behaviour.”*

On Gamblegate, Jill, a part-time admin worker from Cannock Chase *“It just shows how corrupt they all are. They want to be part of the elite, the money people. They’re not interested in us peasants.”* And Gillian, a retired nurse from Cannock Chase said, *“how stupid of them to do it.”*

On the Sky News debacle, Ravina, an advisor from Cannock Chase said, *“It was a bit of a weird moment ... comparing hard times to not having Sky when you’re younger. It’s a strange moment. Basically he (Rishi Sunak) is saying he’s in poverty because he hasn’t had Sky. It’s a bit of an awkward and weird thing to say.”*

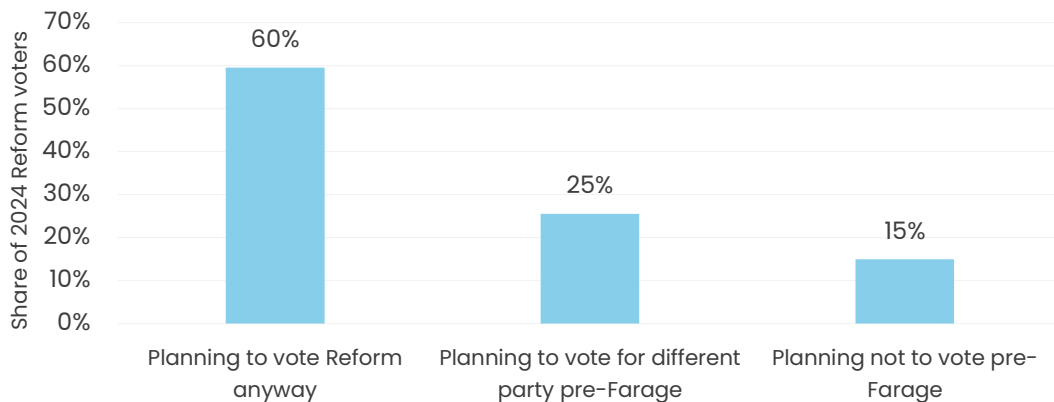
## Nigel Farage’s return encouraged people to vote Reform

Farage’s return to stand for Reform UK gave the party a major boost. While 60% of Reform voters said they would have voted for the party regardless, a quarter said they were planning to vote for another party before Farage announced he was standing and 15% said they were previously planning on not voting at all.

Crucially for the Conservatives, over half (55%) of Reform voters said they were planning to vote Conservative before Farage became Reform UK’s leader. Just 20% said they were going to vote Labour.

**Figure 32: Impact of Farage’s return on 2024 Reform voters**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



If Farage had not announced that he would be standing for Parliament, Reform would not have won a single seat. Modelling the results of the election, if Reform voters had behaved like our respondents said they would have done before Farage announced he would stand for Parliament, our analysis shows that without Farage’s return Reform would not have won a seat. Conservatives would have won an extra 19 seats, but Labour would still have won a landslide.

**Table 5: Seats won if Farage had not returned as a Reform leader**

Source: House of Commons Library, 2024 general election results<sup>5</sup>

Party	Number of seats
Labour	399
Conservative	140
Liberal Democrats	70
SNP	9
Other	6
Green	4
Plaid	4

Focus group participants had mixed views on Farage. Those from Reform-leaning seats like Rother Valley and Cannock Chase spoke very favourably of him. Peter, now retired, from Rother Valley commented: *“Labour and Conservatives in all these debates on television, they’re talking to each other. Whereas Nigel Farage, he’s talking to the people, he’s relating to the people. They’re just trying to score points off each other.”*

But others were more sceptical about him and whether he would deliver on his promises. Sarah, a manager from Bodmin, thought Farage was a racist and said, *“he is the best mate of Donald Trump - that says a lot.”* Jill, a Labour voter from Cannock Chase commented, *“I think Nigel Farage is a bit of a dangerous fellow ... Some of the things he says, and then he backtracks.”* Kay, an early years teacher from Bodmin thought *“Farage was good on I’m a Celebrity Get Me Out of Here, but I wouldn’t trust the man, I just don’t trust him.”*

### **Willingness to vote tactically**

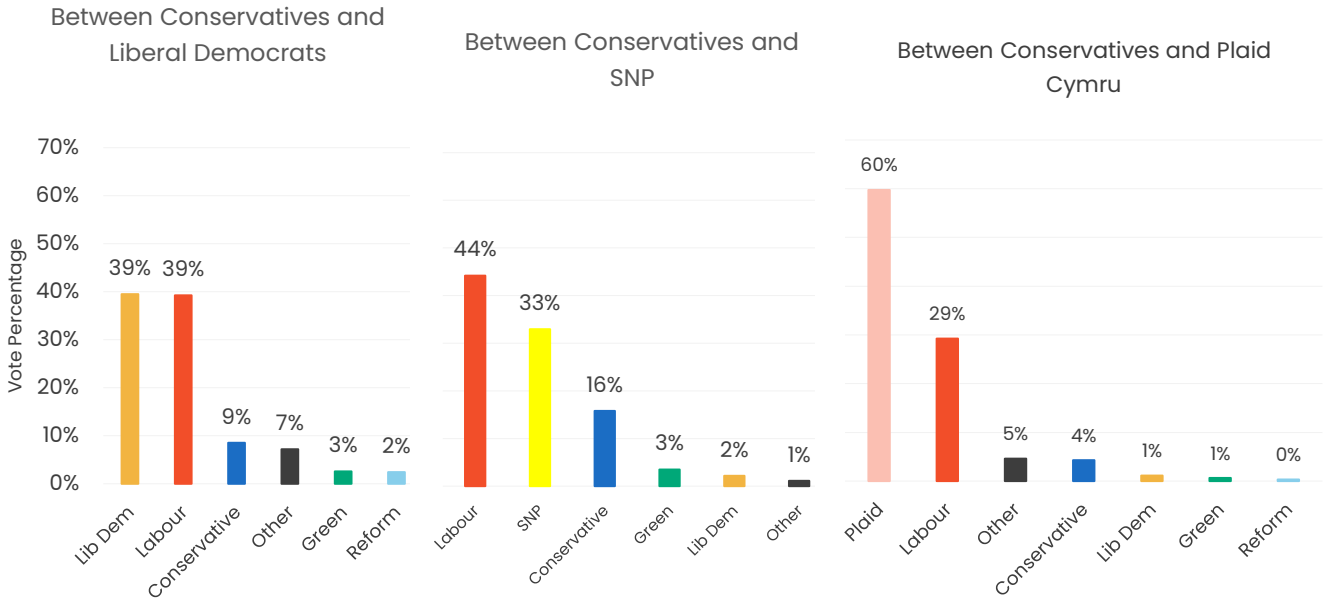
Labour and Liberal Democrat voters were much more likely to vote tactically. Before the election, voters were given hypothetical scenarios to test their willingness to vote tactically: *“Previously, you said you were most likely to vote X if there was a UK General Election tomorrow. Now imagine a situation where you live in a constituency where only Y or the Conservatives were likely to win. In this situation, who would you vote for?”*

Results showed a high degree of willingness to vote tactically against the Conservatives by those intending to vote either Labour or Liberal Democrat in England. 39% of Labour voters said they would vote for the Liberal Democrats in a Conservative-Liberal Democrat swing seat and 30% of Liberal Democrat voters said they would vote Labour in a Conservative-Labour swing seat. The only seats in which significant numbers of voters were willing to vote tactically *for* Conservatives were in Scotland - as a tactical vote against the SNP.

With both 2019 Labour and Liberal Democrat voters, Conservatives suffered from tactical switching to “get the Tories out”. In Conservative seats with a higher Liberal Democrat vote share, a third of 2019 Labour voters were willing to switch to the Liberal Democrats in 2024 (see Figure 35 below). Similarly, 27% of 2019 Liberal Democrat voters were willing to vote Labour in Conservative seats where the Labour vote share was higher than 30%.

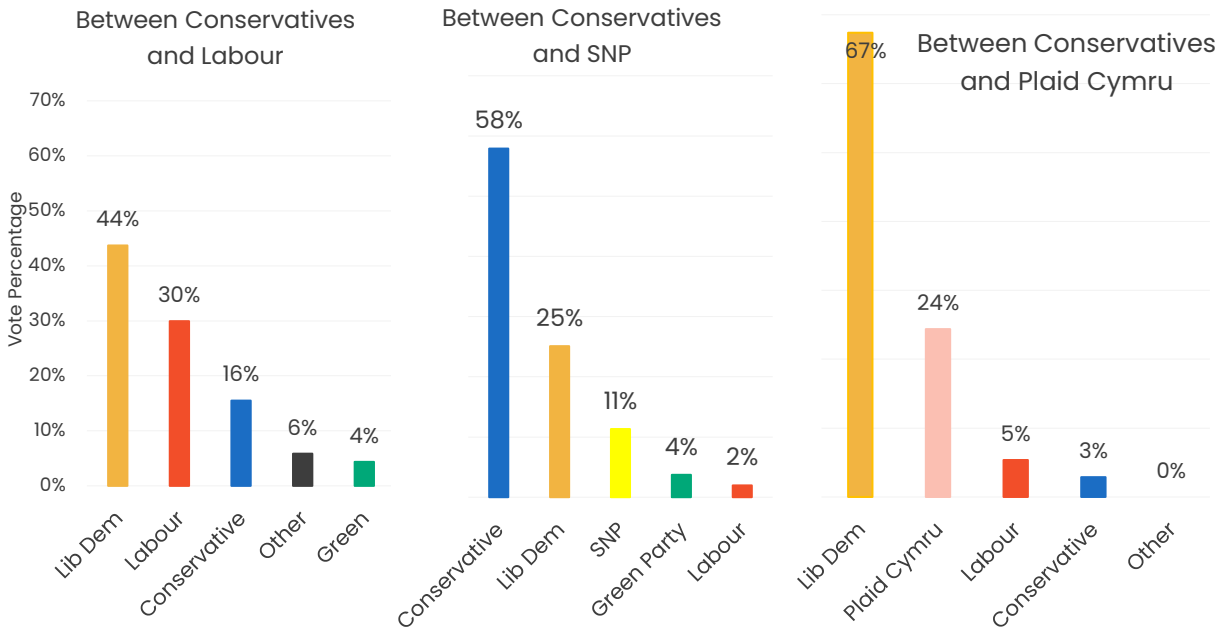
**Figure 33: Vote intention among 2024 Labour voters in seats when voters were told only two parties can win**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



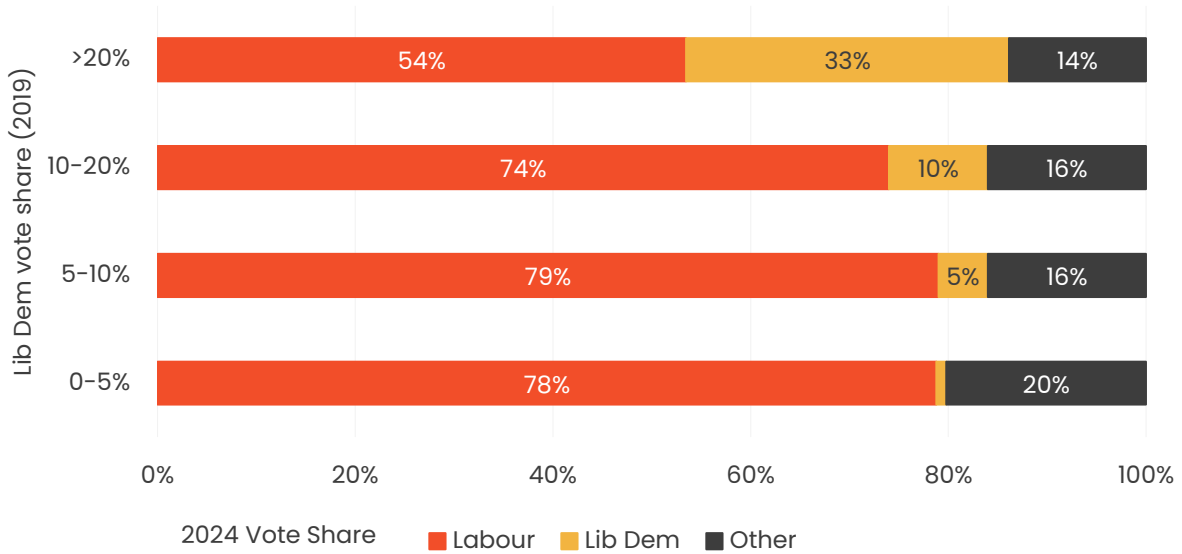
**Figure 34: Vote intention among 2024 Liberal Democrat voters in seats when voters were told only two parties can win**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



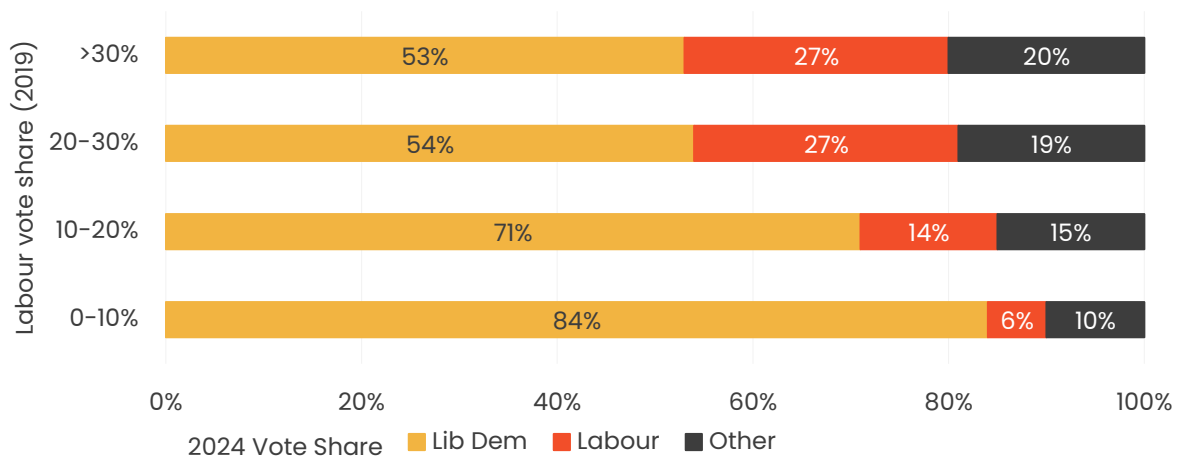
**Figure 35: 2024 vote among 2019 Liberal Democrat voters in Conservative seats**

Source: Focaldata megapoll, 20th May - 28th June, 2024



**Figure 36: 2024 vote among 2019 Labour voters in Conservative seats**

Source: Focaldata megapoll, 20th May - 28th June, 2024

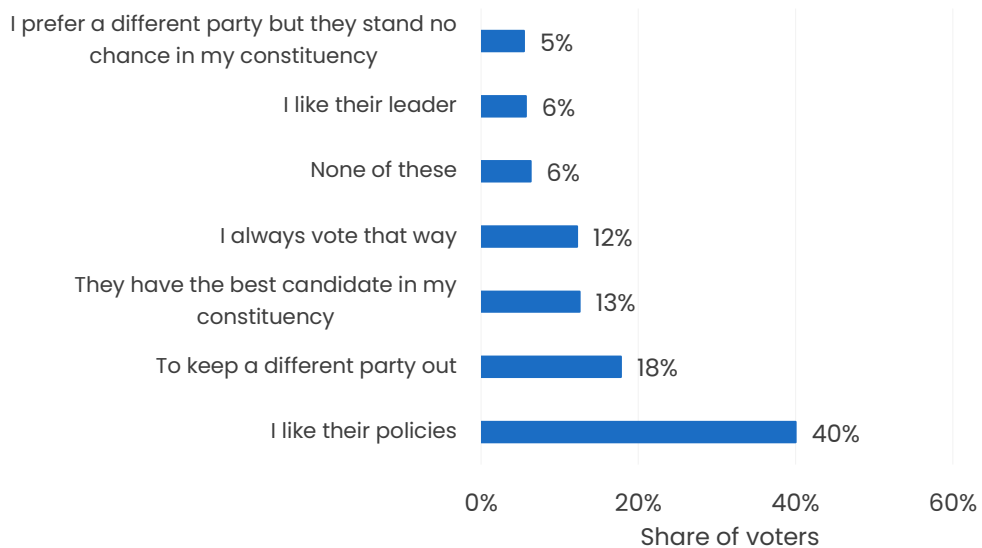


**The Conservatives suffered from anti-incumbency**

Among those that did not vote Conservative in 2024, keeping a different party out was the second most widely given motivation for voting for a particular party (18%), after liking its policies (40%). And of those who said keeping a party out was their priority, nearly two-thirds (63%) said this party was the Conservatives (see Figure 34 below).

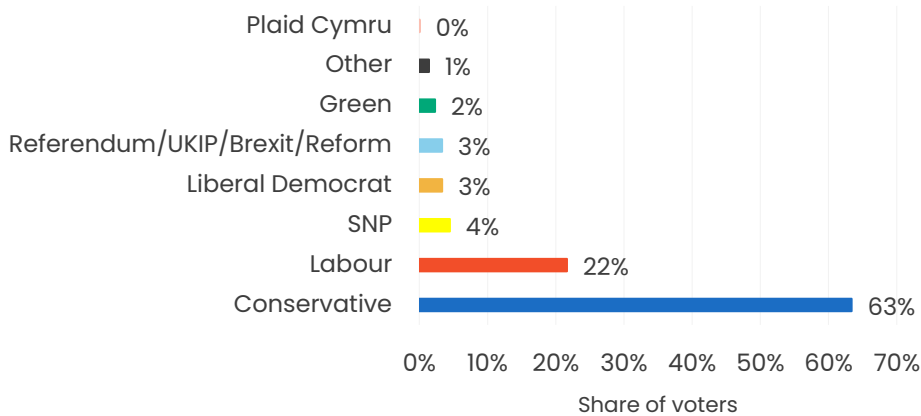
### Figure 37: Reason for choosing a party among 2024 non-Conservative voters

Source: Onward-Focal foundational poll, 10th-28th May, 2024



### Figure 38: Party desired to be kept out among 2024 non-Conservatives

Source: Onward-Focal foundational poll, 10th-28th May, 2024



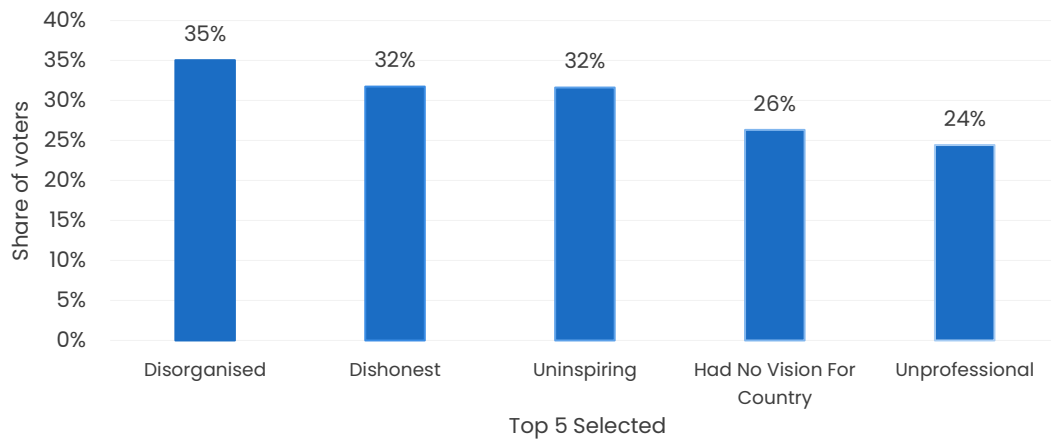
## Overall voter views of the campaign

### Voters viewed the Conservative campaign more negatively than Labour's

The Labour campaign did not achieve a significant positive reaction from voters, but the Conservative campaign was viewed more negatively. When asked about the Conservative campaign, 35% found it “disorganised,” 32% “dishonest” and 32% “uninspiring”. No positive responses featured in the top five reactions.

**Figure 39: All voters: Which of these words would you use to describe the following parties' election campaign? Tick all that apply**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



Sentiments about the Conservative campaign were overwhelmingly negative in the focus groups. Alec, an IT assistant manager from Hartlepool thought the campaign was “a culmination of six months of the Tory party working really hard to make sure they don’t win.” Stuart, a consultant from Tunbridge Wells, thought it was like a “car crash, almost like he’s purposely trying to lose this election.” And Justin, a self-employed business consultant from South Cambridgeshire said “They’re floundering, big style. They’re not believable. They’ve given up, and the policies they’re spouting out are just fanciful.”

**Voter had mixed views of Labour but largely negative views of the Conservatives**

In general, perceptions of the Labour Party were overwhelmingly positive. Voters described the party as “dishonest” and “untrustworthy”, but also “professional”, “hopeful”, “organised” and “optimistic”. In contrast, the Tories were viewed as “dishonest”, “untrustworthy”, “lost” and “corrupt”.

Majority of the focus group participants had few positive things to say about the Conservative Party, and fewer knew what it represented. “Profit for the rich,” “high earners”, “elitist” and “upper class” were frequently used to describe the Conservatives. Mark, an engineer from Bodmin said “The Conservative Party used to represent the interests of broken Britain, but now they’ve broken it some more.”

Some participants were unsure what the Party stood for. Luke, an account manager also from Stevenage remarked, “I think they try to stand for traditional British values, like if you work hard you’ll do well. But to be honest I don’t know if that’s the case.” Annie, a design assistant at a fashion brand from Stevenage, “Every time I think they





# The record



## Anti-incumbency

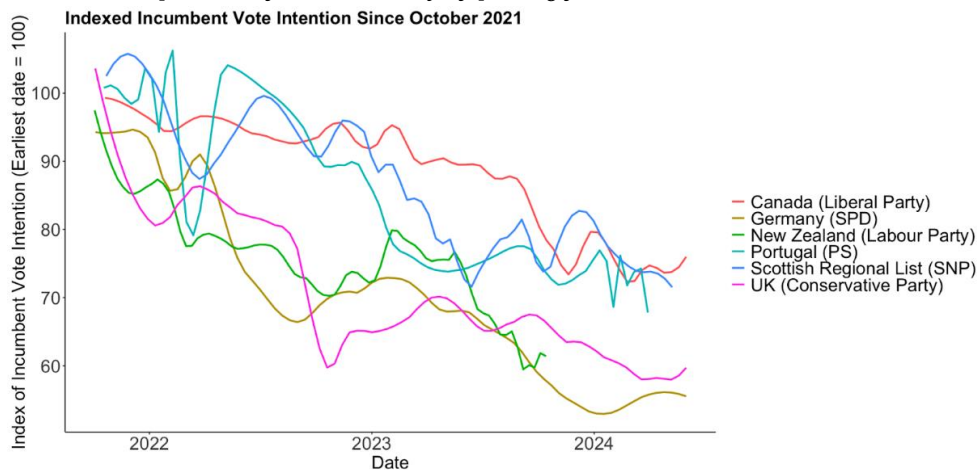
The Conservatives suffered as a result of anti-incumbency arising from the events of the last 2019–2024 Parliament. These medium-term causes preceded the short campaign and were to a degree priced in. But a 20% poll deficit was never likely to be recovered. So how did the party end up in a position where it could almost certainly not win before the election was even called?

### Conservatives suffered from anti-incumbency and unique domestic factors

Levels of dissatisfaction with the incumbent government had reached a near historic low. Net satisfaction in April 2024 was -74 – similar to Black Wednesday in 1992, the worst disunity of the John Major government and the depths of the pre-Brexit constitutional crisis. But almost all Covid-era governments have suffered from anti-incumbency effects and “Covid exhaustion”, with loss of Conservative support closely reflecting the trends for the German SPD and New Zealand Labor Party (until they were voted out).

#### Figure 39: Index of selected incumbent party vote intention, 2021 – 2024

Source: Scraped data from a variety of polling firms<sup>6</sup>



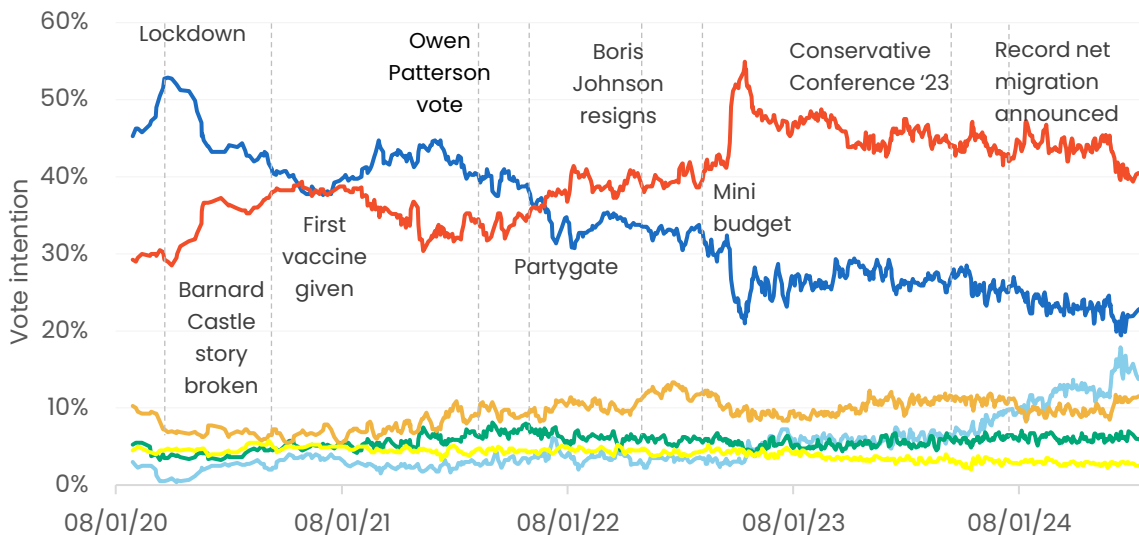
The 2019–2024 government suffered from factors unique to the UK too. The party received an uplift in the polls at the time of the first Covid lockdown in March 2020 and after the announcement of the first vaccine in 2021. The revelations around Dominic Cummings’s visit to Barnard Castle, reported in May 2020, resulted in the Conservatives losing their poll lead in the second half of 2020, but it recovered with the 2021 vaccine rollout. This bounce in support was reflected in the 2021 local election results, in which the Conservatives gained 235 councillors and Labour lost 327, and the Hartlepool by-election, in which the Conservatives gained an historically Labour seat.

Focus group participants also credited the Conservatives for protecting livelihoods through furlough. Chelsea, a salon manager from Hartlepool said, “I genuinely think that that (Covid-19) is something that we’ve never come across. I think they’ve done really good job with furlough – they kept businesses open.”

However, the Partygate revelations of November 2021 did major damage to the government’s reputation, with Labour taking a poll lead over the Conservatives at the end of that year. Following the resignation of Boris Johnson as prime minister in June 2022, the Labour lead over the Conservatives was around 7 points, widening significantly to more than 20 points following Liz Truss’s mini-budget. After these events, the Conservative poll deficit only ever narrowed slightly, proving irrecoverable by the time the election was called.

**Figure 40: UK vote intention, 2020–24**

Source: Analysis of scraped data<sup>7</sup>



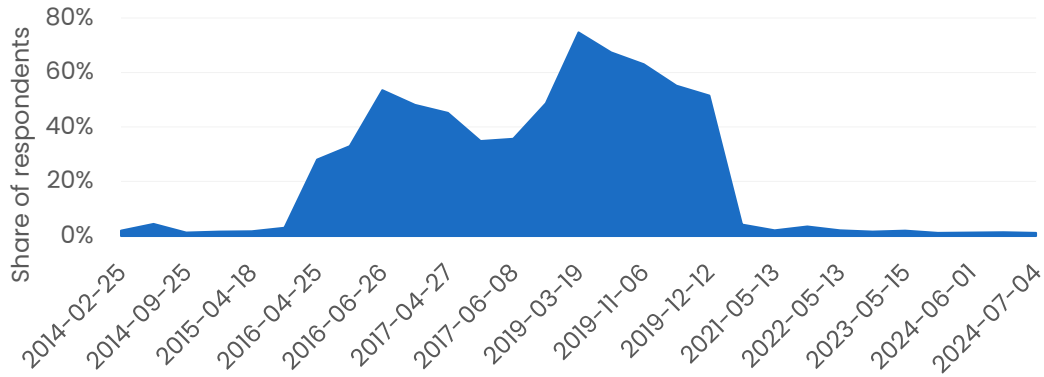
## The Conservatives’ 2019 advantages disappeared

### Europe ceased to be a priority for voters after Brexit

With Brexit, the party was in some ways a victim of its own success. 74% had said Europe was the most important issue facing the country in March 2019’s British Election Study wave before Brexit was resolved. This dropped to just 1% in the July 2024 wave. The Conservative lead over Labour was over 40% on Europe at the 2019 general election and it was also the most salient issue. Its removal as a contested ground removed a major area of Conservative advantage.

**Figure 41: Voters saying Europe is the most important issue (%), 2014 - 2024**

Source: British Election Study Internet Panel (BESIP) 2014-24

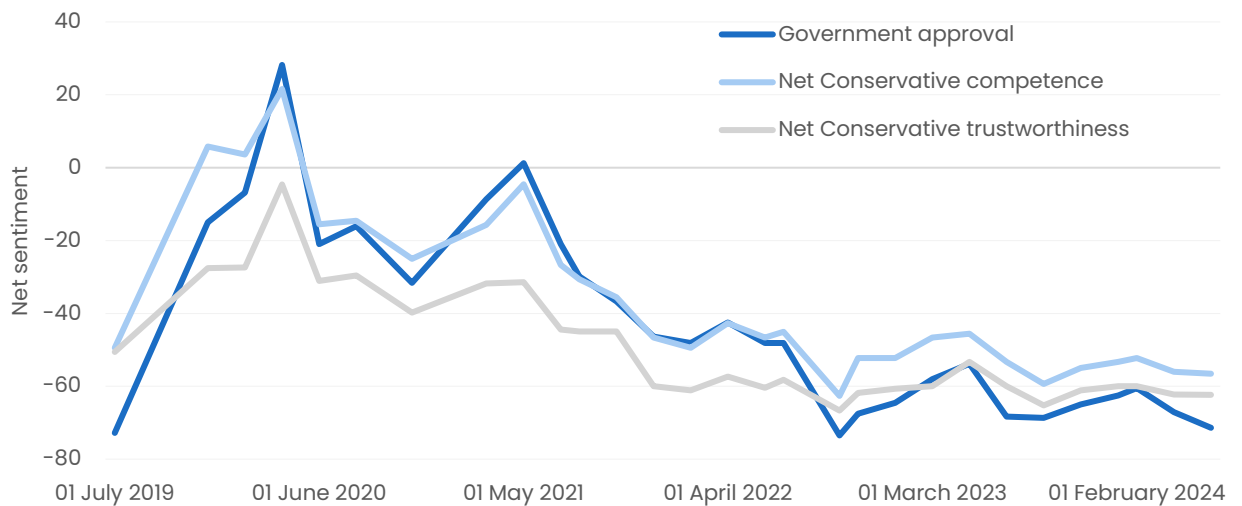


**Support for the Government over Covid and vaccines evaporated over “Partygate”**

Net sentiment towards the Government declined in line with perceptions of the Conservatives’ competence and trustworthiness after initial Covid and vaccine successes (see Figure 40 below). While supporters of all parties gave the Conservatives credit for the vaccine rollout, the parties in Downing Street made supporters of all parties “very angry”, and there was a lot of anger over “Partygate” among 2019 Conservatives who would go on to vote Labour or Liberal Democrat in 2024.

**Figure 42: Net sentiment for the Conservative Government, 2019 - 2024**

Source: YouGov tracker on Government Approval,<sup>8</sup> Conservative Party competence,<sup>9</sup> and trustworthiness<sup>10</sup>

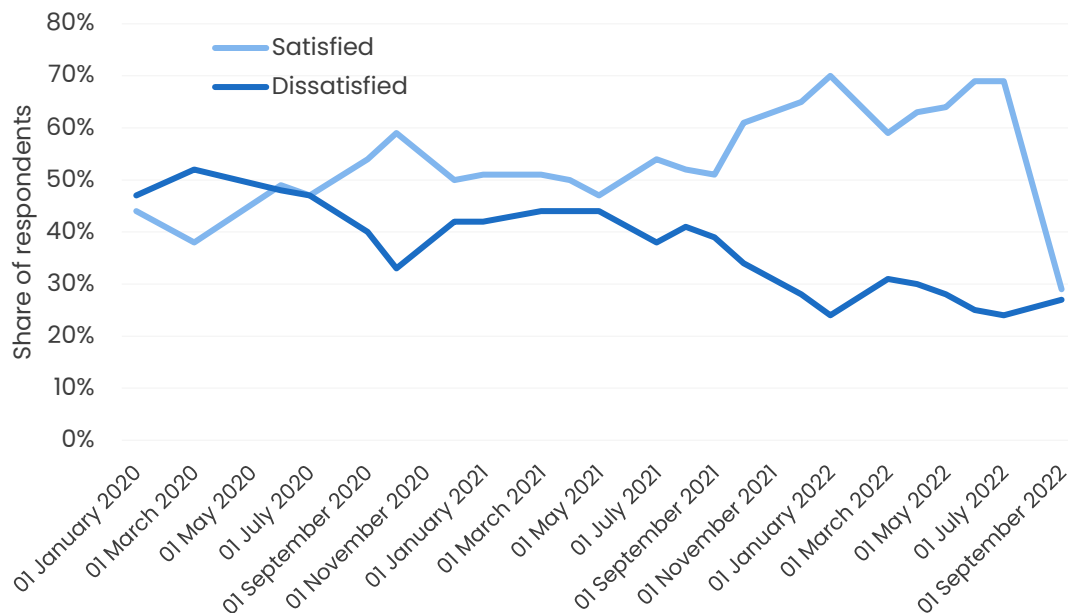


## Dissatisfaction with Boris Johnson harmed the party

The former Prime Minister enjoyed 52% satisfaction in March 2020 at the start of the pandemic, but fell to just 24% in July 2022, with 69% saying they were dissatisfied with him as Prime Minister. Some defectors cited the chaos and personal character of Johnson as their reason for abandoning the Conservative Party.

**Figure 43: Satisfaction and dissatisfaction with Boris Johnson as Prime Minister, 2020 – 2022**

Source: Ipsos Political Monitor Satisfaction ratings, 1997–present<sup>11</sup>



Focus group participants had divided views of Boris. 2019 defectors that felt let down by Partygate disliked Boris. Justin, a self-employed business consultant from South Cambridgeshire said, “My faith in the Tories was lost when they put Boris Johnson in charge. I think he’s a clown.” And Stuart, a consultant from Tunbridge Wells thought that “as Mayor of London he was a tourist attraction, but as leader of a country he was an embarrassment.”

But Conservative loyalists saw greater merit in Boris Johnson, particularly in his handling of the Government’s response to the pandemic. Barbara, now retired and living in Rother Valley gave Boris the benefit of the doubt. She remarked, “I think to be fair to him, there’s not many Prime Ministers who had to cope with something like that [Covid] ... He did have something absolutely massive to face up to. And yes, the country came out of it a lot poorer, but I don’t think we can blame Boris Johnson, not for everything.” Gillian, a retired nurse from Cannock Chase commented, “I really liked Boris Johnson ... people voted because Boris Johnson was in and everybody loved him ... If he was to stand again I’d definitely vote Conservative.”

## Incompetence and lack of delivery

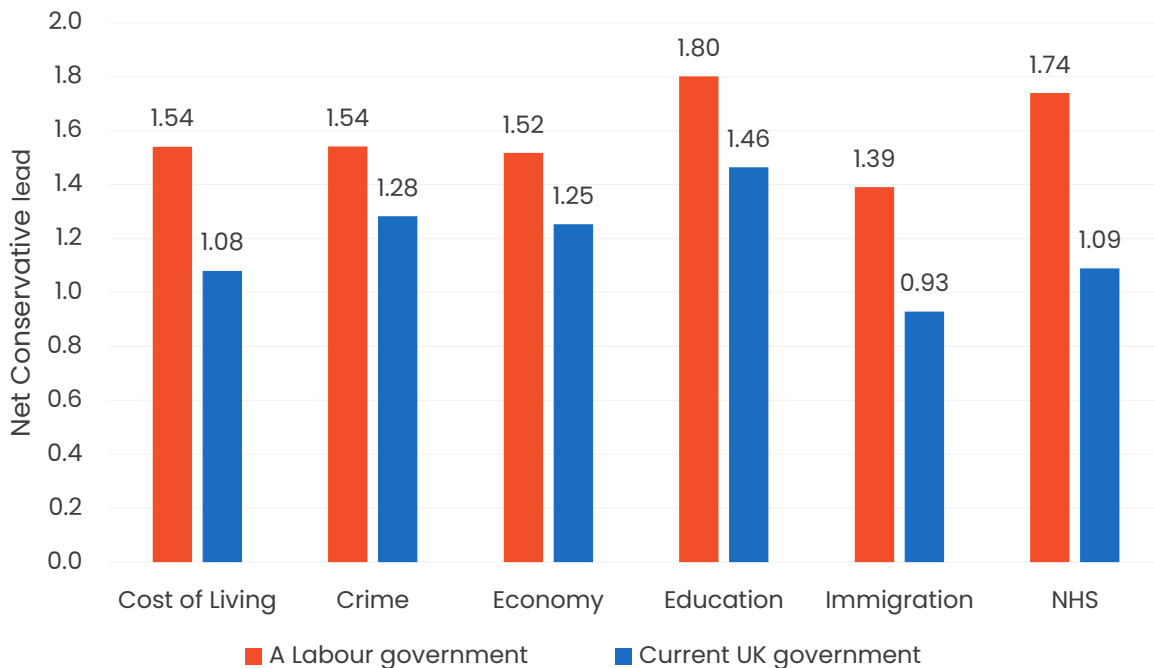
In Onward's foundational poll, conducted in May 2024, Labour led over the Conservatives when asked who would be best at handling all major policy issues, particularly ahead for handling the NHS.

This poll also asked respondents what they thought the most important issue facing the country were and which party would be best at handling them. Among all voters, Labour had a large lead over the Conservatives for the top two most salient issues (the NHS and inflation/cost of living). The Conservatives retained a small net lead on the economy, crime and immigration and asylum.

Among 2019 Conservative defectors, the Conservatives only had clear leads on less salient issues such as foreign affairs or terrorism. In contrast, Labour and the Conservatives were selected at similar rates as the best party for immigration and inflation, whilst Labour had a large lead for the NHS (see Figure 42 below).

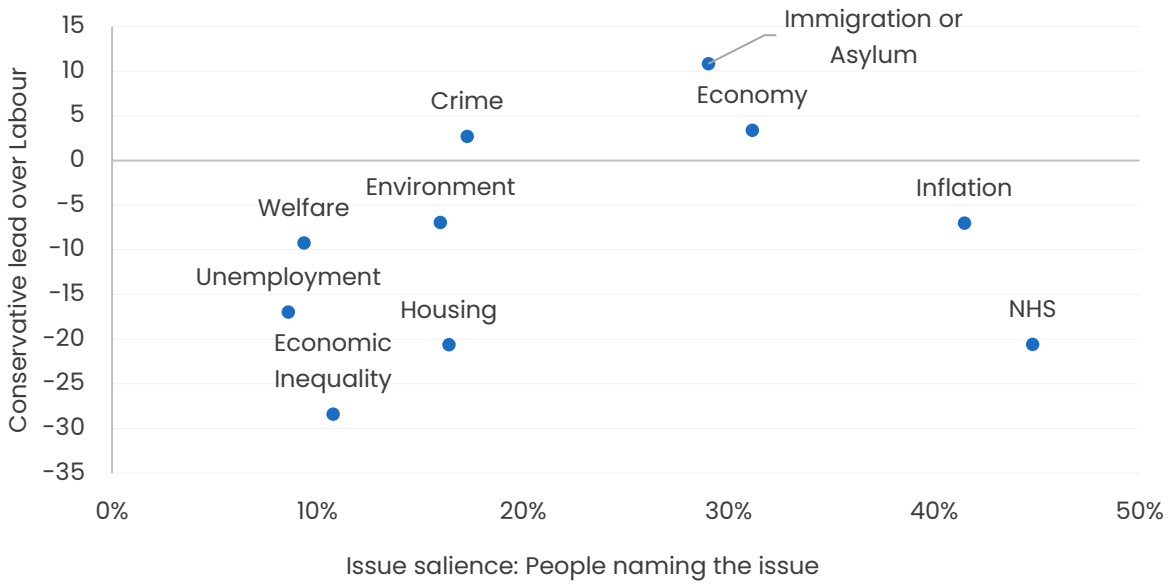
### Figure 44: Voter perceptions of how well a Labour or Conservative government could handle key issues

Source: Onward-Focal foundational poll, 10th-28th May, 2024



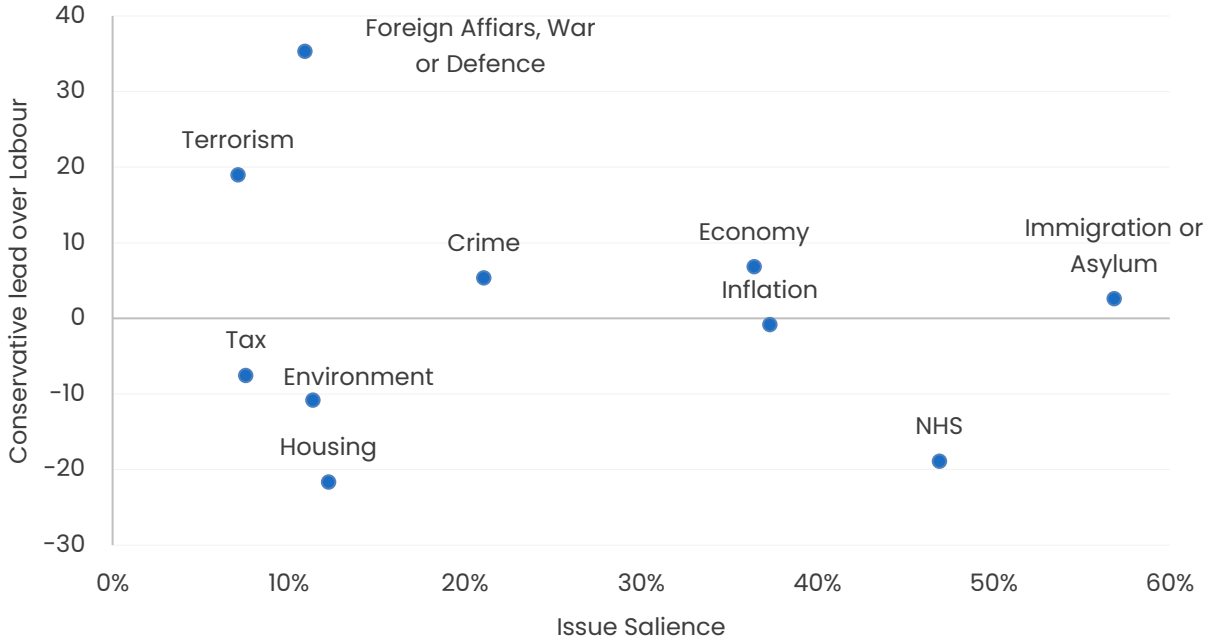
**Figure 45: Voter perceptions of how well a Labour or Conservative government could handle key issues**

Source: Onward-Focal foundational poll, 10th-28th May, 2024



**Figure 46: Conservative lead over Labour on selected policy areas among 2019 Conservative defectors**

Source: Onward -Focal foundational poll, 10th-28th May, 2024



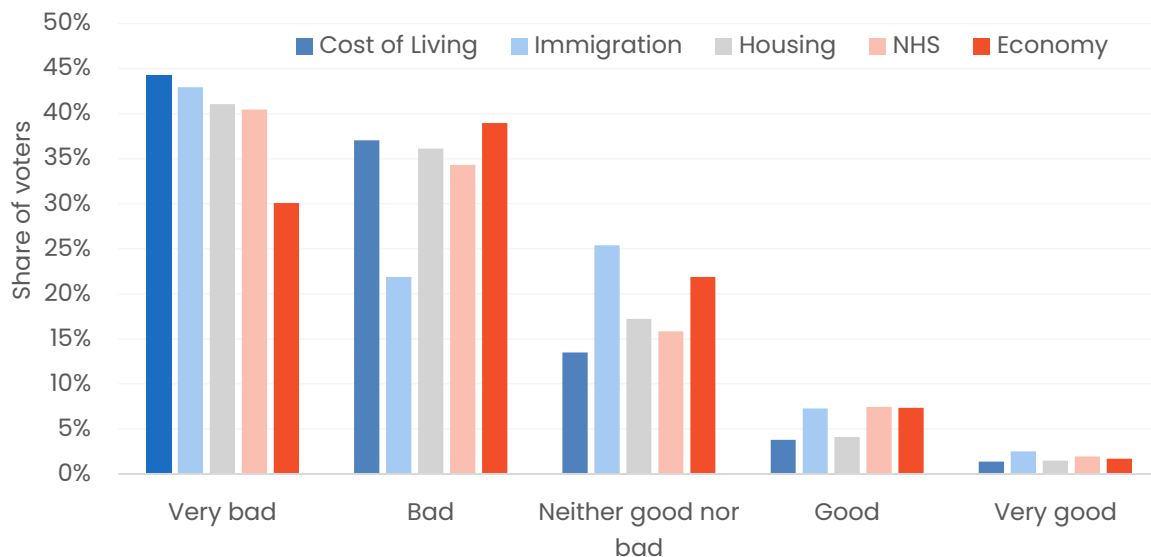
Even on the economy, an area where voters have traditionally trusted the Conservatives more, they now trust Labour. Diane, an administrator from South Cambridgeshire said, “I think I would like to give Labour a chance in a way because it just feels like we’ve got more and more tight squeezing going on since they [Conservatives] have been power ... I would always put my vote of confidence in the economy toward Conservatives and social issues potentially toward Labour. But I don’t feel very confident about the economy and how things are going. It certainly has affected us at a very bread and butter level.”

### Voters blamed the Government for “bad” or “very bad” performance in key areas

When asked to rate Government performance on the cost of living, the economy, housing, immigration and the NHS in the UK as a whole, voters chose “very bad” or “bad” by very large margins. And those rating these areas negatively tended to attribute this to the actions of the previous Conservative government rather than to factors outside of its control. The NHS was a particular problem, with 36% of those rating it bad or very bad attributing this “entirely” to the last Conservative government.

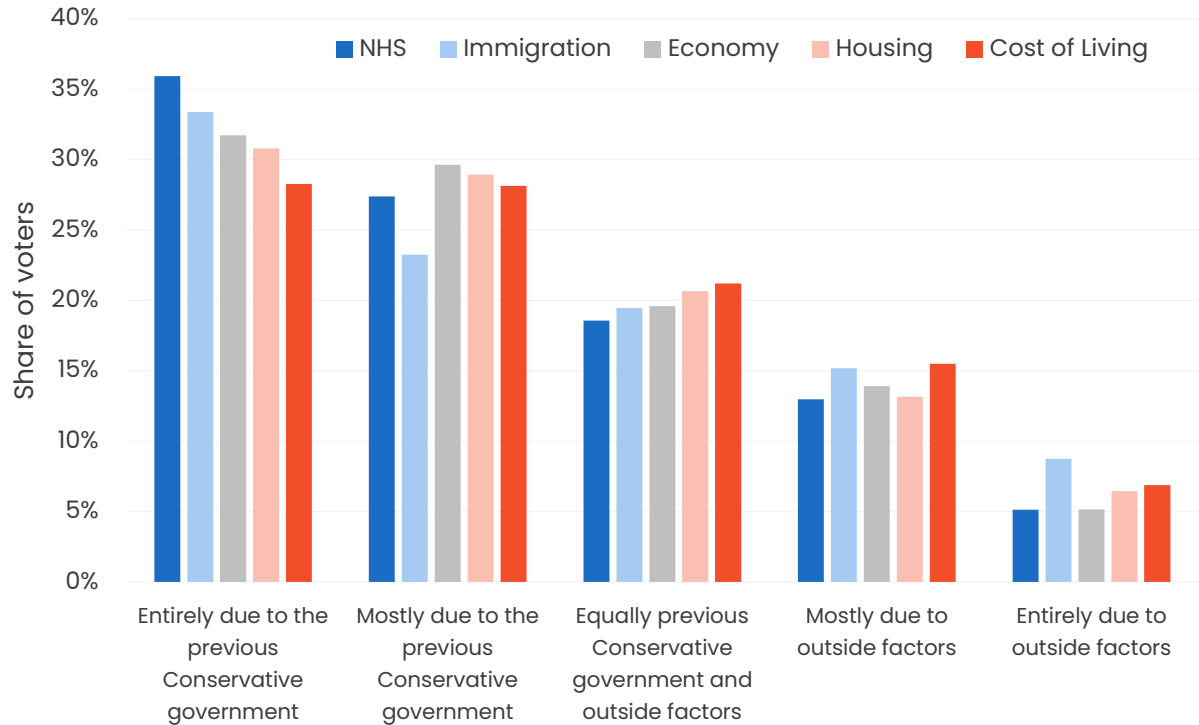
**Figure 47: Voter perceptions of government performance on key issues**

Source: Onward-Focal post-election poll, August 2nd-14th, 2024



**Figure 48: To what extent do you think the performance on each is due to the actions of the Conservative government or due to outside factors beyond their control? (All voters saying “bad” or “very bad” for an area)**

Source: Onward-Focal post-election poll, August 2nd-14th, 2024



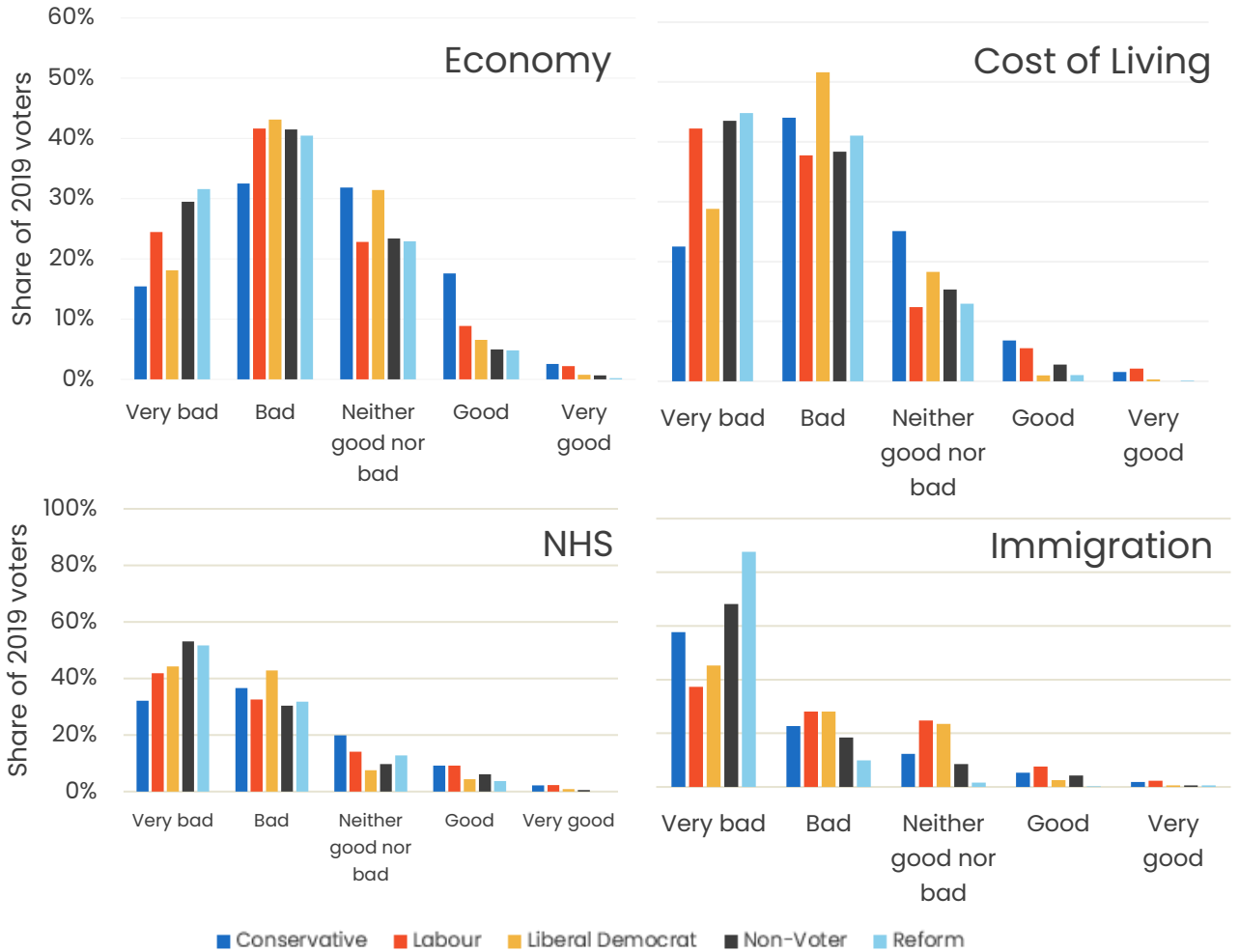
### 2019 Conservative voters rated key policy areas negatively and blamed the Government

Most 2019 Conservative voters came to view most major policy areas as being handled badly, and blamed the government. In the case of immigration government handling was seen particularly poorly by those who defected to Reform, with 88% saying it was “very bad”. 68% of non-voters and even 58% of those who stayed Conservative also held this perception.

Of the 2019 Conservatives who said given issues were “very bad” or “bad”, Labour defectors blamed the Government for the state of the NHS, with 41% blaming it “entirely” and 32% “mostly” on the Conservatives. Reform defectors blamed it “entirely” (38%) or “mostly” (21%) for poor handling of immigration.

**Figure 49: Views of 2019 Conservatives on key policy issues, by their 2024 vote**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



**Conservatives were seen to have broken their promises on immigration and the NHS**

During the general election, Boris Johnson signed a campaign pledge card guaranteeing extra funding for the NHS, 50,000 more nurses, 50 million more GP appointments, 20,000 more police, an Australian-style points-based immigration system, and no new tax rises.

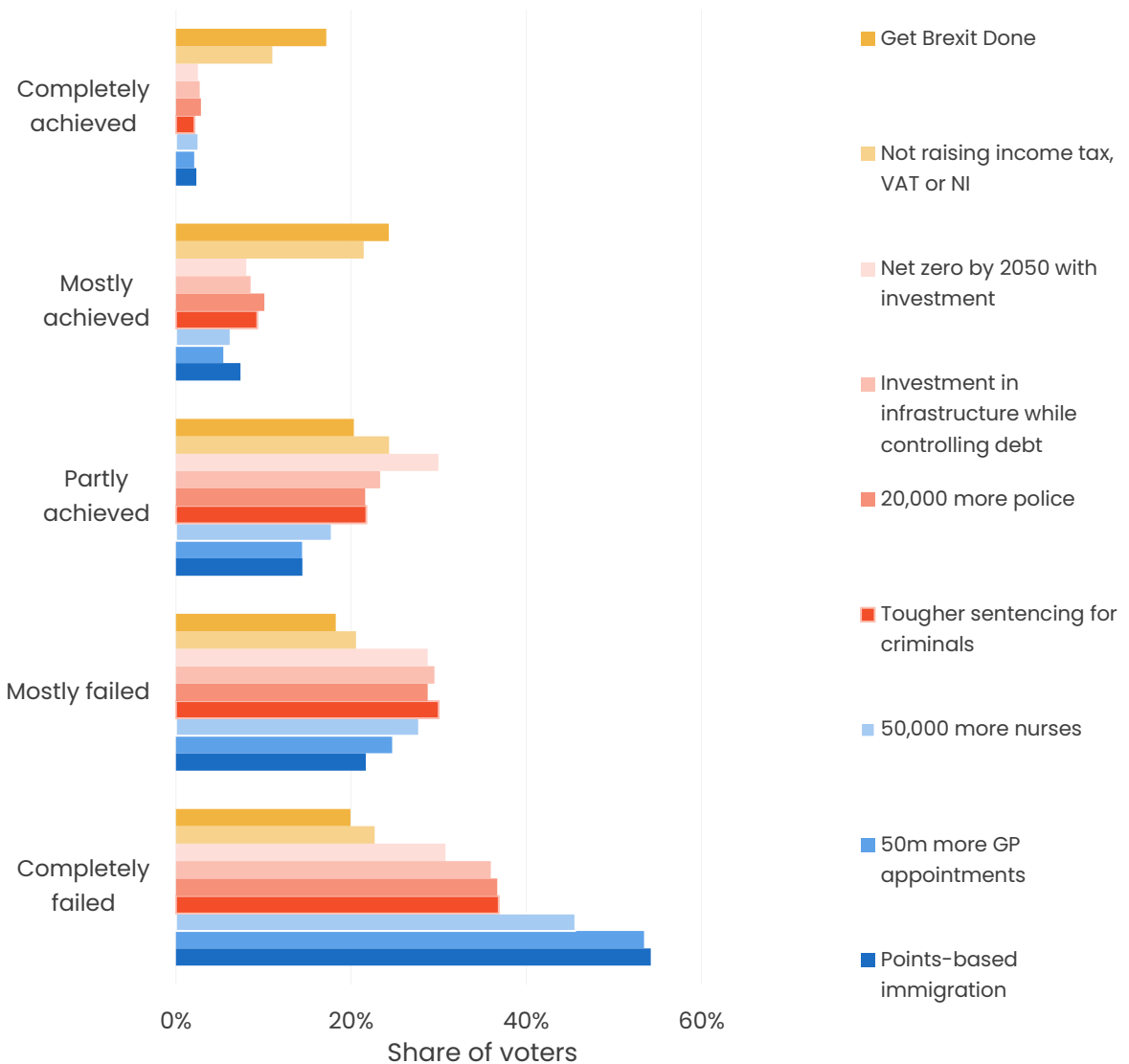
When asked whether they thought the Government had delivered on those pledges, most voters said they had failed. Only getting Brexit done was felt to be partially achieved. Over half (54%) said the Conservatives had “completely failed” to introduce

the immigration system promised, while 53% said the same about GP appointments and 46% about nurse recruitment.

John, now retired and living in Cannock Chase reflected on Boris' promises. He said, "Boris Johnson lied to the British people. About Brexit, about Covid. He lied to the North. He said he was going to do immigration, sort all that out. Why did everybody vote Conservative? Because they said they were going to sort immigration out, and they've done nothing." And Kay, an early years teacher from Bodmin complained, "We were lied to during the Brexit campaign where more money was promised to the NHS. The Conservative government just lied."

**Figure 50: Voter perception of Conservative accomplishment of promises by 2024**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



## Box 2: Focus groups on the 2019 Conservative pledges

Across most of the 2019 Conservative pledges, focus group participants felt that the Conservatives had not delivered on what they had promised. Although, getting Brexit done was positively acknowledged by some of the participants.

*On more police officers: Matt, a logistics manager from Tunbridge Wells said, “The police have had cutbacks, and then they put people back into the police and try to fund it again. They’ve been in power 14 years and they can’t say it is not their fault.”*

*On nurses: Kerrie from Stevenage said “The 50,000 more nurses that they promised, then there was the big scandal that the nurses were not new nurses, and that was all a big lie.”*

*On more GP appointments: Paul, an IT consultant from South Cambridgeshire commented, “The Conservatives have done very little for public services based on the amount of strikes. Why are so many people leaving the NHS? They did not invest in more doctors and staff in these public sector areas and that is why are we losing so many to start with.”*

*On reaching net zero by 2050: Gary, a McDonalds worker from Hartlepool felt that “the goal posts change to suit their needs rather than benefit the country.”*

*Millions invested while controlling debt:*

*Rob, retired, from Tunbridge Wells offered some advice to the Conservatives and said “They have to bite the bullet and say they’re going to have to invest some money. Stop trying to drop taxes when we know the money isn’t there to cut taxes.”*

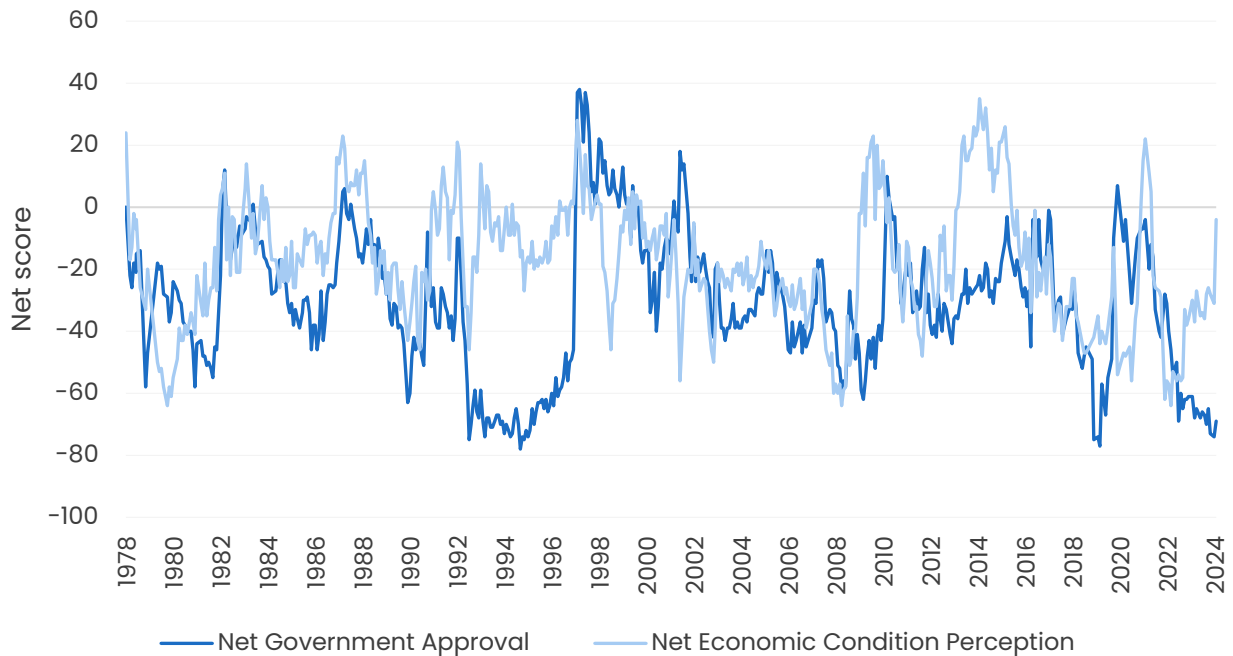
## The 2022 ‘mini budget’ damaged perceptions of economic competence

Perceptions of economic conditions and net approval of the government usually move in lockstep. Economic crises like Black Wednesday and Liz Truss’s mini-budget were watershed moments, causing many voters to turn irreconcilably against the party.

Comparing net approval ratings for governments with voters’ net perception of the economic outlook, it can be seen that damage to government approval tends to stick even once economic optimism is restored. After Black Wednesday, the 2008 crisis and the 2022 mini-budget, both economic perceptions and government approval were very low (-56 and -60, respectively, in the case of the latter). Economic perceptions did improve afterwards, but net government approval did not - the damage was done.

**Figure 51: Net economic condition perception and net Government approval, 1979 – 2024**

Source: Ipsos Political Monitor Satisfaction Ratings from 1977-present day, Economic Optimism Index, 1977- present.



### Approval for Liz Truss was extremely low among supporters of all parties

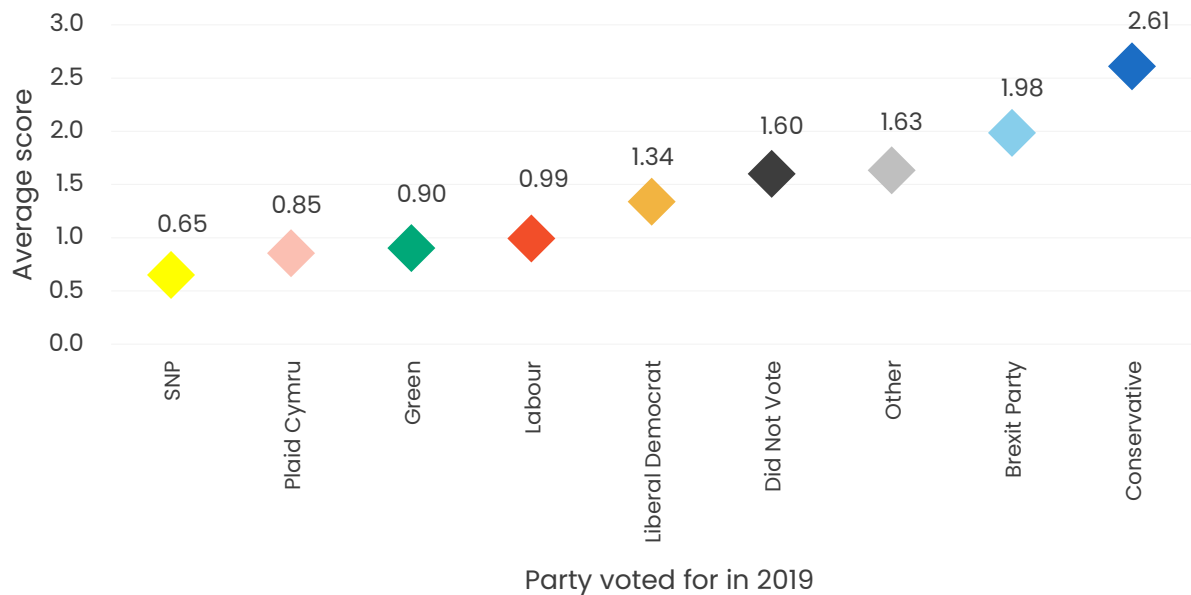
In addition to the damage caused by the mini-budget, Liz Truss was also hugely personally unpopular across all voter groups. On a scale of 0-10 – where 0 is strongly dislike and 10 strongly like – Conservative supporters only gave her 2.6 in December 2022, with every other voter group even worse.

She fared little better among 2019 Conservative voters, with those intending to vote Conservative again giving her only a three. She was particularly unpopular with 2019 Conservative voters who intended to defect to Labour or the Liberal Democrats (2.1 and 1.4, respectively).

**Figure 52: Liz Truss favourability score, by 2019 vote, December 2022**

Source: British Election Study, Wave 24, 2014-23

0 – strongly dislike to 10 – strongly like



Focus group participants, regardless of their vote intention, disliked Liz Truss and blamed her for the economic failure of the Conservatives. Harry, a careworker from Bolsover thought she was “a laughing stock and an airhead. She didn’t know what she was one about. She couldn’t string a sentence together. It’s not what you want leading your country really.” And Alison, who lives in South Cambridgeshire said the Conservatives lost her vote when Liz Truss came into power. “It was when she came and just absolutely destroyed the country ... and then she doesn’t apologise”

## Labour professionalism under Starmer

### Voters came to view Labour as more professional and moderate

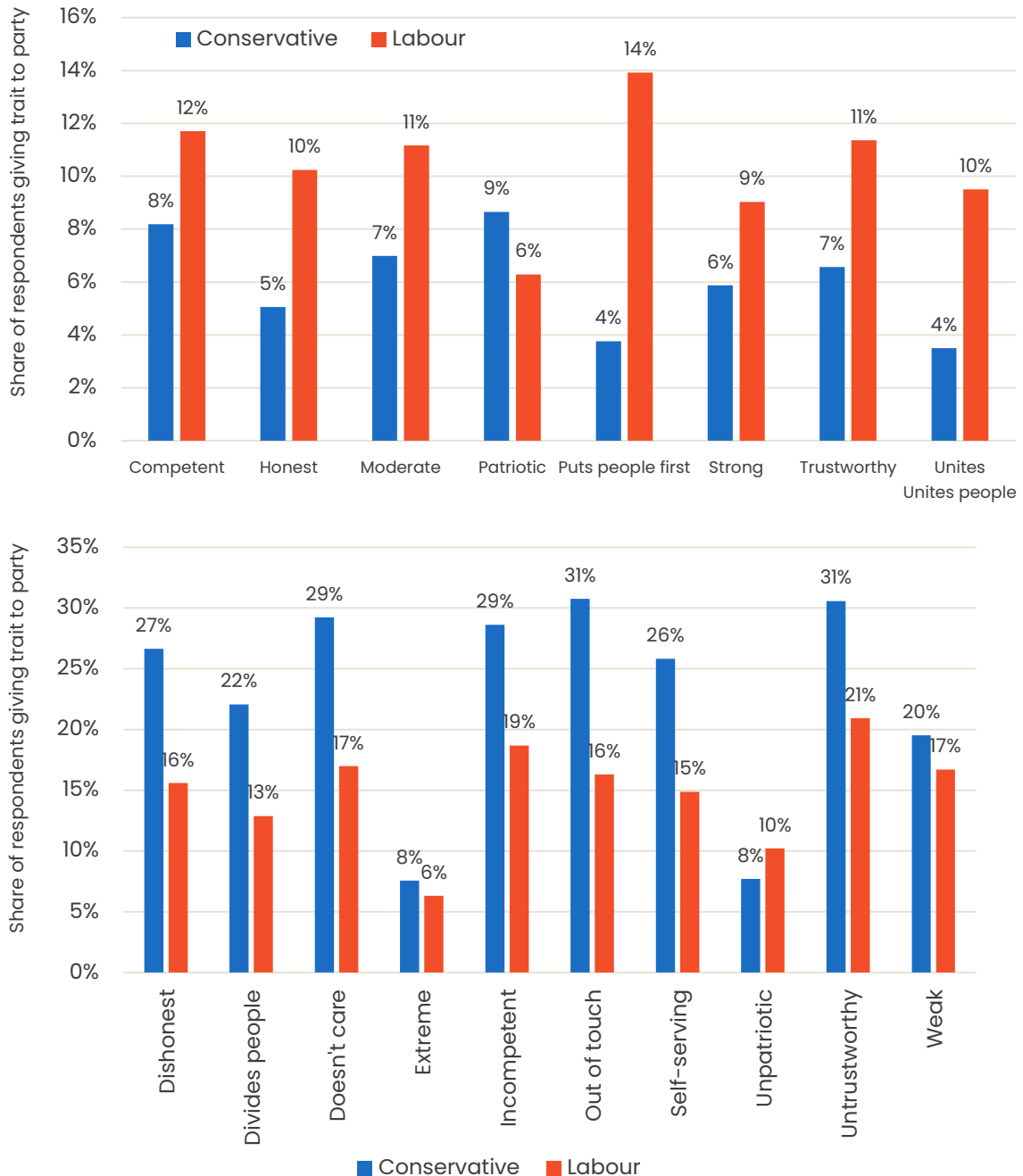
When asked which traits they associated most with each political party, the Conservatives led Labour in all negative traits. Some 31% said the Conservatives were “untrustworthy” compared to 21% saying this of Labour, 31% said they were “out of touch” (compared to 16% for Labour), and 29% said they were “incompetent”, compared to 19% for Labour.

Labour led the Conservatives in all positive traits with the exception of patriotism. 12% said Labour was “competent” compared to just 8% for the Tories, 10% said Labour was “honest” compared to 5% for the Tories, and 14% said Labour “puts people first”, compared to just 4% for the Tories - the largest gap on positive traits.

Jack, an accountant from Stevenage said, “He (Starmer) doesn’t seem like a chaotic man. He seems like he could just manage the situation a bit. I don’t think he’s going to be someone who’s going to change the world. But I think he might manage what we’ve got a bit better and be a bit stable.”

**Figure 53: Positive and negative traits associated with the Conservative and Labour parties**

Source: Onward-Focal foundational poll, 10th-28th May, 2024



## The Conservatives never recovered from Partygate

The Conservatives polled more favourably than Labour for most of 2020 and 2021, though the parties remained close, but this lead collapsed after “Partygate” and was compounded by the Mini-budget. Labour party favourability did not drastically increase and in fact mildly tapered off by the beginning of 2024, but the Tories were stuck on a consistent downward trajectory.

Focus group participants felt cheated and lied to by Partygate. It reinforced the sentiment among voters that there were “one set of rules for them and another set for us.”

Aiden, a careworker from Bolsover commented: *“I think it’s just the constant deceit of we will be doing this we will be doing this ... I’ve had two members of my family pass away when those Covid restrictions came in, and I didn’t even leave the house. I was on FaceTime and doing zoom calls to family and friends. And then to find out they’ve done all these parties and been seen to laugh and joke about it. No you’re not getting another one of my votes.”*

Emma, a social worker from Hartlepool said, *“because of him (Boris) the last Party I’m going to vote for is Conservative, because of Partygate while we were all in lockdown. Even the Queen was burying her husband alone.”*

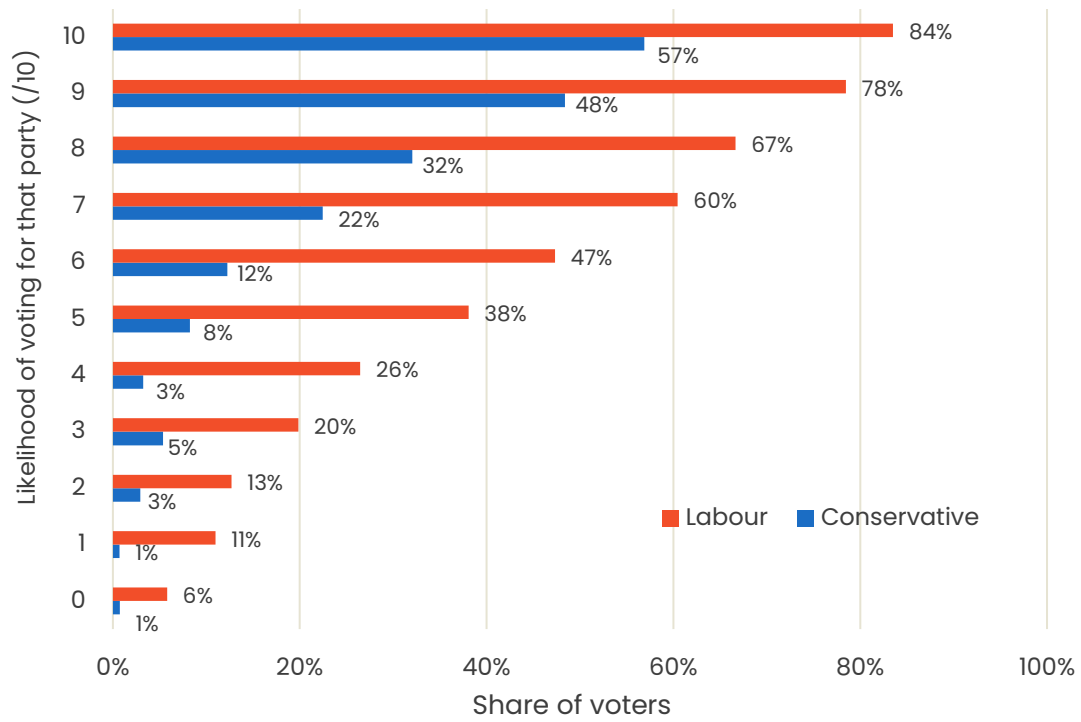
## The Conservative vote did not hold up while Labour’s did

Those who said they were likely to vote Labour in the 2020 British Election Study largely went on to do so. 6% of those who said there was zero probability they would vote Labour went on to do so in 2024, along with 11% of those who said there was only a 1/10 chance. Meanwhile, 84% of those who said they would definitely vote Labour (10/10) did. This means the Labour vote from 2020 broadly held up, while some were persuaded by Sir Keir Starmer by the time of the election.

In contrast the Conservative vote collapsed, with only 54% of those who said in 2020 they would definitely vote Conservative (10/10) actually doing so in 2024. Fewer than half of those who said there was a 9/10 chance they would vote Tory actually did.

**Figure 54: Stated voter probability of voting Conservative or Labour in June 2020, vs 2024 outturn**

Source: British Election Study, Wave 26, 2014-23, VI in June 2024



# The changing electorate



To understand the result of the 2024 election, it is not enough to only look at what happened during the six-week election campaign, or even just the events of the 2019-2024 Parliament. A broader historical perspective is critical for understanding the scale of the loss – and the challenges ahead for the Conservatives.

From opposition in 1997 to 2010, through to victory in 2010 and 2015, the turbulence in 2016 to 17, victory in 2019 and heavy defeat in 2024, the party has experienced significant shifts in the composition of its underlying voter coalition and hence its electoral fortunes.

The Conservatives built their 2019 coalition over time. One of the major factors behind the defeat is that while the 2019 Conservative Party raised its “ceiling” (the maximum number of votes it could hope to achieve) to higher than ever before, it also lowered its “floor”, meaning its potential coalition was larger but more volatile. Its constituent groups were more diverse than in previous elections, with correspondingly different (and sometimes conflicting) interests and preferences. The 2024 election result was a simultaneous collapse of different voter blocs that had made up the 2019 coalition.

This section examines the components of the British electorate by underlying social and economic values to understand the building blocks of any voting coalition.

## The segments of the British electorate

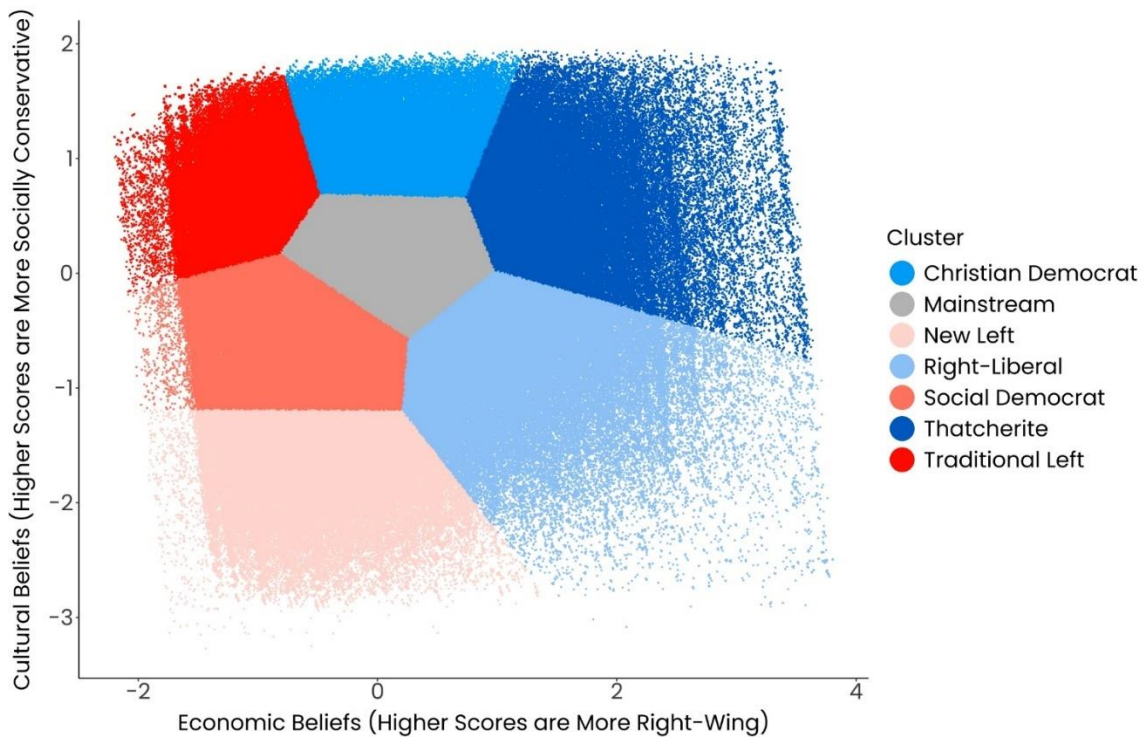
There are seven segments that constitute the British electorate. These have been created on the basis of answers to economic and social or cultural political values survey questions asked throughout the period, reflecting 810,728 observations.

The segments can be characterised as:

- **New Left:** Voters with economically left-wing and socially liberal or progressive values
- **Traditional Left:** Voters with economically left-wing beliefs but culturally conservative values
- **Social Democrats:** Voters with economically left-wing beliefs but moderate cultural values
- **Christian Democrats:** Voters with economically centrist beliefs but culturally conservative values
- **Thatcherites:** Voters with economically right-wing beliefs and culturally conservative values
- **Right-Liberals:** Voters who combine economically right-wing beliefs with culturally liberal values
- **Mainstream voter:** Voters whose voting behaviour mirrors national trends

## Figure 55: the segments of the British electorate by cultural and economic beliefs

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



### Snapshots of the segments - voting pattern

Each respondent's vote intention in each wave shows how they have swung between parties since 1986. This gives a long-term perspective on how Labour and Conservative parties have constructed their coalitions and when and why these have fractured. In order to provide more context, we also provide demographic information on these groups in 2024.

#### The right-leaning coalition

The segmentation analysis shows that the Conservative Party has historically depended on three distinct groups: Thatcherites, Christian Democrats and Right-Liberals. Although these groups differ in their political values, they have historically found common cause with one another in supporting the Tories.

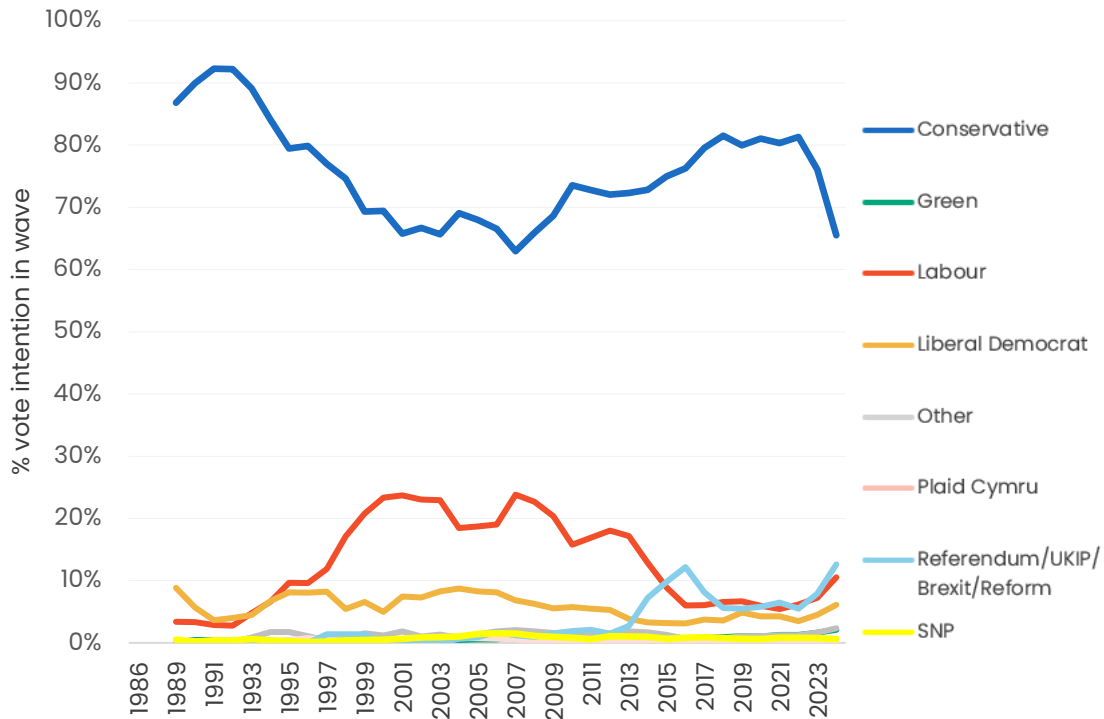
## Thatcherites

Thatcherites have historically shown the strongest support for the Conservatives. They made up 9% of the population in 2024. They are older, more likely to be white, male, and a homeowner. They are much more likely to live in the South East and less likely to live in the North, and have a similar rate of university education to the rest of the population.

In the peak of the New Labour era, 20% of these voters supported Labour. However UKIP, followed by the Brexit Party, captured much of the Thatcherite segment in the 2015 election and 2019 European elections. Just over half of Thatcherites still backed the Tories in 2024, but the segment split, with more going to Labour or Reform.

**Figure 56: Vote intention of the Thatcherite segment, 1986–2024<sup>12</sup>**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



## Christian Democrats

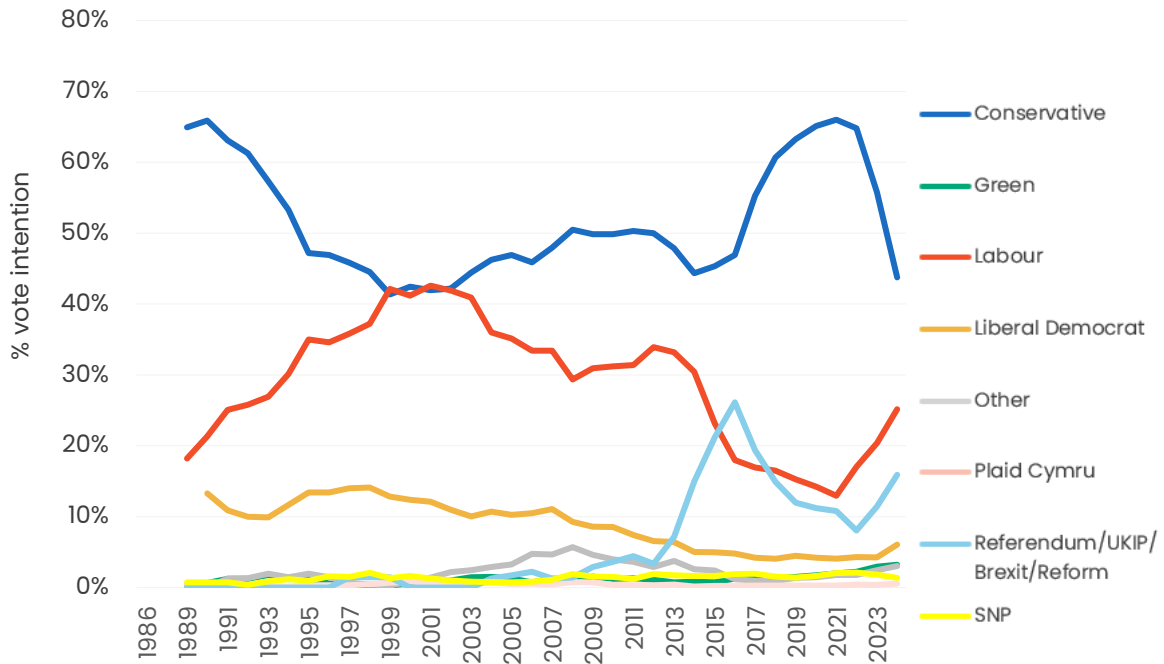
This segment represented around 11% of the population in 2024. The group is older, more likely to be white and with a higher rate of home ownership than average, but with a lower rate of university education. This group is less likely to live in London or Scotland but more likely to live in Yorkshire and the Humber, the North West or East of England.

Christian Democrats have tended to be solidly Conservative and hostile to Labour, with the only exception being the Blair period, when they were split with Labour. In recent years UKIP and the Brexit Party have taken a significant slice of the Christian Democrat vote, particularly in the 2015 election and 2019 European elections.

Support for the Conservatives since the pandemic has fallen sharply, with the group splitting three ways between Conservatives (33.1%), Labour (28%) and Reform (20%) in the 2024 election.

**Figure 57: Vote intention of the Christian Democrats segment, 1986–2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



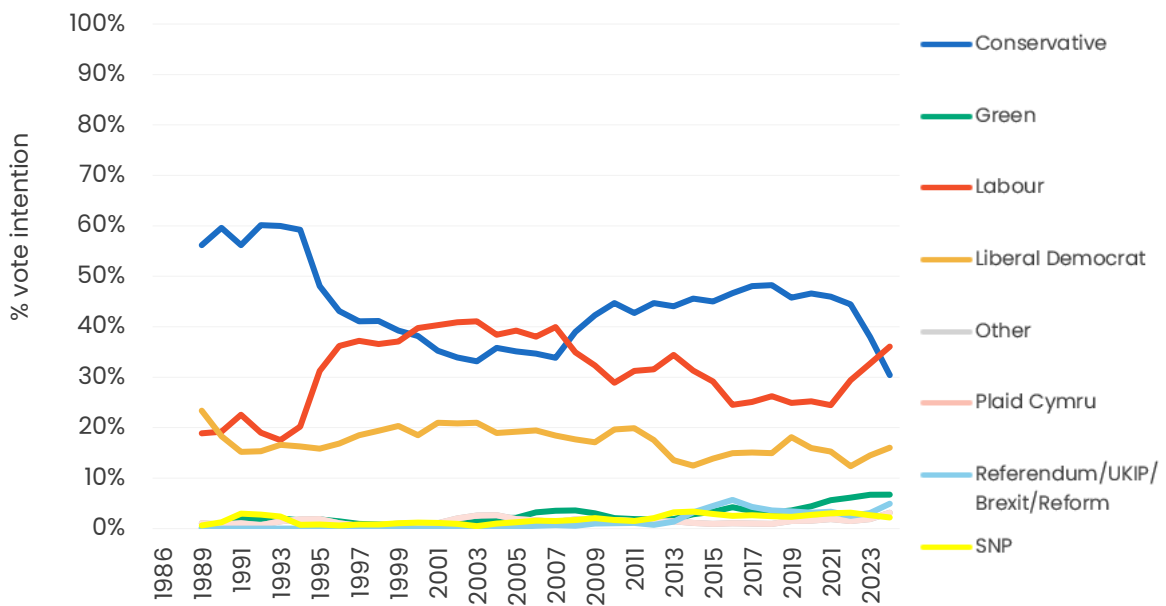
### Right-Liberals

This segment represented just under 17% of the population in 2024. This is the youngest and most ethnically diverse segment, with a slightly higher than average rate of university attendance, and is slightly more male. Right-Liberals are much more likely to live in London and less likely to live in Scotland.

Right-Liberals have tended to support the Conservatives but switched to Labour under Tony Blair’s leadership, returning to the Tories after his departure. This group’s support for the Tories declined to just 24.3% in 2024 from historic highs of over 50%. This group went back to Labour (35.3%) at Blair-era levels, with 16.8% backing the Liberal Democrats.

**Figure 58: Vote intention of the Right-Liberals segment, 1986-2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



## The left-leaning coalition

Labour has tended to draw its core support from Social Democrats, the Traditional Left and the New Left - a distinct ideological make-up from the right-wing coalition.

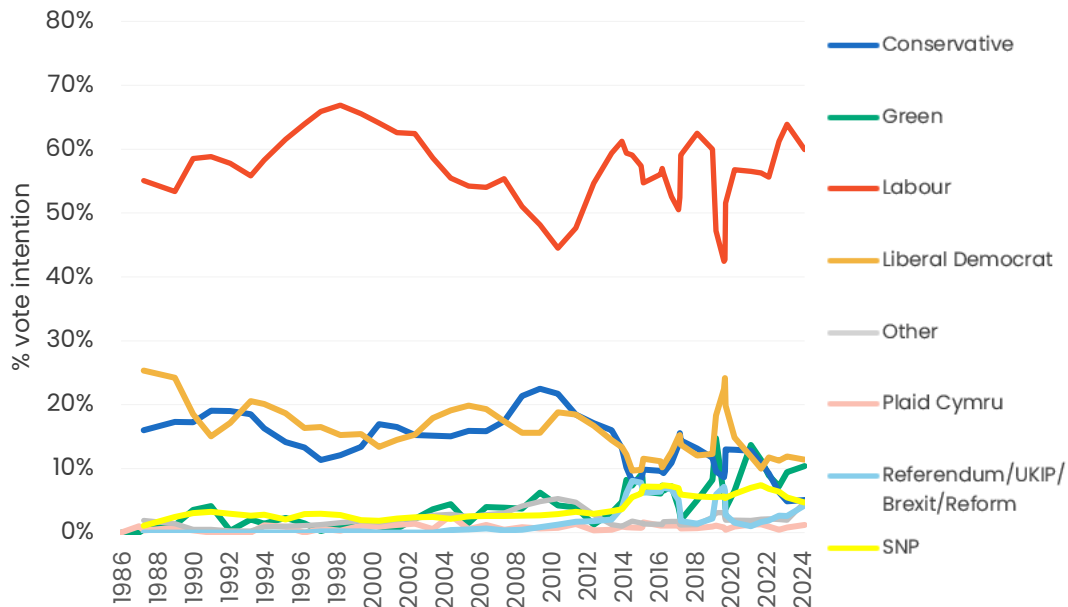
### Social Democrats

This segment represented just over 15% of the population in 2024. This group is slightly younger and less ethnically diverse than the rest of the population. It has a lower rate of home ownership than average but a higher university attendance rate. It is more likely to live in London, the South East and Wales.

This group has historically been solidly Labour, declining during the New Labour period but returning under the Coalition. This group shifted slightly to the Liberal Democrats in 2019. However, its support for Labour solidified again - in 2024, almost half backed Labour (50%), but also with higher than average support for the Liberal Democrats (13%), Green (10.4%), SNP (4%) and Plaid Cymru (1%).

**Figure 59: Vote intention of the Social Democrats segment, 1986–2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



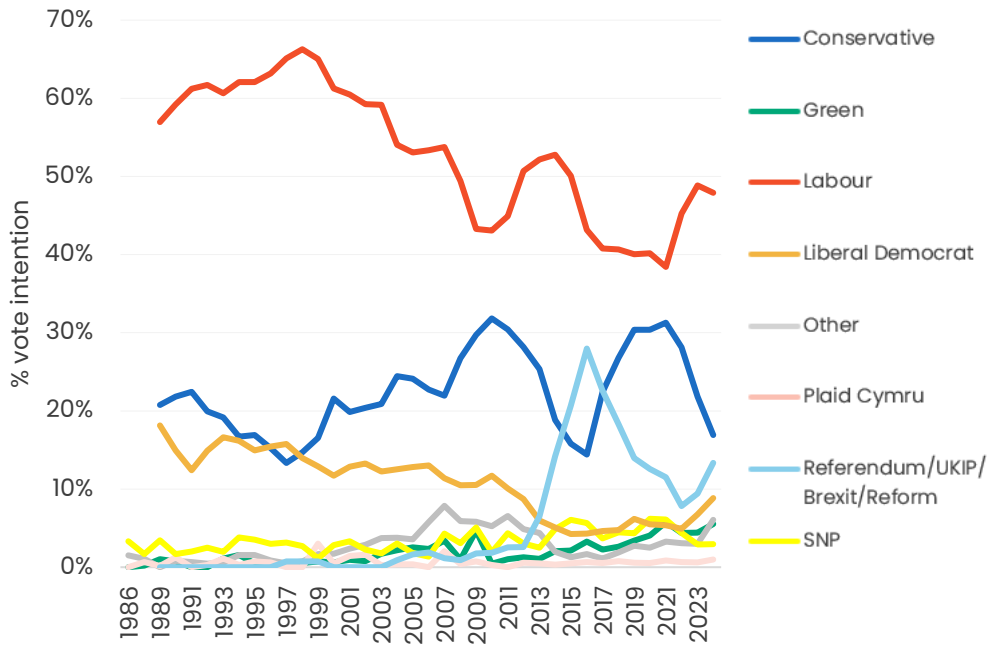
### Traditional Left

This segment represented over 17% of the population in 2024. This group was solidly Labour in the 1980s and 1990s but support declined under the Blair and Brown governments. It went back towards Labour during the Coalition era. UKIP and the Brexit Party took a large slice of the Traditional Left vote in the 2015 election and 2019 European elections, but the group moved sharply towards the Tories under the leadership of Boris Johnson.

The Traditional Left has a similar age profile to the average UK voter, despite perceptions of it being older. They are more male than average with a lower rate of home ownership and university attendance, and are more likely to live in the North West, Yorkshire and the Humber and Scotland. They can be described attitudinally as the traditional working-class Labour vote. Following the pandemic and “Partygate” scandals support swung back to Labour with 38% support in 2024, and with a higher than average rate of support for Reform (19%).

**Figure 60: Vote intention of the Traditional Left segment, 1986–2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



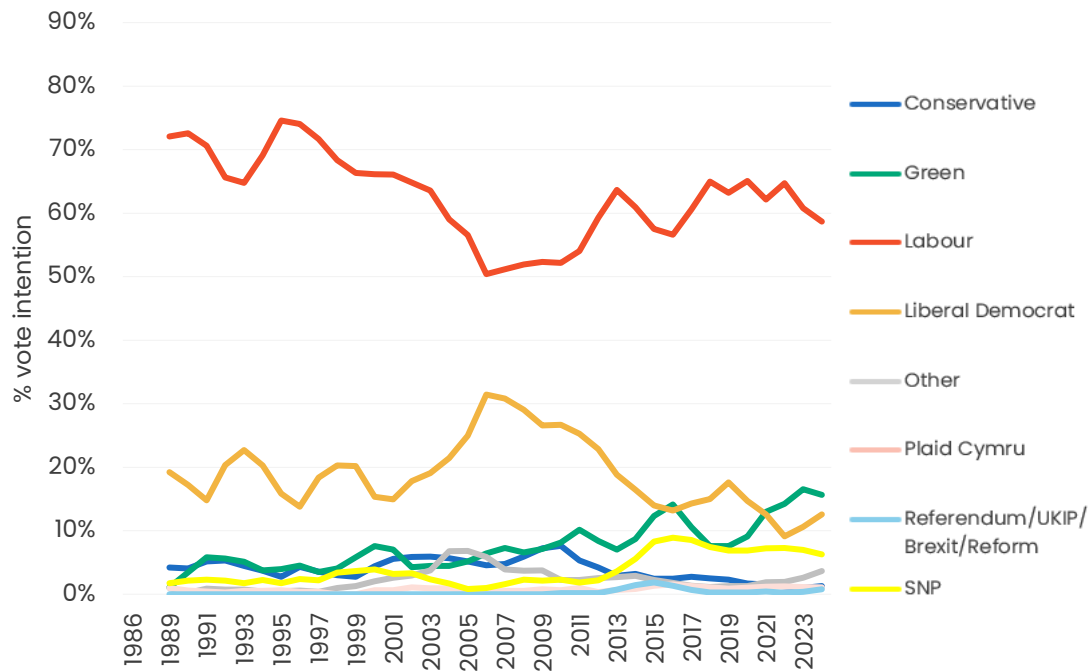
### New Left

This segment represented almost 7% of the population in 2024. This group has historically been solidly Labour, though this declined slightly during the New Labour period, switching partially to the Liberal Democrats. Support for the Liberal Democrats declined when they were in government during the Coalition, with an uptick for the Greens. Since the 2019 election this group has returned consistently to Labour. Just over half (50.9%) voted Labour in 2024, with 17% voting Green and 15.3% voting Liberal Democrat.

This group is starkly different from the rest of the population. It is much younger and more likely to have a university degree. They are also more likely to be white and more male than average, with a similar homeownership rate to others.

**Figure 61: Vote intention of the New Left segment, 1986-2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



### The Mainstream voter

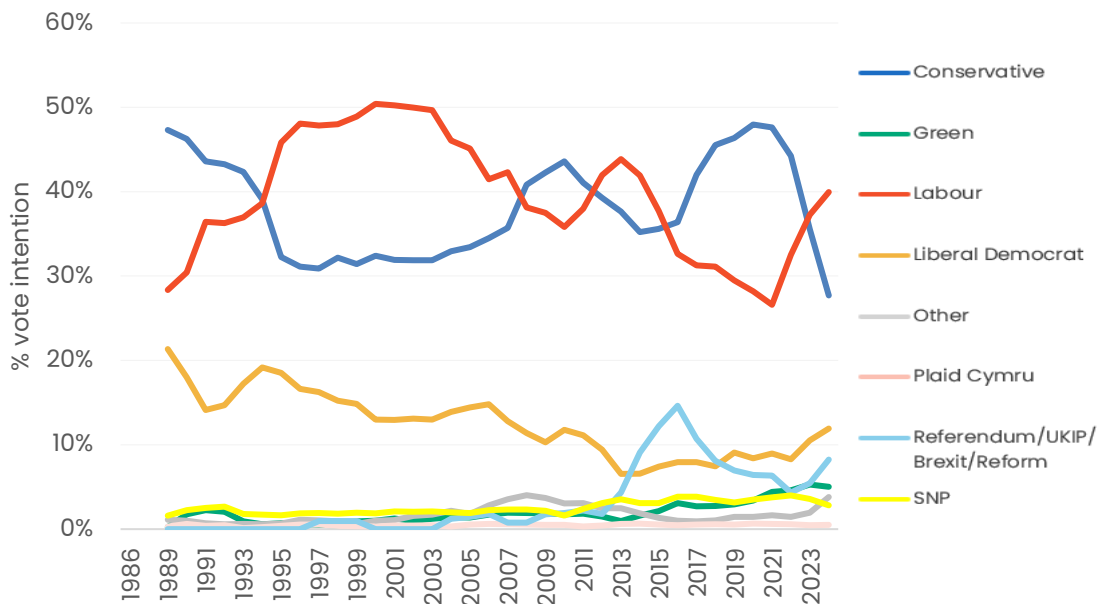
The Mainstream group is the “weathervane” group - their voting patterns mirror national trends. Unlike the other segments, their vote tends to fluctuate between Labour and the Conservatives, and they have switched their majority support between the two main parties repeatedly. The winning party at every general election over the last nearly four decades have had the support of a plurality of Mainstream voters.

This segment makes up the largest share - nearly a quarter (23.6%) of the population. They are slightly more likely to be female, younger, and less white than the average voter. However, this group has similar levels of home ownership and university education to average. It is regionally well distributed and is similar to the population as a whole, although they are overrepresented in London.

This group generally backed the Conservatives under Thatcher and the early Major before switching to Labour under Blair. They marginally backed the Conservatives under David Cameron in 2010 but returned to Labour during the Coalition government. They backed the Conservatives strongly in 2017 and 2019. However, they returned to Labour during the pandemic from 2021 onwards. Their level of support for the Conservatives exactly reflected the UK-wide result (23.7%).

**Figure 62: Vote intention of the Mainstream voter segment, 1986–2024**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



### Sir Keir Starmer assembled a workable but diverse coalition

Labour’s overall vote share only rose by 1.6 percentage points between 2019 and 2024, but it was distributed much more efficiently. It has united voters from across the segments, solidifying its support among Social Democrats, the Traditional Left and the New Left while winning a plurality of the Mainstream. It managed to win Right-Liberals at similar levels to Tony Blair, while making inroads into the Thatcherite and Christian Democrat segments of the right-wing coalition.

Labour managed to tap into widespread dissatisfaction with the Conservative Government. It won seats across urban, suburban and rural areas in the North, South and Midlands, as well as winning back Scottish and Welsh constituencies. By running on a policy-light platform, Starmer avoided deterring ideological groups based on policy disagreement. Instead, he was able to win by offering competence, change and by capitalising on anti-incumbency.

Maintaining such a diverse coalition will not prove easy, as these groups have conflicting priorities. The Traditional Left and Right-Liberals have opposite views on how the economy should be run, for example, and may react very differently to any tax rises or spending decisions the Labour Government decides to enact. With the increased marginality of British politics, Labour may encounter a similar difficulty holding its coalition together in government as the Conservatives did.

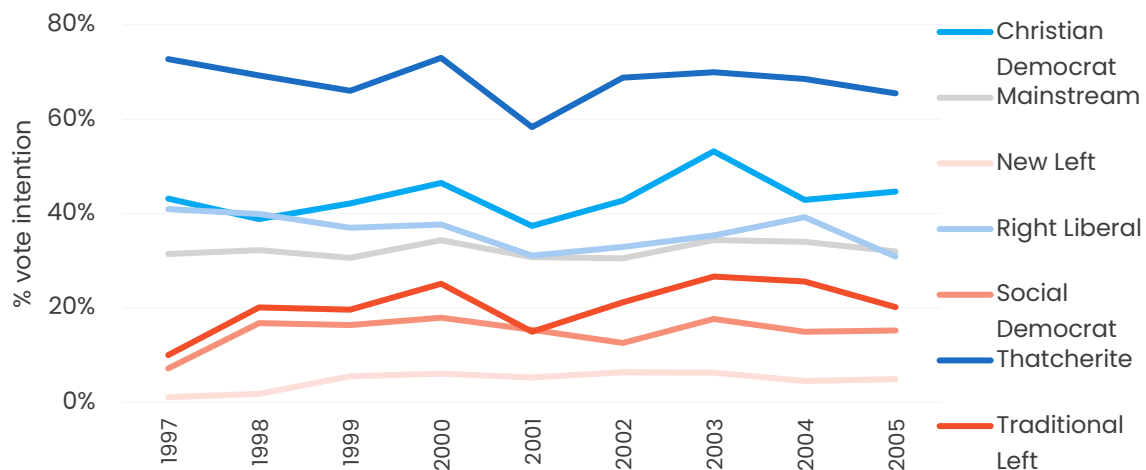
## How the Conservative coalition was built and destroyed (1997 - 2024)

The 2024 election is as much about the collapse of the Conservative coalition as it is a story of Labour success. The party successfully brought itself back from the edge of electoral oblivion after 1997, building a broad coalition piecemeal from disparate electoral groups.

By 2019, their coalition was heterogeneous and therefore unstable. The 2019 majority was won by combining traditional Conservative support with new Conservative voters traditionally outside the coalition, making for wide but shallow support. It was therefore vulnerable to multiple blocs deserting it at once.

**Figure 63: Conservative vote intention by segment, 1997-2005**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



After the 1997 election, many Conservatives viewed the result as an aberration, expecting a swift return to power. Attempts at modernisation or reaching swing voters were abandoned in favour of shoring up the core vote. The party spoke a lot about political issues such as Europe, and policy areas such as immigration - a much smaller concern in 1997, when net migration was below 100,000 per year.<sup>13</sup> These issues mattered to Conservative MPs, members and party loyalists but much less at the time to the wider electorate.

As Michael Ashcroft wrote after the 2005 election: "After the Labour landslide of 1997, for example, a theory did the rounds that not only had a million Tory voters switched to the Referendum Party or UKIP, but millions more had stayed at home. This was not, as it happened, true (over 2 million 1992 Tories switched directly to Labour), but that did not discourage some commentators from declaring that the answer for the Conservative Party was simply to mobilise the heartland."<sup>14</sup>

This belief, however, proved to be a serious misjudgment. The 2001 general election served as a stark reality check for the Conservatives, with the party making a net gain of just one seat - winning nine but losing eight others. The party made no significant gains with the segments needed for victory. For example, they stayed at 31% of the Mainstream segments' vote in 1997 and 2001.

### Lack of improvement: 1997 - 2005

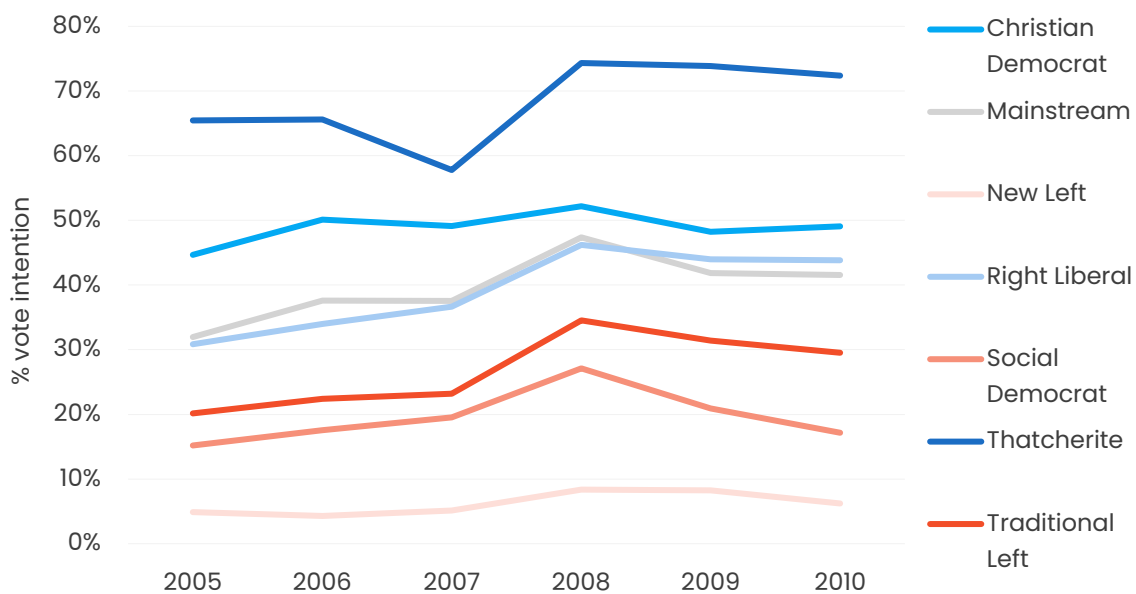
From 1997 to 2005, despite three different leaders, the Conservative party made no significant gains against Labour. The core support base was relatively stable, but not sufficiently so for a majority. Christian Democrats increased their vote for the Conservatives from 43% to 45%, but Thatcherite and Right-Liberal support actually fell from 1997 onwards.

Despite gaining 33 more seats in the election of 2005, there was little fundamental shift in the party's support base. Its share of the popular vote rose by just 0.7% but fell in Labour-held seats. The third consecutive defeat eventually led to the "Smell the coffee" moment, when it was recognised that fundamental change was necessary to regain power.

The party's experience from 1997 to 2005 shows the difficulty in rebuilding support after a major electoral defeat. This is all the more true given that 2024 was a worse result in terms of seat and vote share than 1997.

**Figure 64: Conservative vote intention by segment, 2005-2010**

Source: British Social Attitudes (BSA) survey and British Election Study (BES)



## David Cameron in Opposition – 2005–10

The period from 2005 to 2010 marked a turning point for the party's prospects. There was an upward trend across all voter segments.

During this period, the party actively worked to restore credibility as a potential governing party by demonstrating competence, detoxifying its image and showing appeal to a wider electorate. It even spoke about environmental and social justice issues, which had traditionally been topics less associated with the party.

David Cameron's strategy of modernising the party played a significant role in its electoral recovery. The Mainstream segment went from 32% support for the party in 2005 to 42% in 2010, indicating the party was beginning to reconnect with voters who had previously voted Labour.

At the same time, the core vote solidified. Christian Democrat support grew from 45% in 2005 to 49% in 2010, and the Thatcherite group – the strongest for the Tories – rose from 65% support in 2005 to 74% in 2008-9 and 72% in 2010. It is the efforts of this period that the Conservative Party should be prioritising in its time in Opposition in 2024.

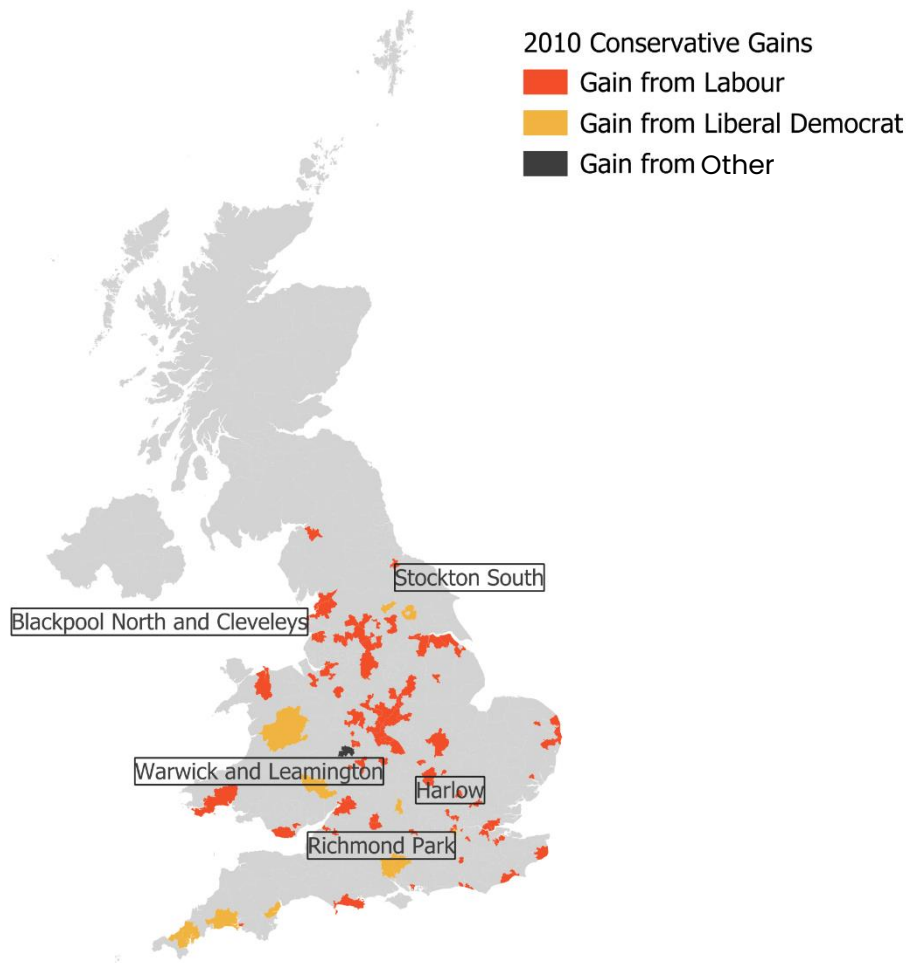
## But the Conservatives failed to win a majority in 2010

All these efforts, however, were not enough for victory. Despite gaining a plurality of votes nationally (36.1%), the party was not able to gain an overall majority. The party had won higher levels of support from Mainstream voters in 1987 and 1992, and while Cameron had increased its level of support from Right-Liberals, it fell short of what it achieved with this segment in those years.

Distribution of support was a problem for the party in 2010. They had successfully broadened their appeal, but struggled to translate this into seat gains. Its vote had become more efficient than in 2005 (or in 1997 or 2001), but it was still not enough.<sup>15</sup> In contrast, in 2005 Labour had converted 35.2% – a lower vote share – into 55.2% of the seats (an overall majority).

### Figure 65: Map of 2010 gains by constituency

Source: House of Commons Library, 2010 General Election results



### A workable but limited coalition: 2010 – 2015

From 2010 to 2015 the Coalition Government pursued a right-of-centre policy agenda – reducing real terms government expenditure, freezing public sector pay and cutting benefits in real terms. By 2015 the economy had shown signs of recovery with falling unemployment and moderate growth, with improving perceptions of Conservative economic competence.

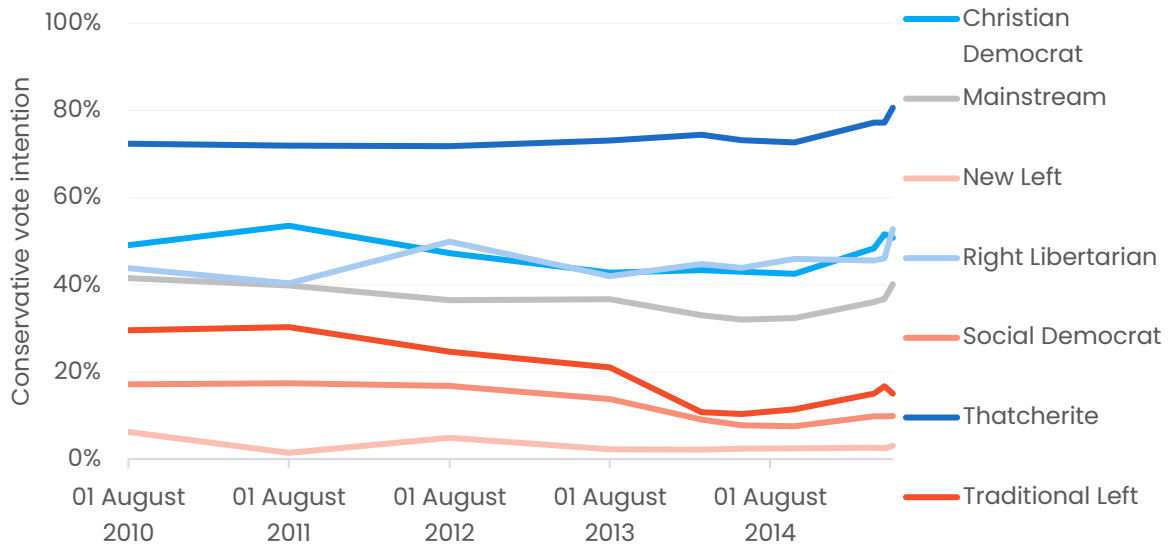
Some focus group participants reproached the Cameron years and remembered painful austerity cuts. Kwaku, an occupational therapist from Stevenage commented “I work for the NHS and I can see it happening every single day. A lack of nurses, lack of resources, waiting times, the public is getting older. It’s just not nice to see. That all started from that David Cameron era.” Roger, now retired and living in South

Cambridgeshire felt that Cameron had not done much for him, saying “*life seemed to be the same struggle it had always been.*”

During the Coalition Government the Conservatives experienced fluctuating support but with small, steady gains across multiple segments in the run-up to the 2015 election.

**Figure 66: Conservative vote intention by segment, 2010–15**

Source: House of Commons Library, 2010 General Election results



During this period Conservatives enjoyed a shoring up of the Thatcherite vote segment, which rose to above its 2010 level, together with an increase in support from Christian Democrats and an uptick in support from Right-Liberals. After losing support during the Coalition period, the party experienced an improvement among the Mainstream in 2015.

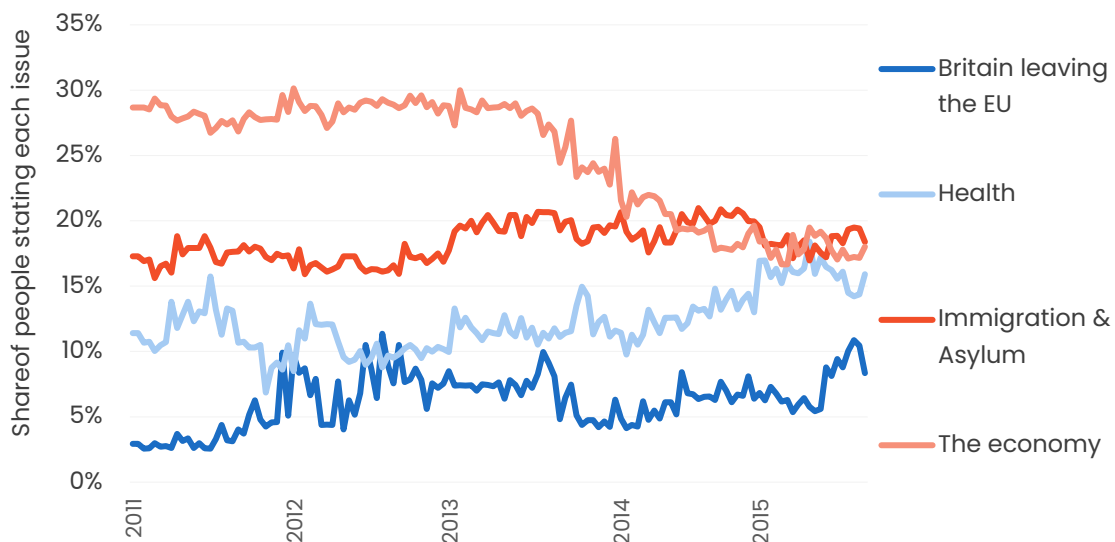
The 2010 - 2015 Government also implemented socially liberal policies such as same-sex marriage. This helped win over Right-Liberals, whose support for the party increased from 44% in 2010 to 53% in 2015. However, this strategy also created tensions within the more socially conservative elements of the party’s support base. The issues of immigration and the UK’s EU membership became increasingly prominent during this period.

Right-Liberals from the focus groups liked Cameron, but disagreed with his choices around Brexit. Aisha, a stay at home mum from South Cambridgeshire said she “*really liked David Cameron until Brexit ... I felt confident with him, and then with the whole Brexit thing it just blew my mind. And then the fact that he just resigned. How have you made this happen, in my opinion made a massive bomb shell, and then just*

walked away?” And Stuart, a tech recruitment consultant from Tunbridge Wells – “I do think Cameron had a good international presence. I think he commanded respect. But I do blame him for taking us to the Brexit vote in the first place. It didn’t mean to happen. It was just a vanity thing.”

**Figure 67: Salience of selected political issues, 2011–16**

Source: YouGov tracker on most important issues facing the country<sup>16</sup>

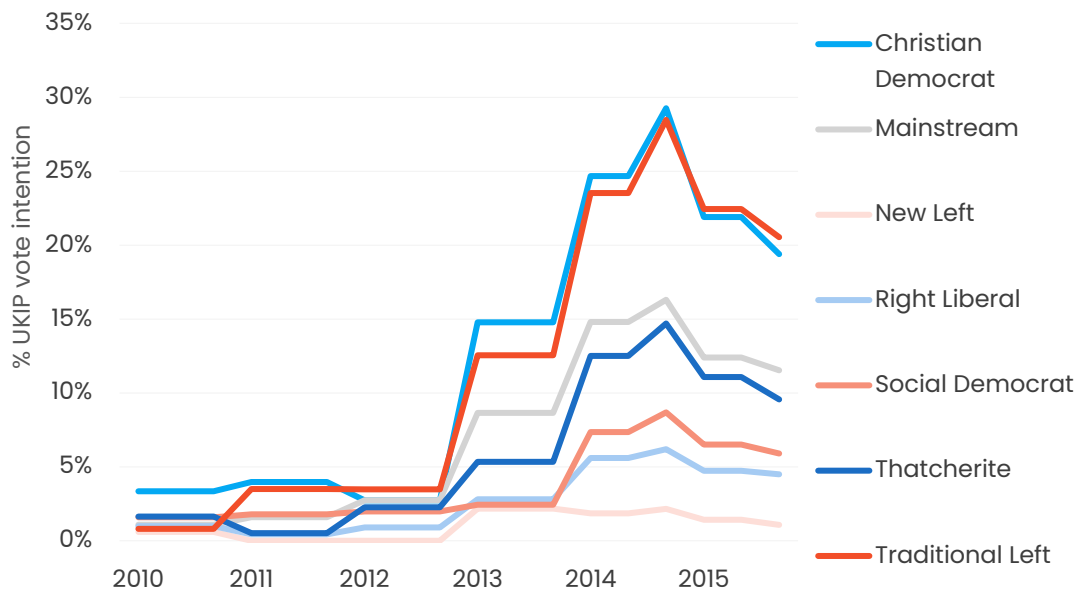


## Immigration, Europe and the rise of UKIP

The rise of UKIP presented tough choices for the Conservatives. The increased salience of Britain’s EU membership and the issues around immigration and asylum contributed to increased support for the Eurosceptic party – an early taste of the difficulties faced by a party trying to maintain a coalition of both socially liberal and socially conservative voters. David Cameron’s 2013 pledge of an in-out referendum on Britain’s EU membership was in part an attempt to address the challenge from UKIP and unite the factions within the party.

**Figure 68: UKIP voting intention by segment, 2010-15**

Source: British Election Study; British Social Attitudes Survey



Christian Democrat support for UKIP increased from 3% in 2010 to 23% in 2015, peaking at 29% in the 2014 European elections. This was true to a lesser extent of Thatcherites, who increased their support for UKIP from 2% in 2010 to 15% in 2014 and 10% in 2015. The Labour party also lost out to the rise of UKIP - 1% of the Traditional Left supported UKIP in 2010 but 28% supported them at the 2014 European elections and 26% at the 2015 general election.

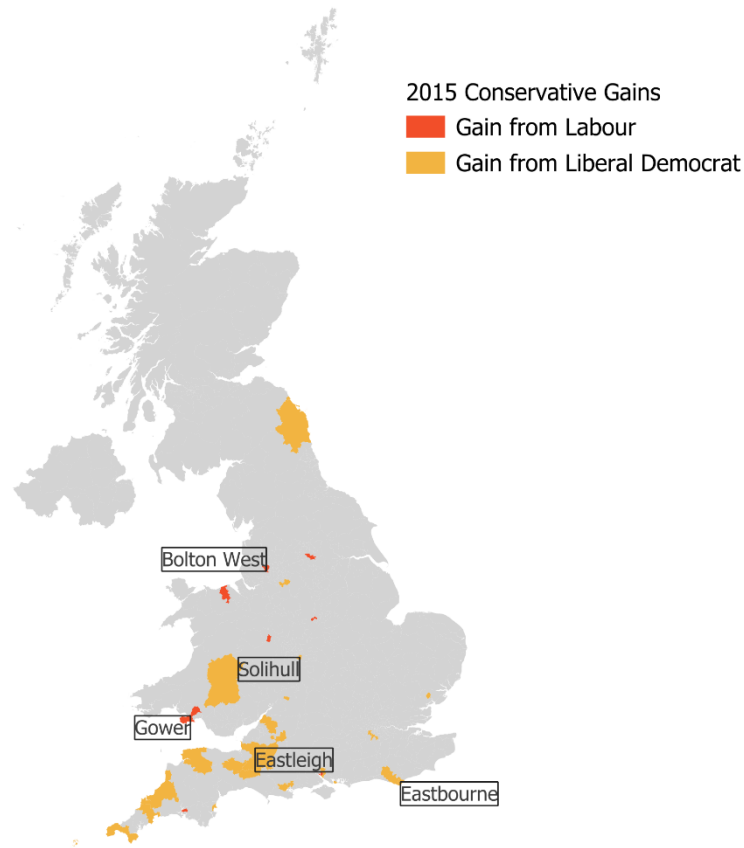
Being in government with the Liberal Democrats gave the Tories limited room for manoeuvre to counter the rise of UKIP, but they managed to establish an alliance of traditional “base” support with strategically targeted marginal seats.

The Conservative campaign in 2015 became increasingly targeted, focusing on winnable marginal seats rather than building widespread appeal. This included the successful “decapitation” of Liberal Democrat MPs in seats demographically favourable to the Tories. This may have lowered their vote ceiling, but produced a higher floor - a situation similar to that facing Labour in 2024.

## 2015: A narrow victory

### Figure 69: Map of 2015 Conservative seat gains

Source: House of Commons Library general election results 2024



The Conservative strategy resulted in them winning an unexpected majority, having maintained a delicate balance between different voter groups. They retained most of their traditional base while making inroads with more left-leaning voters.

However, the underlying vote patterns remained largely unchanged. The distribution of support across voter segments stayed relatively constant, suggesting the party had not fundamentally altered the political landscape but had optimised within existing parameters. Although UKIP gained only one seat it achieved nearly 13% of the popular vote, having come first in the 2014 EU elections only a year earlier – a sign of things to come.

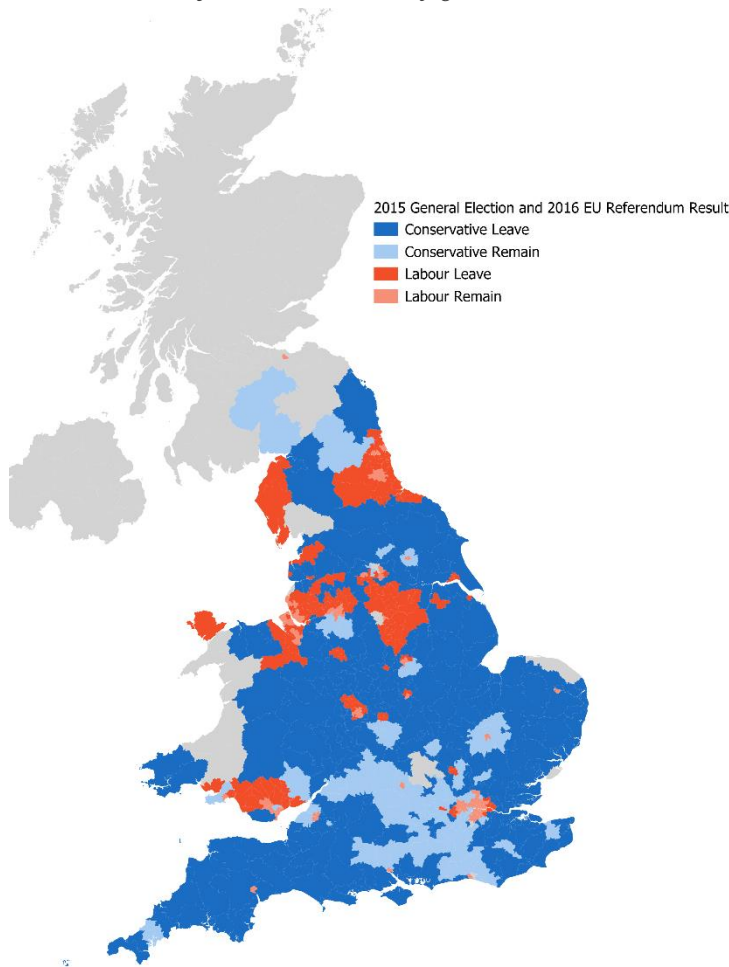
## The coalition shifts: the EU referendum and the road to 2019

The period from 2016 to 2019 was defined by the fall out from the Brexit referendum. This era saw a major realignment of voter coalitions, challenging traditional party loyalties and creating new dynamics.

The Leave victory revealed tensions within both major parties. Among Conservative-held constituencies, 247 voted Leave while 83 voted Remain, yet the Conservative Prime Minister had publicly endorsed the official Remain campaign. 149 Labour constituencies voted Leave and 83 Remain, in spite of the party also officially backing Remain. Given the country's first past the post system, there was potentially more to be gained by targeting Leave voters after the referendum as these were more evenly distributed, making their votes more efficient.

### Figure 70: Map of 2015 general election and 2016 EU referendum results by constituency

Source: House of Commons Library general election and EU referendum results



But retaining support from Remain voters would also be important to maintain the Conservative coalition. For example, the Traditional Left segment, which had historically been resistant to the Tories, voted to Leave by 73%, presenting a new potential inroad for Conservatives. Christian Democrats also voted Leave by 73% and Thatcherites by 60%, meaning all three major electoral segments that are important for the Conservatives had strongly supported Brexit. Mainstream swing voters backed Leave by 56% (higher than the national average of 52%), making them a strategic target.

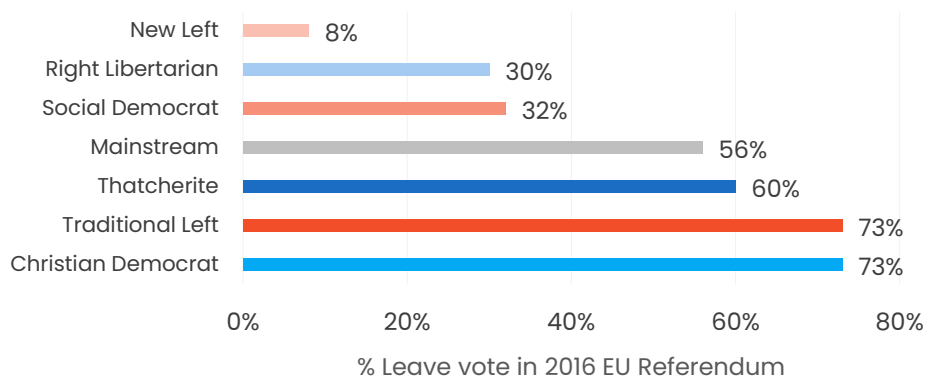
Focus group participants from Hartlepool, which voted nearly 70% in favour of leaving the EU shows support for Brexit among groups that might not have tended Conservative. When asked why they voted Conservative in 2019, Emma, a social worker said: “I believed in what they were saying at that time and I felt strongly about Brexit. I don’t always vote for a particular party, I vote for the values.” And Gary, a McDonalds worker, said, “I vote for the individual rather than the party itself. I voted for them because of Brexit - they had a better handle on the situation.”

At the same time, however, Right-Liberals (traditionally aligned with the Conservatives) voted only 32% to Leave. This presented a difficulty given their importance to the Conservative electoral base. Brexit preference did not map onto traditional party divides. Jane, a carer from Bodmin thought the biggest mistake the Conservatives made was Brexit. “Brexit was the big thing, and then it was a domino effect. Brexit was the start, then everything else followed.” John, now retired and living in Cannock Chase, made up his mind not to vote for the Conservatives in 2024 and vote for the Liberal Democrats instead because “Brexit was a disaster for the country.”

A further complication was that most MPs, both Labour and Conservative, had backed Remain, presenting a disconnect between Parliament and voters.

**Figure 71: Leave vote in 2016 referendum, by segment**

Source: House of Commons Library general election and EU referendum results



## The 2017 election: the Conservatives fail to form a new coalition

The snap election called by Theresa May in 2017 was the first major test of the new dynamics unleashed by the Brexit referendum. The outlook for the Conservatives was initially very strong, with the first YouGov poll following the announcement of the election putting the party on 48% - a 24-point lead over Labour.<sup>17</sup>

However, issues in the campaign such as the so-called “Dementia Tax”, Theresa May’s poor personal performance and perceived U-turning at the “Nothing has changed” speech ultimately saw this poll lead disappear.

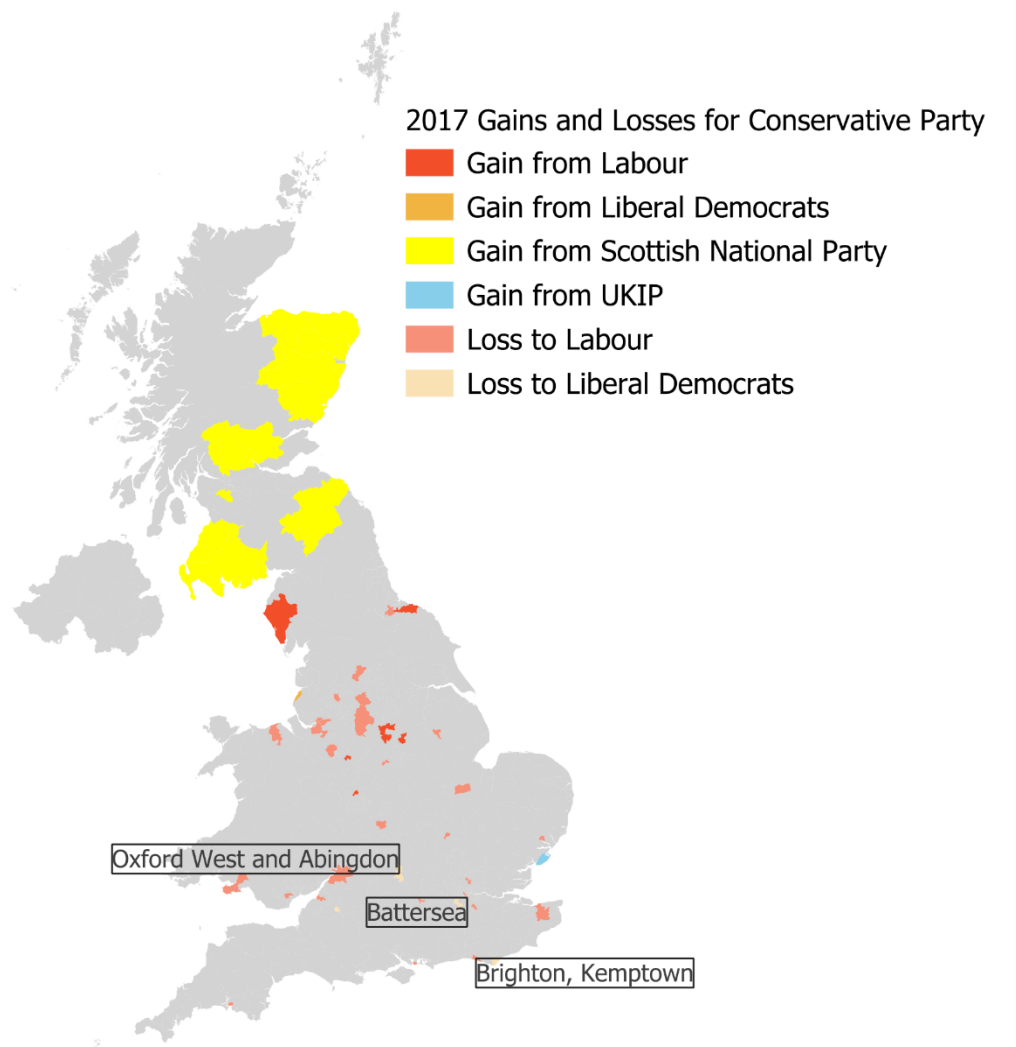
Focus group participants liked Theresa May - many thought she was honest and had integrity but felt pity for her and her handling of Brexit. Emma, a childminder from Tunbridge Wells said she *“would have liked to have seen Theresa May be in for longer. She chose what was good for the country, but in the Tory party they all look after themselves.”*

The party increased its vote share but lost its majority. While its vote share went up by 5.5 points compared to 2015 - its highest share of the vote since 1983 - it lost 13 seats and its overall majority. However, the geographical distribution of gains and losses reflected the beginning of a political realignment based on Brexit preference, with gains made in Leave-supporting areas such as Mansfield, Middlesbrough South and Cleveland East, and Walsall North.

However, the party lost Remain-backing areas such as Battersea, Brighton Kemptown, and Oxford West and Abingdon. The party was pivoting to less affluent, Leave-backing and traditionally Labour areas but losing in affluent constituencies that voted Remain.

**Figure 72: Map of 2017 Conservative gains and losses by constituency**

Source: House of Commons Library general election and EU referendum results

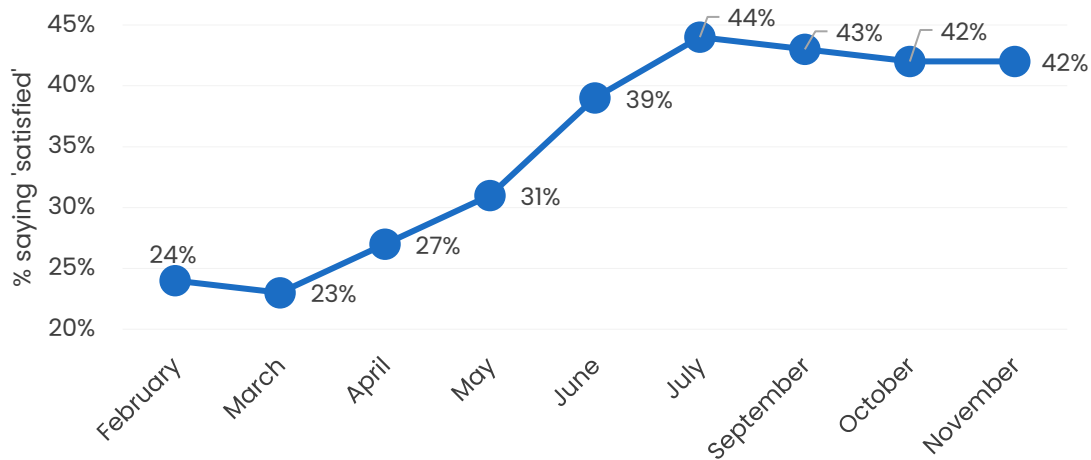


The first past the post system was crucial for denying the Conservatives a majority. There were extremely tight margins, with the party coming second by less than 1,000 votes in 19 seats. A swing of just 528 votes in the right constituencies could have been enough to win outright with 326 seats.<sup>18</sup>

However, the Labour vote share under Jeremy Corbyn did surge, securing 41% of the vote. Jeremy Corbyn's personal popularity grew significantly.

### Figure 73: Net satisfaction with Jeremy Corbyn's leadership of the Labour party, 2017

Source: Ipsos political monitor satisfaction ratings, 1997-present



### Advantages and disadvantages of realignment

The 2017 election revealed the potential gains for the Conservatives with a new electoral coalition focused on Leave-supporting areas, but also the risks. By reaching into traditionally Labour-held parts of the country they revealed a higher ceiling of support, but their losses in Remain-backing Conservative strongholds indicated a lower floor. This meant a more volatile electoral landscape.

### Brexit wars and the road to 2019: completing the realignment?

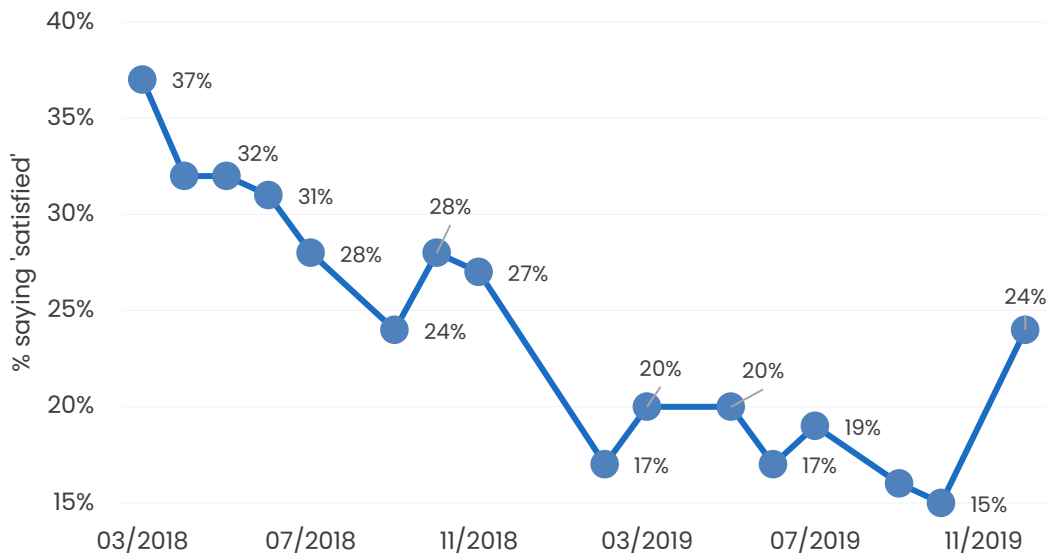
The UK was not due to participate in the 2019 European Parliament elections as it was due to have left the EU. However, after Britain's prolonged exit process the UK returned MEPs to Strasbourg. The Conservatives came fifth in this election, dropping to just 9% of the vote, with Nigel Farage's Brexit Party coming first followed by the Liberal Democrats - a result suggesting voters were voting along Brexit preference lines.

The lead-up to the 2019 general election also saw Jeremy Corbyn's favourability fall from its 2017 peak. His reluctance to blame Russia after the Salisbury poisoning in March 2018 was seen by many as weak. Meanwhile anti-Semitism in the Labour party became a major problem for the party's image. Labour's lack of clarity on its Brexit position caused further frustration, alienating both Leave-backing and Remain-backing traditional Labour voters.

By October 2019 the public gave a net -60 satisfaction rating for Corbyn as Labour leader, which only improved to -44 by the time of the election in December. Shauna, a cleaner from Bolsover thought the 2019 Conservative Party was “*more in touch with the normal person than Jeremy Corbyn.*”

**Figure 74: Net satisfaction with Jeremy Corbyn’s leadership of the Labour party, 2018-19**

Source: Ipsos political monitor satisfaction ratings, 1997-present



Not a single focus group participant from any corner of the country had anything positive to say about Jeremy Corbyn. In Bodmin, a deep dislike of Corbyn drove most participants to vote Conservative. Nigel, who works in the care industry, “*I couldn’t bring myself to vote for Corbyn.*” Leila, a legal secretary, and Paul, who works in an IT company, both from South Cambridgeshire said the main reason they voted for the Conservatives in 2019 was because of their deep disdain for Corbyn.

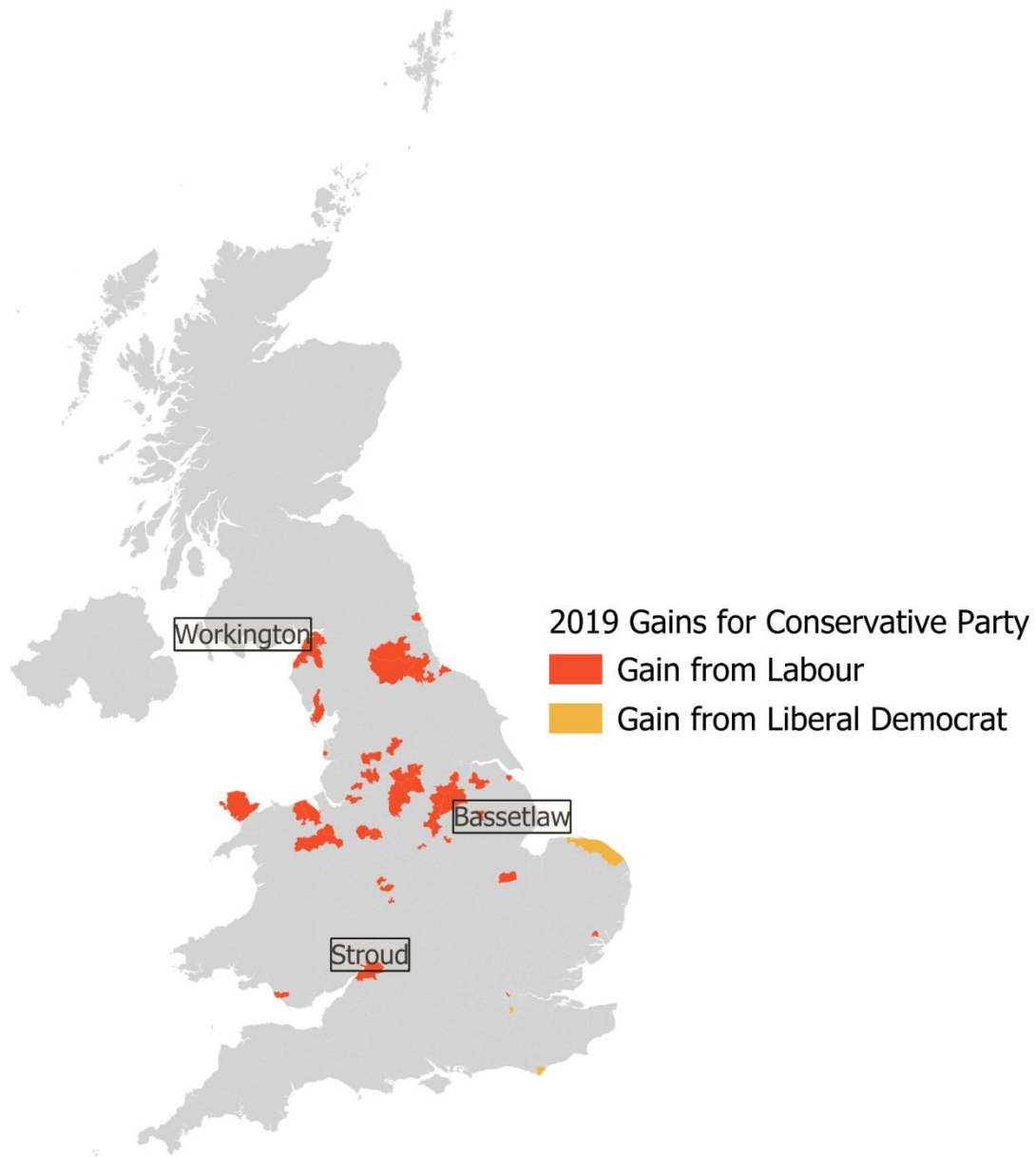
### The appeal of Boris Johnson and “Get Brexit Done”

By late 2019 the political situation had changed, with Boris Johnson taking over from Theresa May as Prime Minister with a clear pledge to take Britain out of the EU. His strategy of proroguing Parliament to prevent further parliamentary blocks on EU exit and expelling rebel Conservative MPs positioned the party to capitalise on the Leave vote. By securing a modified Withdrawal Agreement with Brussels, Johnson was also able to offer the electorate a so-called “oven ready” deal, rather than presenting the public with a choice or staying in the EU, a second referendum or No Deal.

The campaign slogan to “Get Brexit Done” sought to appeal to both sides of the Brexit divide, delivering on the democratic vote of Leave supporters but also ending the frustrations of those who backed Remain but wanted a resolution to the deadlock over Brexit. Natalie, a police officer from Bolsover commented: “Johnson was down to earth and tried to get Brexit done and succeeded, maybe not on the best terms, but he kept to a promise.” And Anne, now retired from Hartlepool said, “Johnson got us through Brexit, and people voted for Brexit.”

**Figure 75: Map of 2019 gains for the Conservative party by constituency**

Source: House of Commons Library, 2019 general election results



As a result, the party made major gains in the election in the North East and so-called 'red wall' - areas of the North and Midlands that were traditional Labour heartlands but had strongly voted Leave.

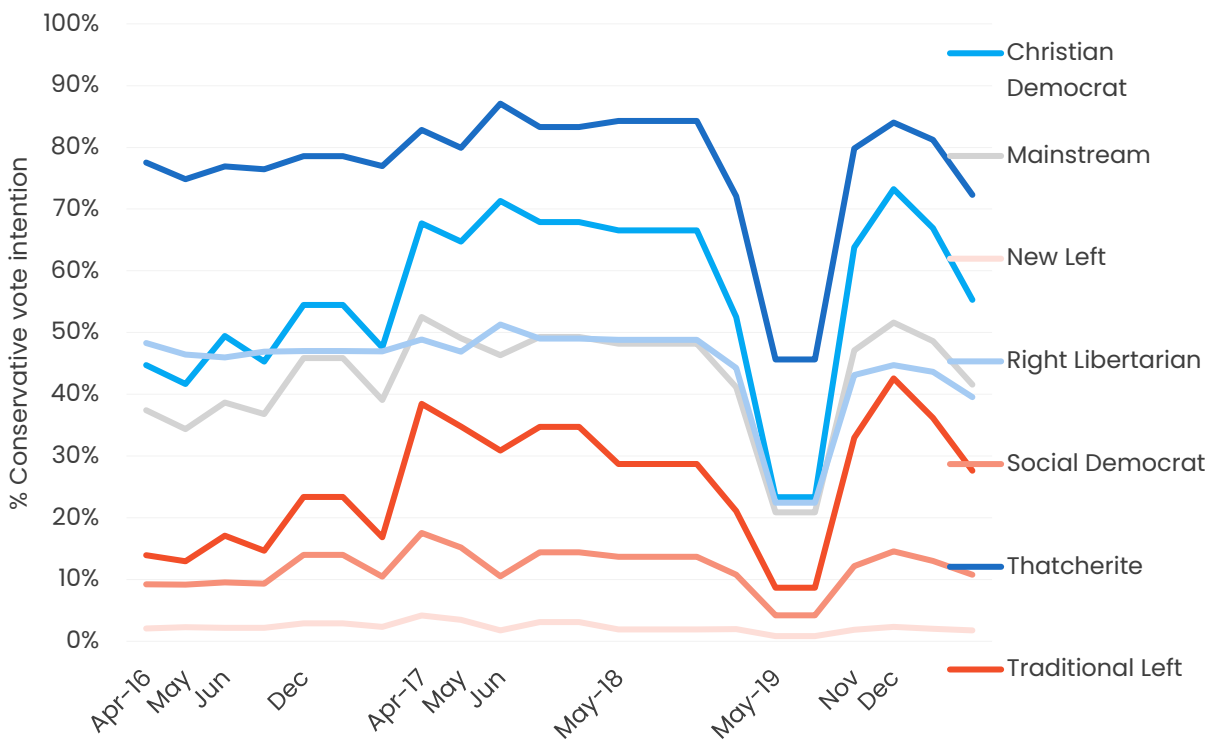
### The changing base of Conservative support - winning the Traditional Left

The electoral realignment has been both gradual and volatile. While Thatcherites have always had a high level of support for the party, in 2016 Christian Democrats overtook Right-Liberals as the second strongest segment of support. There was an aberrant dip at the 2019 European elections when the Conservatives came fifth, before recovering very strongly by the time of the 2019 general election.

The party picked up significant extra support from the Traditional Left, only 16% of which backed the Conservatives in 2016, but this rose to 38% in 2017 and 43% in 2019. Boris Johnson won an increase in support among the large Mainstream group. Support from Right-Liberals, who largely backed Remain, fell from 51% to 45%, but these losses were offset by gains elsewhere. Losses among Right-Liberals were mitigated by opposition to Jeremy Corbyn, despite the Conservatives' stance on Brexit.

**Figure 76: Conservative vote intention by segment, 2016-19**

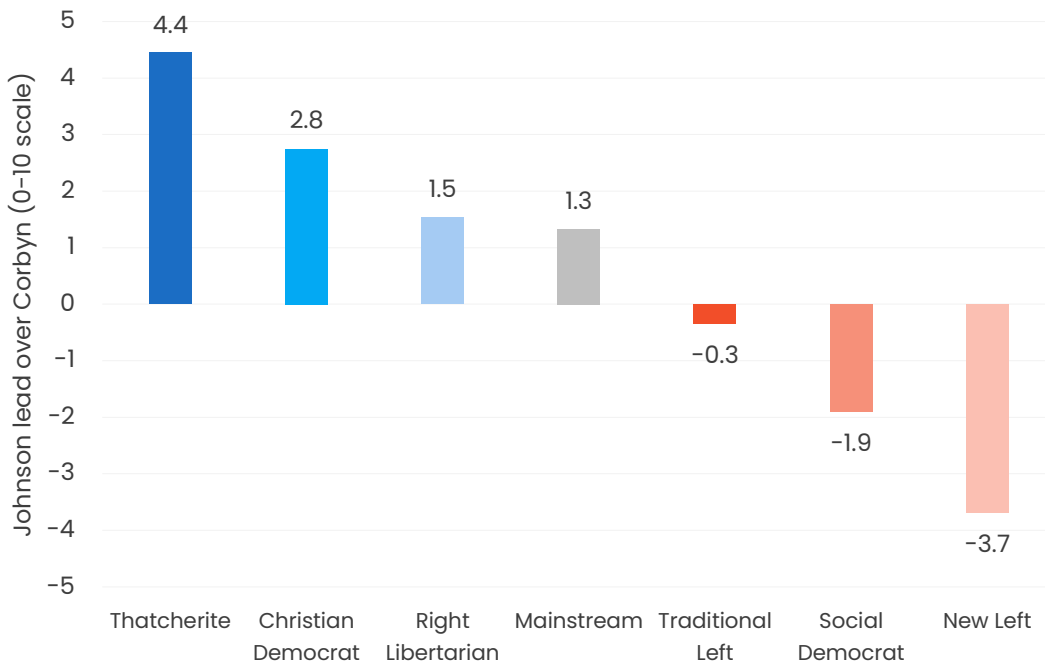
Source: British Election Study; British Social Attitudes Survey



Even with the Right-Liberals, Johnson had an average lead over Corbyn of 1.5 points. Jeff, a car park attendant from Bodmin who voted for the Liberal Democrats in 2024 shared his views on the 2019 election and said, “They (the Conservatives) were the best option. Jeremy Corbyn was off-putting while Johnson was bubbly and convincing.”

**Figure 77: Boris Johnson net approval over Jeremy Corbyn by segment, 2019 election**

Source: British Election Study, Wave 9, 2014-23



### The shape of the 2019 Conservative coalition

The 2019 coalition brought together traditional Conservative supporters from the Thatcherite, Christian Democrat and Right-Liberal segments of the electorate but made significant inroads into the Traditional Left and Mainstream voters. This gave it a spread of support across geographical regions and socio-economic groups that would produce an 80-seat majority.

The most important “glue” that bound these groups together was net support for Leave on Brexit, with the exception of Right-Liberals. In the end, the party was able to minimise its losses with this traditionally Conservative segment while gaining new voters among non-Conservative Leavers.

Johnson’s 2019 manifesto appealed to a broad coalition of voters across the segments. In addition to the pledge on Brexit, it included promises of increased state intervention to recruit more nurses, build more hospitals and spend public money

“levelling up” left-behind parts of the country. This appealed to the centrist and centre-left economic instincts of the Mainstream, Christian Democrats and the Traditional Left. The party also promised to control and reduce immigration and cut crime, appealing to the socially and culturally conservative instincts of Thatcherites, Christian Democrats and the Traditional Left.

### Creaking foundations - the alienation of Right-Liberals

Retained support among Right-Liberals, including in Remain-backing, affluent constituencies in the South of England, owed much to this group’s dislike of Jeremy Corbyn. However, following his departure as Leader of the Labour party the main reason for this group’s continued Conservative support disappeared.

Right-Liberals had much less in common with the policy platform built by the party under Johnson. The seeds of coalition fracture had already begun by 2019, with this group feeling the Conservative party no longer represented their economically right-wing and socially liberal values. At the same time, the party’s ability to retain its new coalition would depend heavily on its ability to keep its pledges, especially to non-traditional Conservatives who had “leant” the party their vote.

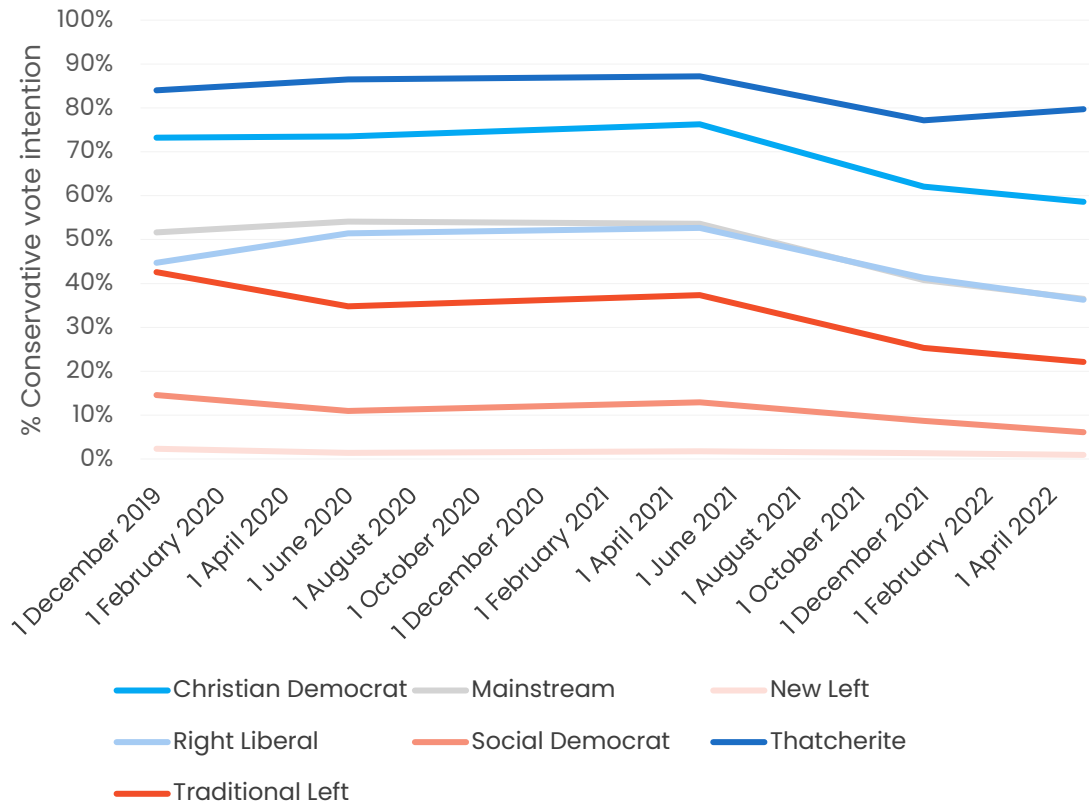
### The coalition falls apart - the pandemic to the 2024 election

The Johnson Government was disrupted almost immediately after delivering EU exit on 31 January 2020 by the arrival of the Covid-19 pandemic. This fundamentally thwarted the government’s ability to deliver on its core domestic promises, given the scale of the economic and public health intervention that would be required by the Covid response. But there was also much governing chaos – including an ever changing cast of ministers and Downing Street staff.

Initially, support for the government after Brexit and at the beginning of the pandemic was high. Support remained stable or even increased among Christian Democrats (73% to 76%) and Right-Liberals (45% - 53%).

**Figure 78: Conservative vote intention by segment, 2019–22**

Source: British Election Study Internet Panel, Onward-Focal foundational poll

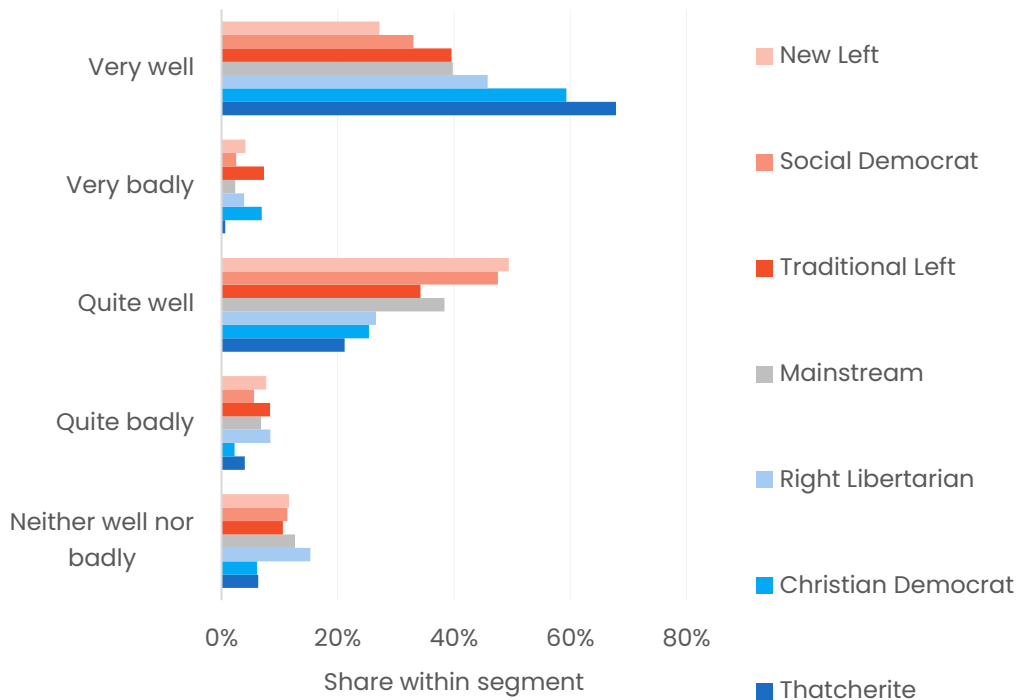


The 2021 vaccine rollout was popular across all segments - even those historically hostile to the Tories. In the British Election Study of May 2022, when asked how they thought the government was handling the vaccine rollout, even the segment with the lowest average score - the New Left - saw 76% thinking the government handled it either “quite well” or “very well”.

Support was high across the board. It was highest with Christian Democrats and Thatcherites (traditional Tory supporters), but was also high with the other parts of the 2019 coalition - Right-Liberals, the Traditional Left and the Mainstream. Nigel, who works in the care industry in Bodmin said “*The Conservatives got us through Covid, an unprecedented event. And they deserve credit for the vaccines, what an amazing feat to produce the vaccines.*”

**Figure 79: Views of the Johnson Government’s handling of the vaccine rollout, by segment, May 2021**

Source: British Election Study, Wave 21, 2014-23



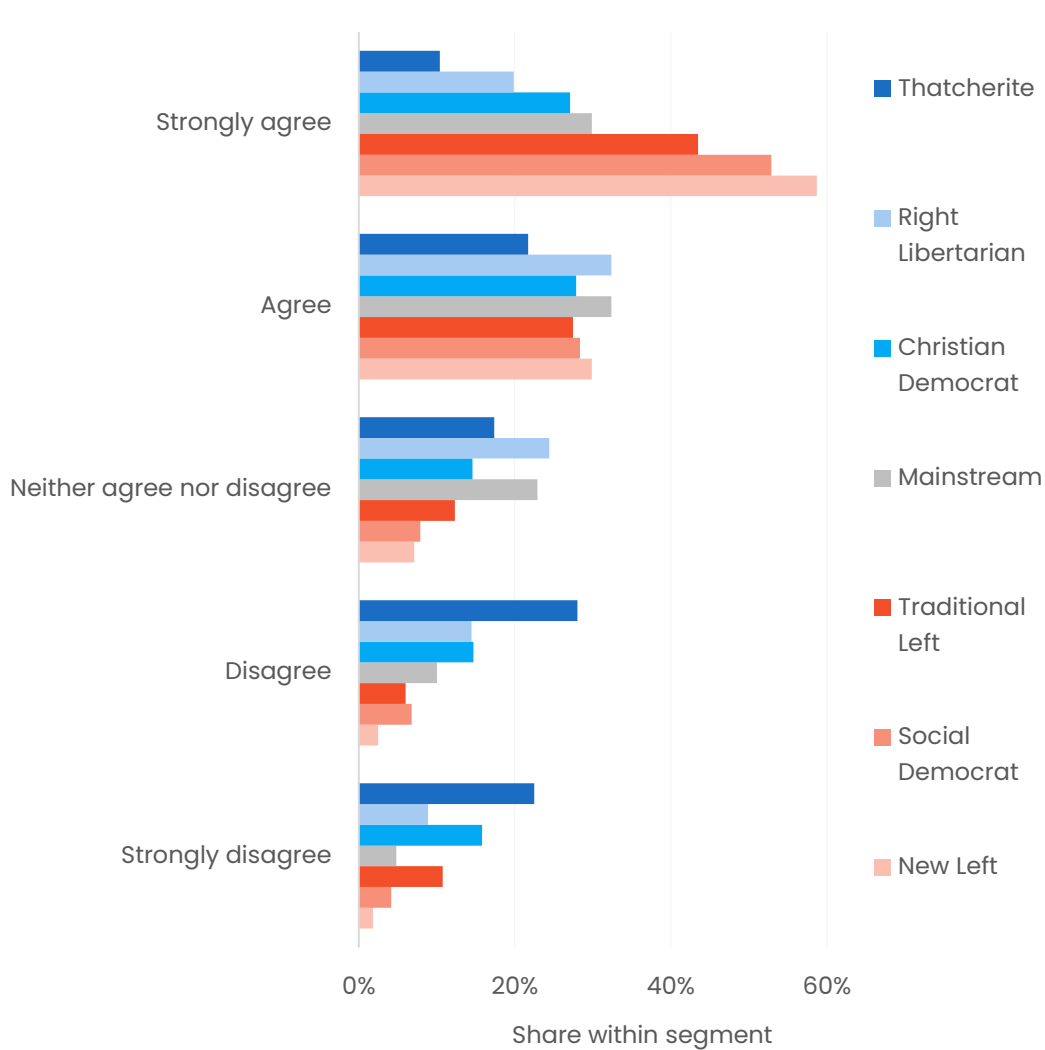
### Partygate ended the pandemic “boost”

This widespread support for the Johnson Government was short-lived. After the completion of the principal vaccine rollout and the end of lockdowns, the political focus shifted. The first major blow to the Government came from the “Partygate” revelations towards the end of 2021.

When asked whether the lockdown-breaking parties in Downing Street made them angry, only the Thatcherite group was relatively unconcerned with just 10% saying they “strongly agree”. All other segments responded with high levels of anger.

**Figure 80: Views on Partygate, by segment, May 2021**

Source: British Election Study, Wave 21, 2014-23



Following the “Partygate” revelations about pandemic rule breaking at the heart of the Johnson government, the Conservatives experienced a decline of support across almost all voter segments. Christian Democrat support fell from 76% to 59% between May 2021 and May 2022, and Traditional Left support fell from 37% to 22%. Only the Thatcherite group stayed relatively stable.

The ongoing chaos surrounding the Johnson Government – including the Owen Paterson controversy over corruption, PPE procurement scandals, the June 2022 no confidence vote and ultimately the Chris Pincher scandal – continued to feed a decline in support until his resignation announcement in July 2022.

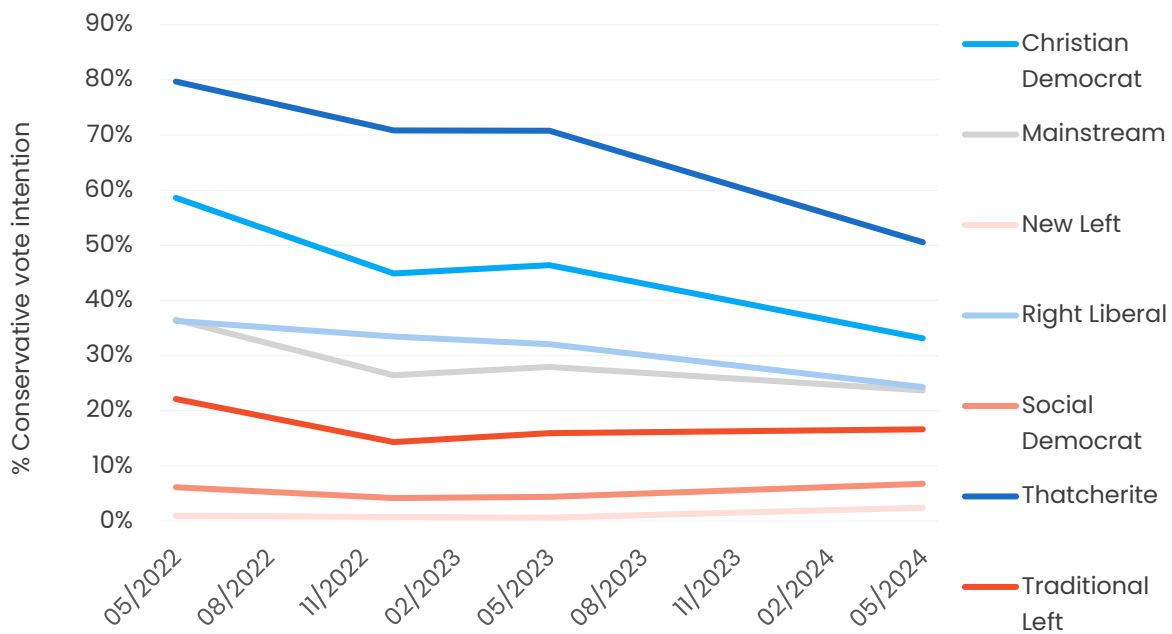
## A blow upon a bruise – the short government of Liz Truss

Despite this decline in support, voting intention for the Conservatives was not far behind Labour when Liz Truss entered Downing Street. The party was on 31% in August 2022 according to YouGov, but Labour was only on 39%. This suggested at the time that with a new leader less mired in scandal, the poll deficit of eight points could be recovered.

What transpired, however, turned a salvageable situation into an unsalvageable one.

### Figure 81: Conservative vote intention by segment, May 2022–24

Source: British Election Study Internet Panel, Onward-Focal foundational poll, 10th–28th May, 2024



The major decline in Conservative support occurred following Liz Truss's Mini-budget in Autumn 2022. This incident severely damaged the party's reputation for economic competence. By the end of 2022, the broad coalition that gave the party its 2019 majority had largely disintegrated.

Mainstream voter support collapsed from 52% in 2019 to 37% in May 2022, but declined further to 26% in December 2022. Thatcherite support fell from 80% to 71%, and Christian Democrat support fell from 73% at the 2019 election to just 45% by the end of 2022. Traditional Left support – Boris Johnson's new Conservative voters – plummeted from 43% support in 2019 to 22% prior to his resignation, and then to just 14% following the Truss government.

Voter disenfranchisement with the Conservative party was clearly borne out in the focus groups.

### **Box 3: Focus group quotes on Conservative leadership**

Rob, a warehouse manager from Cannock Chase: *“For me it was when it was one leader out, one leader in, one leader out, one leader in. Scandal here, scandal there.”*

Julie, a first aider from Hartlepool: *“The mask has slipped now. We see that their values aren’t in place at all. There’s a lack of leadership.”*

Stuart, a consultant from Tunbridge Wells *“it has been a merry go-round of leaders.”*

Nick, a support worker from Bodmin - *“There’s too many times like the partygate things, the Matt Hancock thing. There’s at least four or five examples where there’s just extreme shambles. And each time they’re like ‘oh no we’ll change, we’ll do this, we’ll do this’, and they just didn’t. Then it went quiet for a while and then something else happened. It just repeated.”*

Matt, an ambulance driver from Bodmin said, *“They keep changing leaders ... it’s a bit like a shambles. You wouldn’t trust a company that keeps changing leadership all the time.”*

The period following Rishi Sunak taking over as Prime Minister did not improve support for the party. Although the government was stabilised, its inability to deliver on the key 2019 campaign promises meant any good will for the new Prime Minister did not translate into electoral success. During Sunak’s time in office, support for the Conservatives continued to decline.

Jeff, a car park attendant from Bodmin said, *“As a person he (Rishi) probably wants to do the best for the country, but he’s with the Conservative Party and he’s got a lot to carry from what’s behind him ... deep down he wants to do good, but he’s in the wrong party I think.”*

Jess, an NHS housekeeper from Rother Valley said, *“I remember Rishi’s statement on furlough and I actually felt a bit proud that I’d voted for him because he’s come out and he’s sorting people out, but after all that stuff behind people’s back, that totally changed my viewpoint.”*

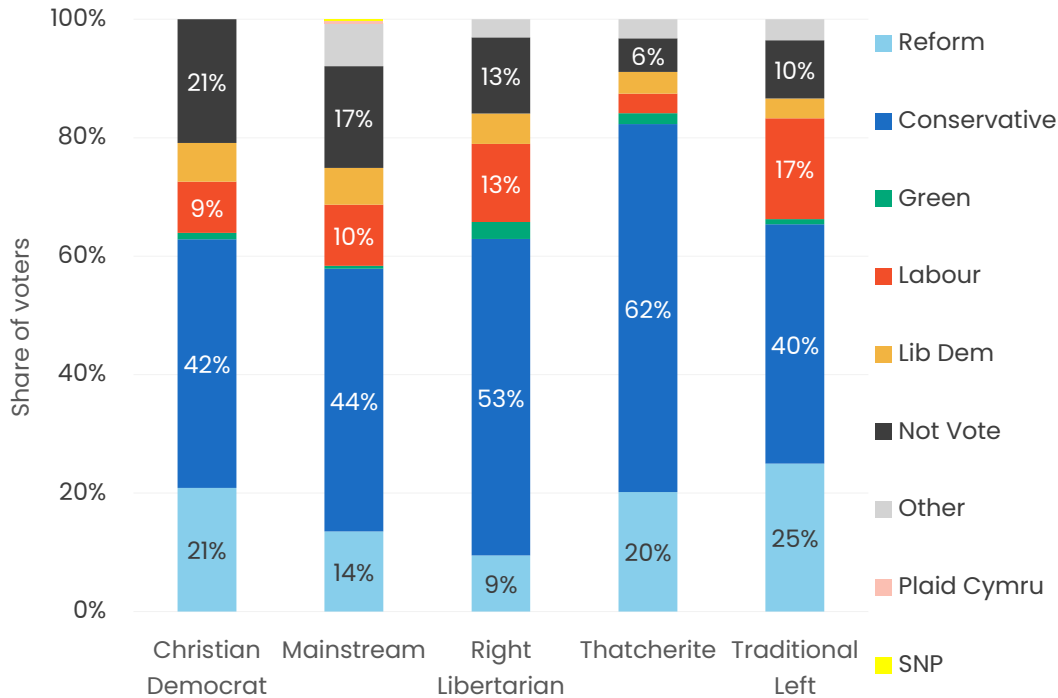
## Where did the 2019 coalition go?

Conservative defectors did not all go the same way in 2024. The party managed to retain just 44% of Mainstream voters who backed them in 2019. Thatcherites, Christian Democrats and the Traditional Left split, with Reform the most popular destination. 17% of the Traditional Left 2019 Conservatives went to Labour, indicating that “vote lending” to the Tories over Brexit had ended. Thatcherites had the highest retention rate (62%), but there were still highly damaging levels of defection for this previously solid group.

Some 2019 supporters simply did not vote again, including 21% of Christian Democrats and 17% of Mainstream voters.

**Figure 82: 2024 vote among 2019 Conservative voters, by segment**

Source: Onward-Focal foundational poll, 10th - 28th May, 2024



# The route back



The wholesale collapse of the Conservative Party's 2019 voting coalition means that a return to a much higher seat share – let alone an overall majority – will be difficult and arduous. The party must do several things to rebuild, and it cannot simply pursue one type of lost voter. Instead it must seek to rebuild a base of support across several lost groups, starting with those most likely to consider voting Conservative again, and those who already hold some disaffection towards the Labour Party.

To forge a route back to power, the Conservative Party needs to focus on fixing the party's brand, while defining a new path on three policy priorities: immigration, the NHS and growing the economy. And above all, it needs to focus on winning back the super demographics, with a strategy that wins back Liberal Democrat and Reform defectors at the same time.

## **Leadership priority: fixing the Conservative brand and defining the relationship with Reform**

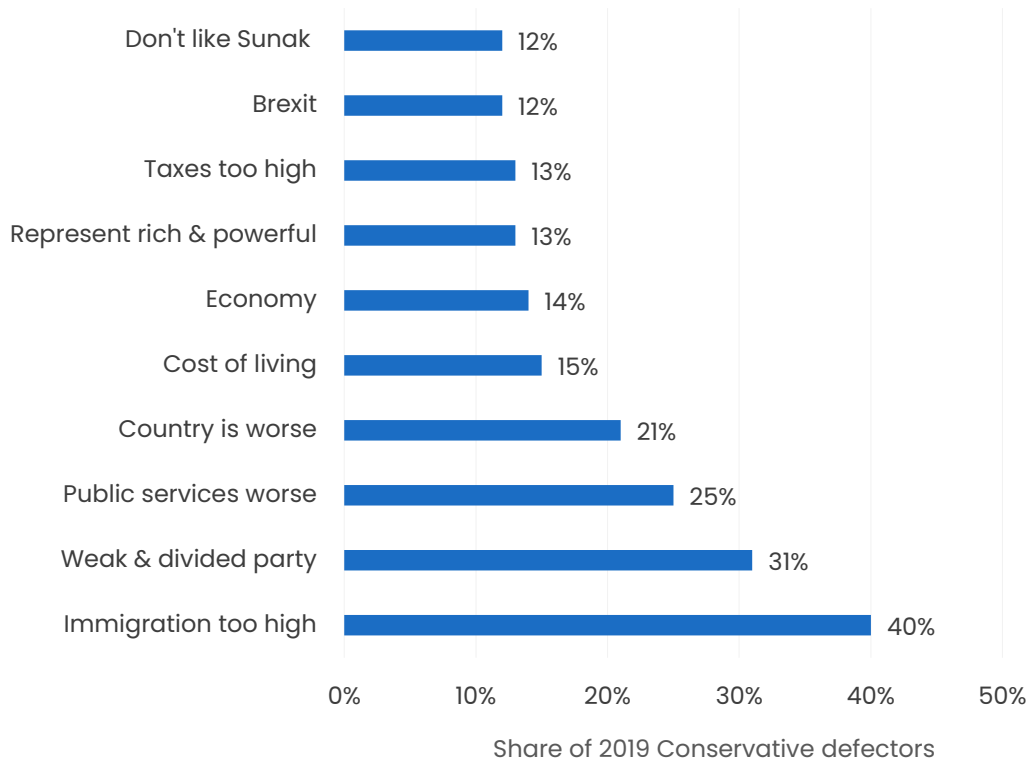
A baptism of fire awaits the new Conservative leader. Choices on immigration, the NHS, and the optimal level of personal taxes and public spending will decide whether the Conservatives are able to make a route back to power over the next five years. But on the issues that matter most to Conservative defectors, voters do not trust the Conservatives to deliver.

### **1. Fixing the Conservative brand**

Recovering trust with voters will be fundamental to rebuilding the Conservative brand. To achieve this, the party must address the most important barriers to voting Conservative. For 2019 Conservative defectors the five most important barriers are immigration being too high, the party being weak and divided, declining quality of public services, a feeling that the country is worse and the rising cost of living. It will need clear answers and messages on all these issues in Opposition, and inspire confidence that it can address voters' stated priorities.

### Figure 83: Barriers to voting Conservative at the next election among 2019 defectors

Source: Onward-Focal foundational poll, 10th - 28th May, 2024



Given voter responses regarding where the party has gone wrong, there are four key values the Party needs to demonstrate in Opposition.

1. **Stability and unity.** The fact that the party is seen as weak and divided is the second biggest barrier to voting Conservative again among those who backed the party in 2019. This would also help to address the sense of chaos Labour was able to tap into, and which came to dominate voter perceptions of what the 2024 election was about.
2. **Competence and trust in delivery.** The perception that the party had failed to deliver on its major 2019 manifesto pledges- most notably on immigration - was a major challenge for the party in 2024. Campaign messages and political pledges did not cut through because nothing the government said was trusted by voters.

Reversing this reputational damage will be challenging from the opposition benches. But voters must be convinced that future Conservative policy

pledges will happen if the party is elected and that it will manage the economy competently. Competence can be displayed through strong leadership, clear messaging, a new fresh frontbench team promoting new coherent ideas. The recovery of local figures and Conservative presence in devolved administrations – such as Ben Houchen in Tees Valley, will be critical as it is difficult to demonstrate governing capability in opposition. The party infrastructure and ecosystem and literal mechanics of opposition must look like the Conservatives can control and deliver if they are ever given the levers of power again

3. **Integrity.** Chapters 2 and 3 – The Campaign and The Record – show that the Conservative party came to be seen as self-interested, dishonest and unethical - which are strongly linked to the lack of capability and ineffectiveness in a vicious cycle. The party's reputation never recovered after Partygate and this damage was compounded by incidents like the Chris Pincher affair and Gamblegate. Higher standards of conduct by elected politicians and staff will be essential. Labour conduct so far in office will likely only increase voter concerns about corruption and probity for all politicians.
4. **Picking the right priorities.** The evidence is clear from *Breaking Blue* that a majority of voters hold conservative attitudes towards issues such as immigration and crime while also favouring investment in the NHS and prioritising public services. This presents a difficult tension for the party, and it will need to make tough decisions on both policy and messaging regarding the level of tax, pressures on public spending and the size of the state, as well as making the case that public service performance matters more than funding. It will need to pursue honesty about the trade-off between tax cuts and higher spending in a society with an ageing population. And it will need to dispel the perception that it is the party of the rich. It will also need to herald the power and success of localism.

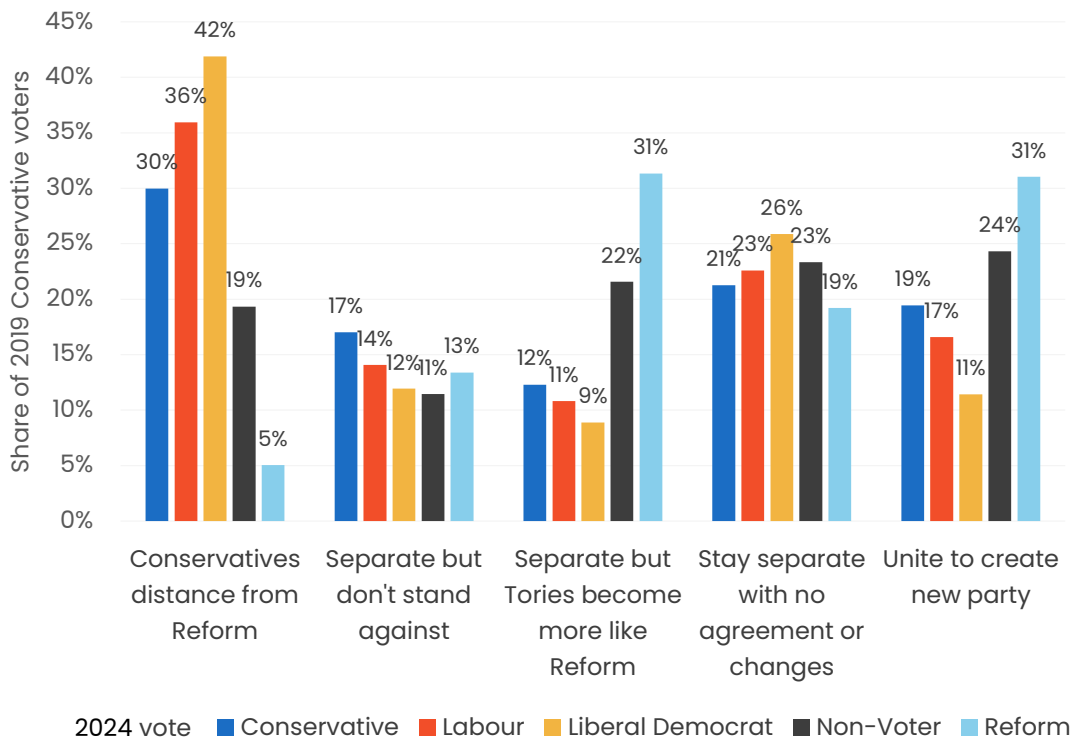
But the Conservative Party's failure to use its time in government to tell a clear narrative echoing a more classical conservative pitch - about the effectiveness of reducing state size, expanding the capacity of the state and delivering lower taxes means it is unsurprising that public opinion has not structurally shifted on these issues. The public opinion 'bridge' allowing the Conservatives to win in the future, is an authentic, dynamic and positive Conservative platform - one that clearly links supply side reform and the importance of growing prosperity to helping the poorest not just the rich. The Conservatives must never again not be considered the "first party" of enterprise, wealth creation, economic dynamism, building, and helping people get on in life.

## 2. Deal with issues behind the rise of Reform – not the party

While winning back Reform defectors is key for future Conservative electoral prospects, a deal with the party would be very divisive. Less than a third (31%) of Reform defectors want the parties to unite, but nearly half (42%) of Liberal Democrat defectors and over a third (36%) of Labour defectors want the Tories to distance themselves from Reform.

**Figure 84: Preferred relationship between the Conservative Party and Reform among 2019 Conservative voters, by their 2024 vote**

Source: Onward-Focal foundational poll, 10th - 28th May, 2024



## Who is the most popular choice of Leader?

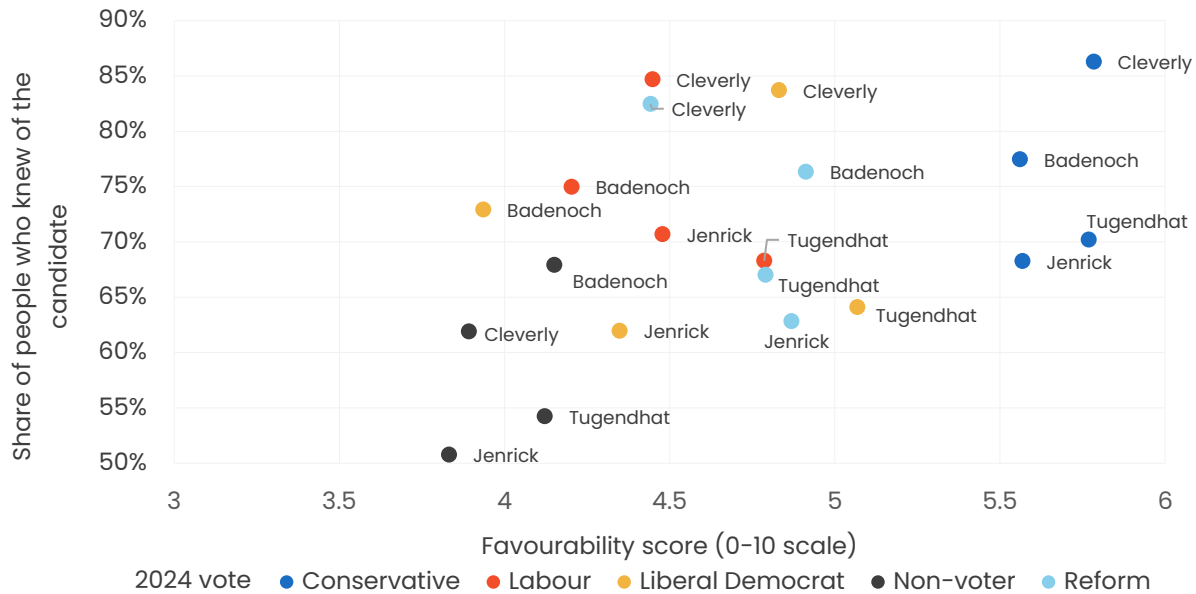
Out of the final four contenders in the 2024 leadership contest, there is no candidate who garners significantly higher levels of public recognition or support among the 2019 voting coalition: .

- **James Cleverly** is the most well-known candidate among all 2019 Conservatives and right-leaning voter segments. He is most popular among 2024 Conservative voters, but less liked than at least one other candidate among all defectors.

- **Kemi Badenoch** is less well known than James Cleverly but better known compared to other candidates. She is the most divisive candidate for the 2019 coalition. Of all defector groups, she appeals most to the Reform defectors but least to Liberal Democrat defectors.
- **Tom Tugendhat** sees similar likeability scores across Labour, Reform, and Liberal Democrat defectors. He is also the most liked candidate across all voter segments barring the Thatcherites. But his likeability is undermined by very low levels of awareness across all defectors. In each defector group, he remains one of their least well known candidates.
- **Robert Jenrick** is the least well known candidate across all groups except the Labour defectors. Reform defectors and 2024 Conservatives like Jenrick more than Labour and Liberal Democrat defectors.
- Non-voters have low levels of awareness and disparate views of the leadership candidates.

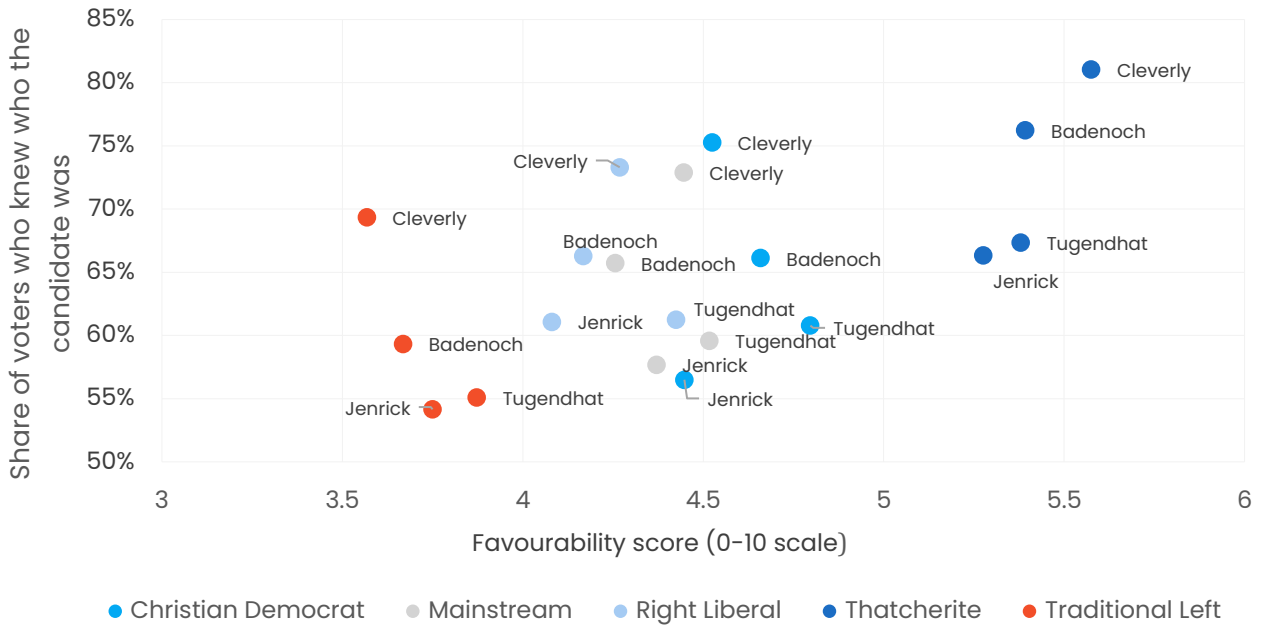
**Figure 85: Share of 2019 Conservative voters who knew who the candidate was versus average favourability score, by 2024 vote**

Source: Onward-Focal post-election poll



**Figure 86: Share of 2019 Conservative voters who knew who the candidate was versus average favourability score, by voter segment**

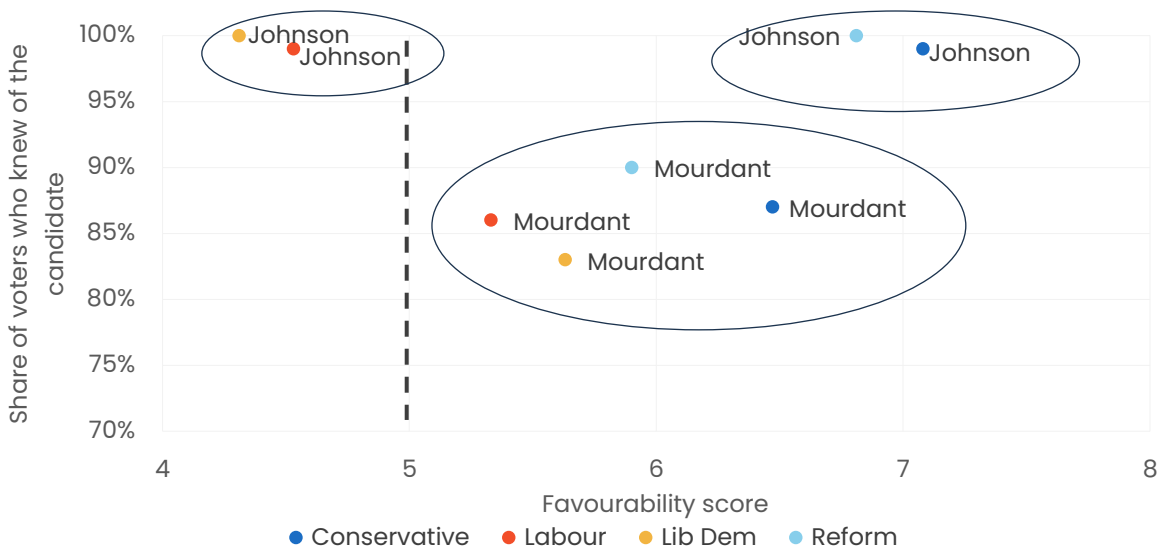
Source: Onward-Focal post-election poll



Other candidate prospects not in the contest would also have struggled to unite the 2019 coalition. Not even Boris Johnson could have unified the voters at this stage in the electoral cycle. The only candidate who is both well known and well-liked by all 2019 Conservatives - Penny Mordaunt - lost her seat in July 2024.

**Figure 87: Share of 2019 Conservative voters who knew who the candidate was versus average favourability score, by defector group**

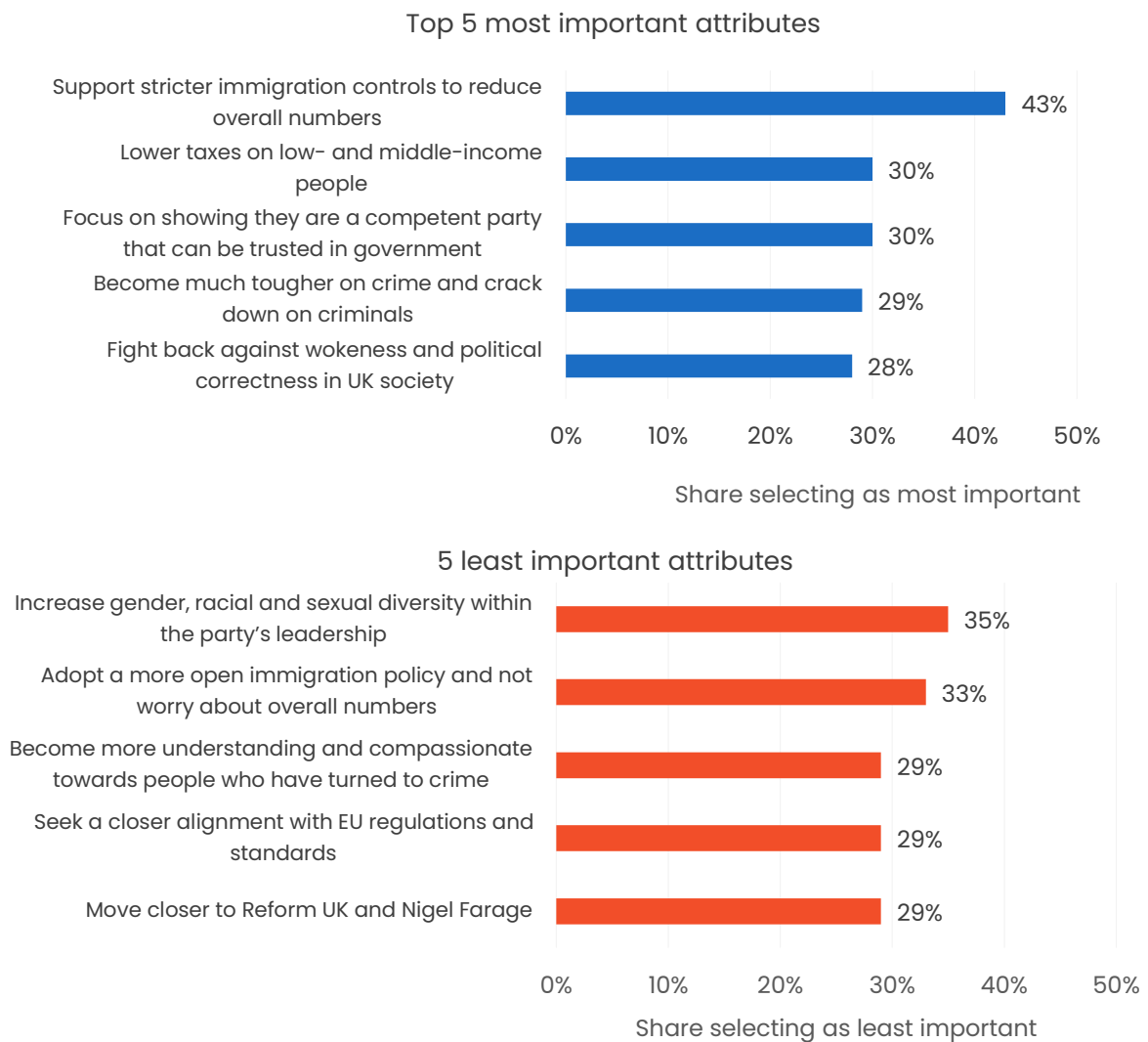
Source: Onward-Focal foundational poll



Ultimately, the Conservatives should use their initial years in Opposition to effectively define their policy priorities and rebuild trust with voters. When presented with a mix of options on policies, behaviour changes, possible relationships with other parties, and general approaches to politics,<sup>19</sup> it is clear that immigration, public services, and competence and trustworthiness are key priorities.

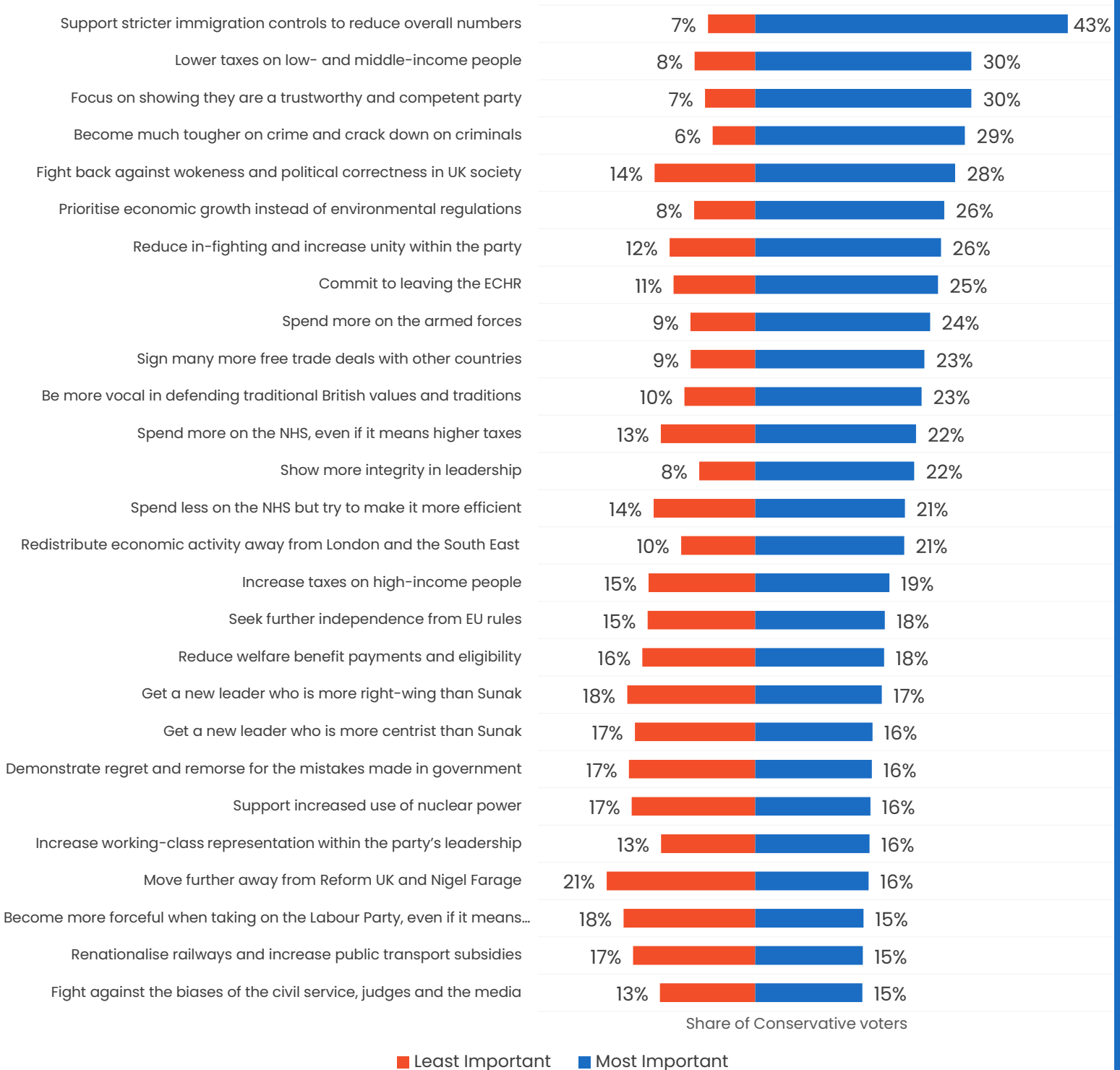
**Figure 88: Top five most and least important issues that would increase the likelihood of Conservative voters (those who voted Tory in at least one election between 2015 and 2024 ) to vote Conservative again**

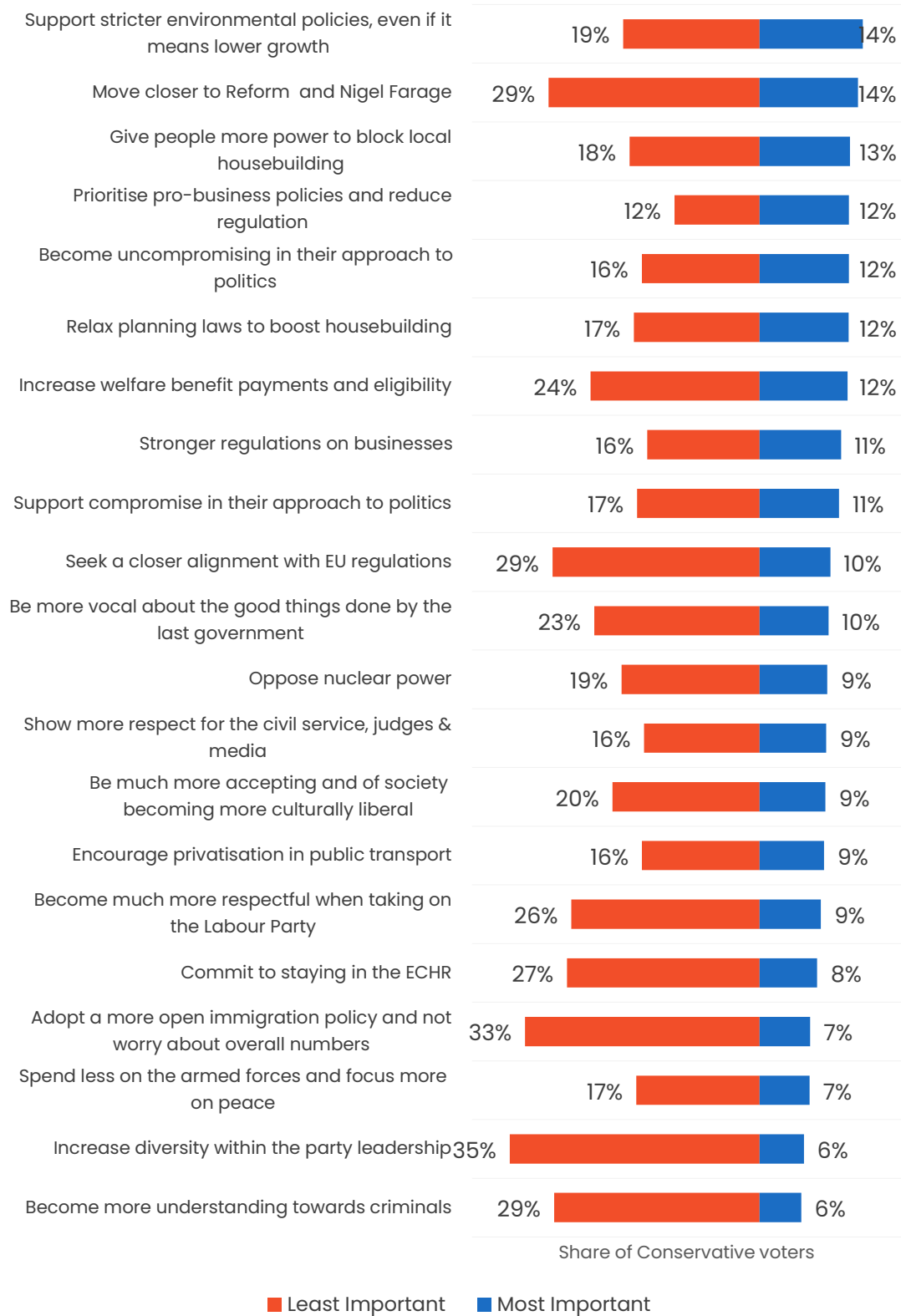
Source: Onward-Focal foundational poll



**Figure 89: Most and least important issues that would increase the likelihood of Conservative voters (those who voted Tory in at least one election between 2015 and 2024 ) to vote Conservative again**

Source: Onward-Focal foundational poll





## 2. Policy priorities

When asked what the Conservative party needs to do to make them more likely to vote for it again, reducing immigration was the top priority among all 2019 defector groups. There was also a strong preference for two conflicting policies: increased government spending on public services, and for reducing personal tax.

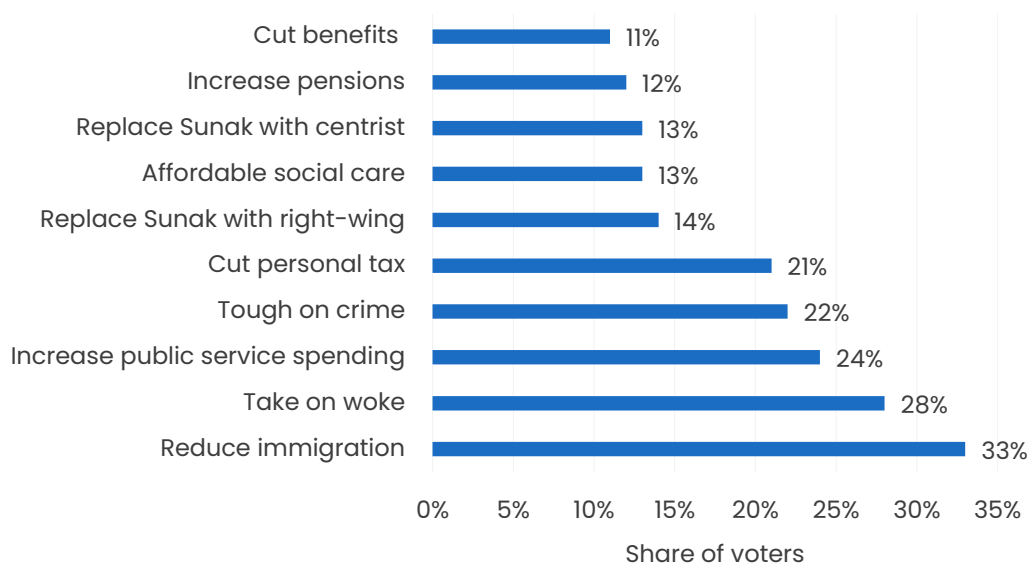
Tackling immigration was – by a wide margin – the biggest issue for Reform switchers, but was also the top issue for Liberal Democrat switchers. Increasing spending on public services was an important priority for Labour and Liberal Democrat defectors and those who did not vote. Taking on “woke” was important for Reform switchers and those who did not vote.

Analysing 2019 defectors by electoral segment, reducing immigration was the top priority for Thatcherites and Christian Democrats and the second most important for Right-Liberals, the Traditional Left and Mainstream voters. Increasing spending on public services was important for Christian Democrats, Right-Liberals and the Traditional Left.

Being tough on crime was important for Thatcherites, Right-Liberals and Christian Democrats (the standard right-wing coalition), plus the Mainstream segment. Taking on “woke” politics was seen as important by Mainstream voters, Thatcherites and Christian Democrats.

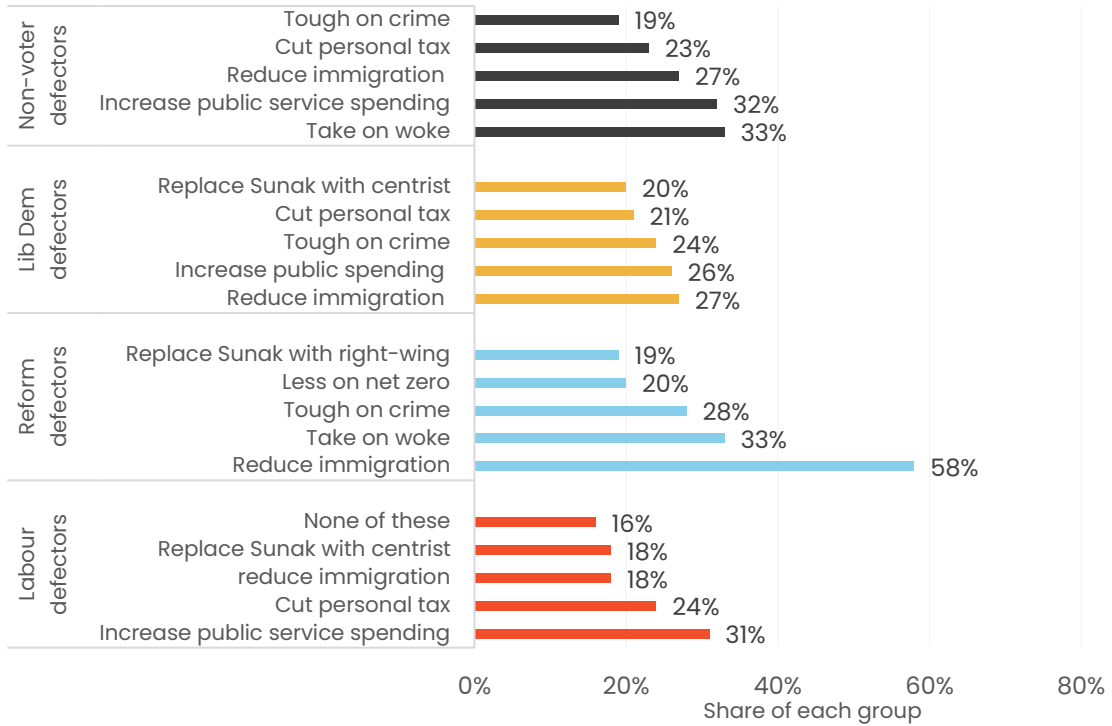
### Figure 90: What could the Conservative Party do to make 2019 Conservative defectors more likely to vote for them?

Source: Onward-Focal post-election poll, August 2<sup>nd</sup>-14<sup>th</sup>, 2024



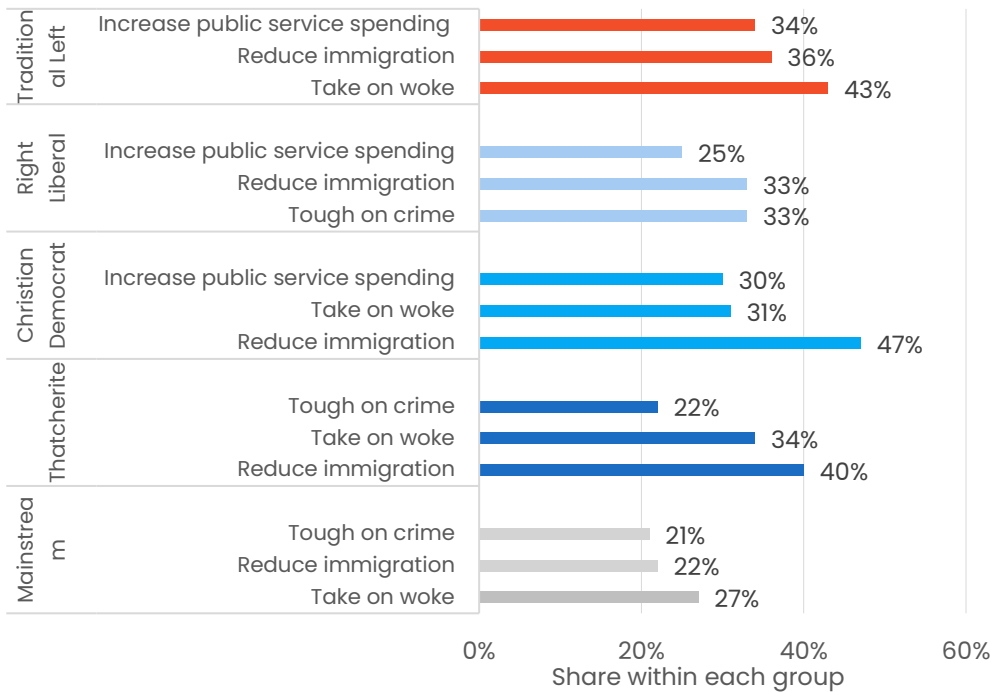
**Figure 91: What could the Conservative party do to increase the chances of voting for them again? (2019 Conservative defectors by 2024 vote)**

Source: Onward-Focal post-election poll, August 2<sup>nd</sup>-14<sup>th</sup>, 2024



**Figure 92: What could the Conservative party do to increase the chances of voting for them again? (2019 Conservative defectors by voter segment)**

Source: Onward-Focal post-election poll, August 2<sup>nd</sup>-14<sup>th</sup>, 2024

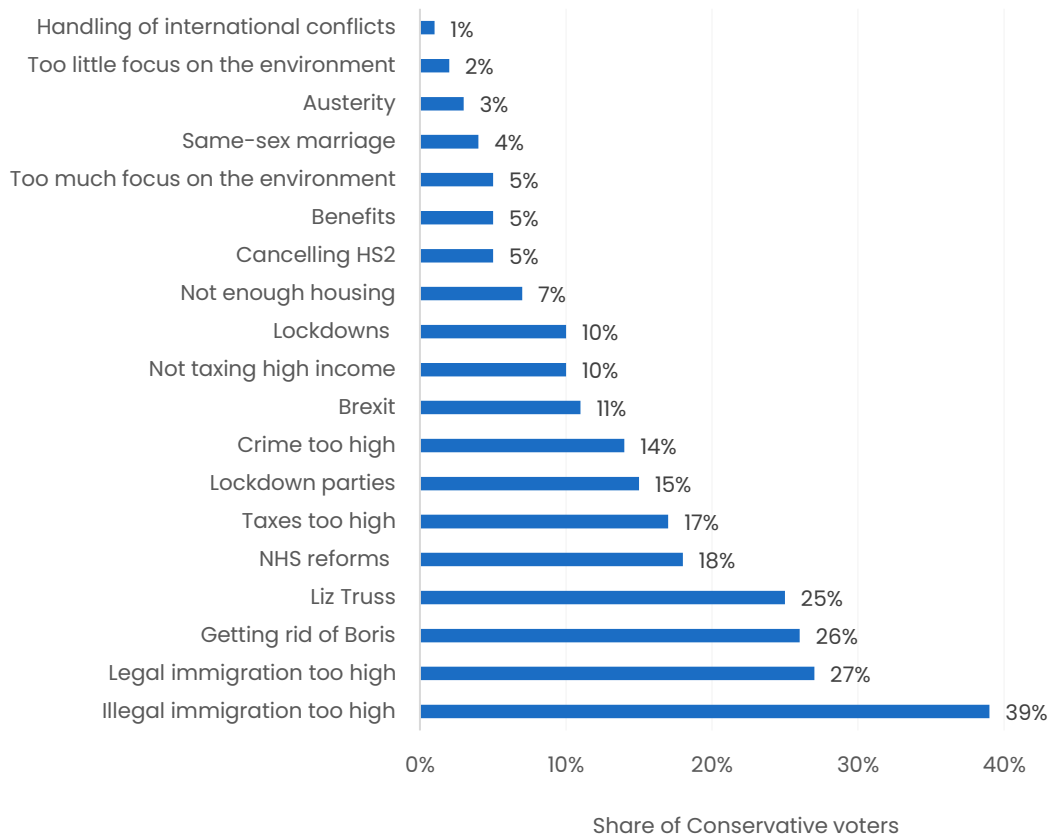


## Policy priority – Immigration

All 2019 Tory voters, regardless of the political party they defected to, want to see cuts to immigration, legal and illegal. It was the single largest Conservative failure that distanced the Conservatives from their core voters over the last decade.

**Figure 93: Biggest Conservative failures identified by those who voted Tory in all general elections between 2015 and 2019**

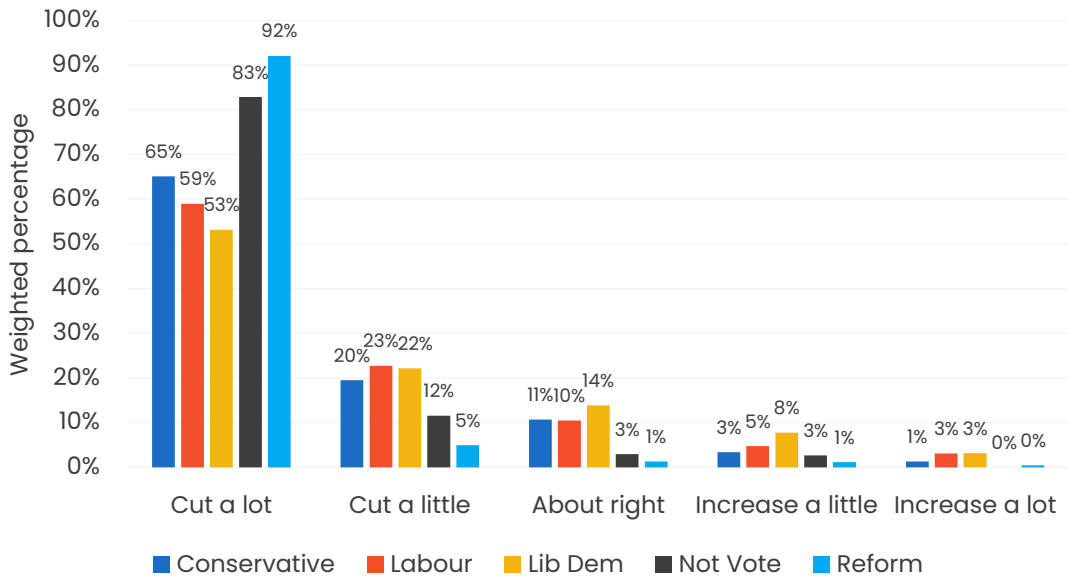
Source: Onward-Focal foundational poll



When asked how much they'd like to see migration levels change, 2019 Conservatives want to see significant cuts to immigration. This even applies to Tory-Liberal Democrat switchers, over half (53%) of whom are not liberal on immigration. 92% of Reform switchers, 83% of those who did not vote, and 65% of those who stuck with the Conservatives in 2024 also share this view.

**Figure 94: Views on immigration among 2019 Conservative voters by 2024 vote**

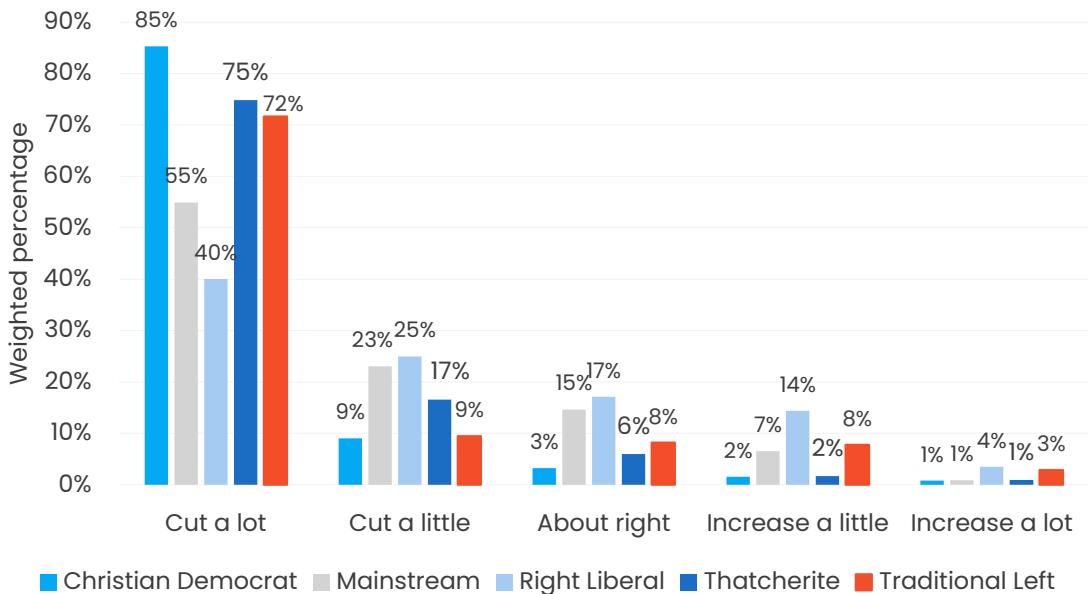
Source: Onward-Focal post-election poll



The right-leaning segments all have similar attitudes to immigration. 85% of Christian Democrats want it cut a lot, compared to 75% of Thatcherites, 72% of the Traditional Left but also 55% of Mainstream voters and 40% of Right-Liberals.

**Figure 95: Views on immigration among 2019 Conservative voters by 2024 vote**

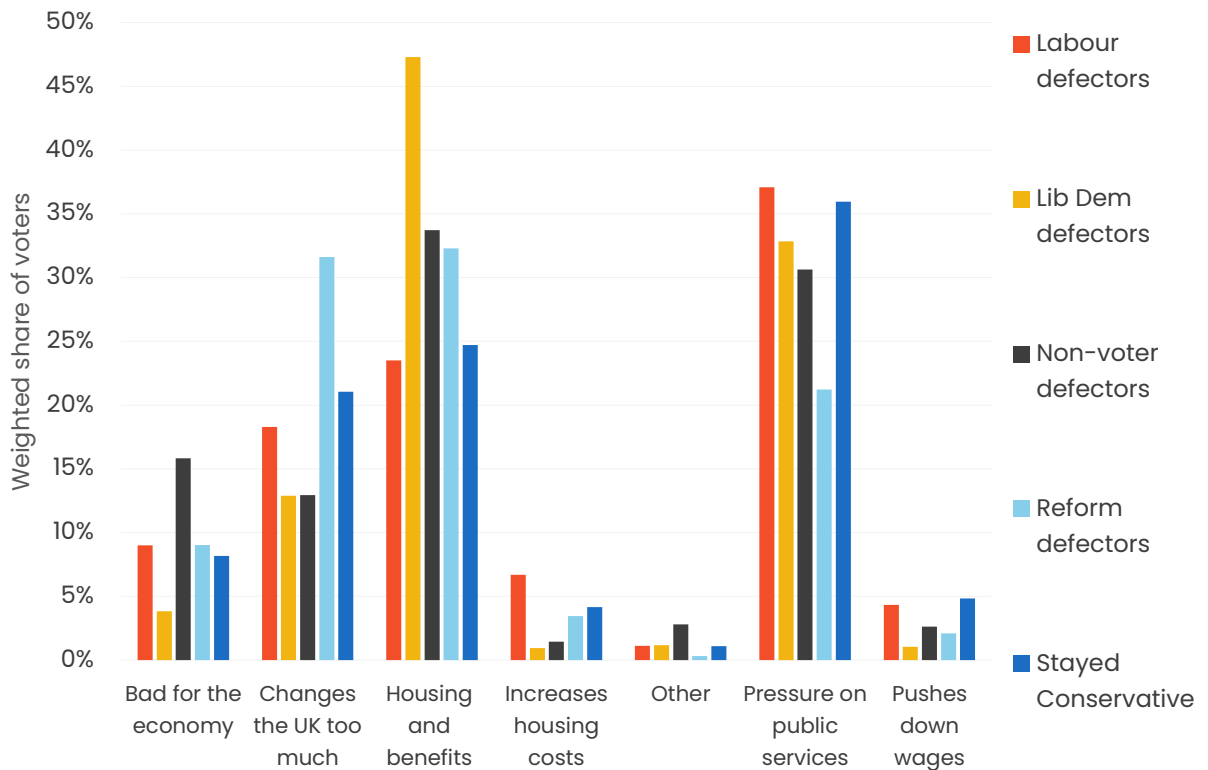
Source: Onward-Focal post-election poll



The overarching reason 2019 Tories want to see immigration cut is because they feel it is exerting greater pressure on public services that are already stretched thinly. Over a third of all 2019 Conservatives felt that the pressure on public services should be the main reason to cut immigration.

**Figure 96: Top reasons cited among 2019 Conservative voters to reduce net migration, by 2024 vote**

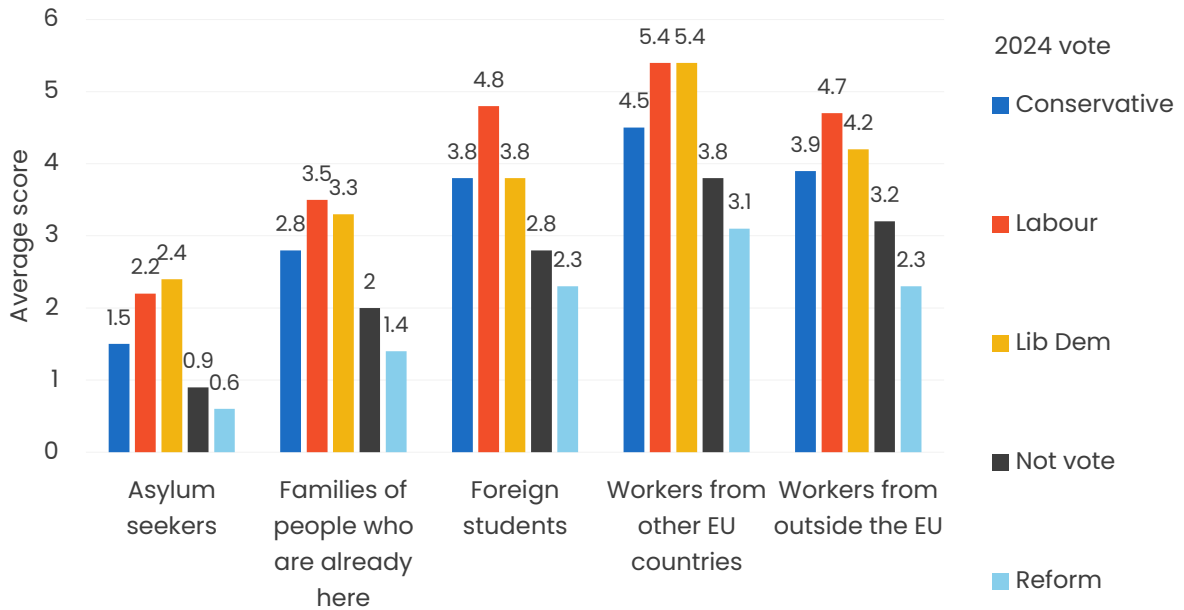
Source: Onward-Focal post-election poll



Despite wanting less immigration overall, some forms of immigration are more favourable to 2019 Conservatives. When asked about different types of immigration, they favoured workers from EU countries the most, followed by workers from non-EU nations. The data reveals a greater tolerance towards immigration when immigrants are economically active.

**Figure 97: Top reasons cited among 2019 Conservative voters to reduce net migration, by 2024 vote**

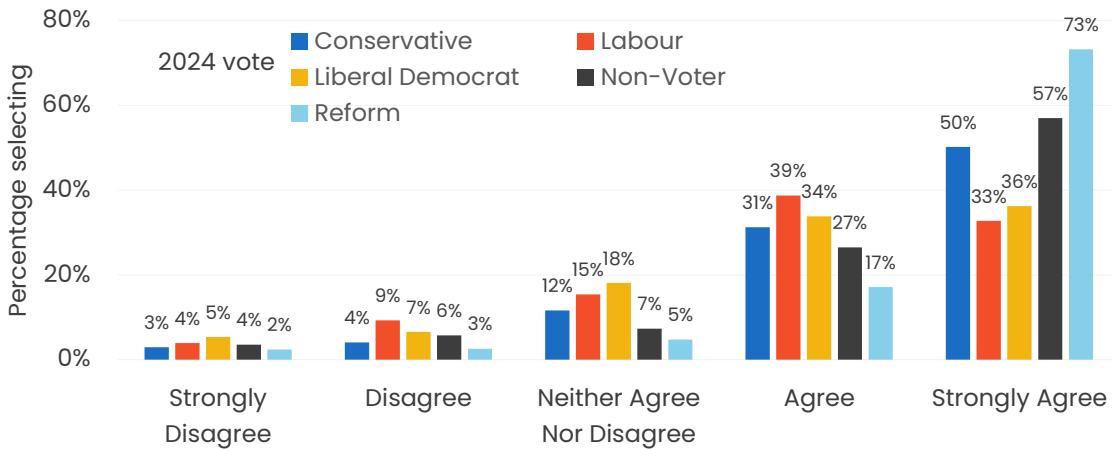
Source: British Election Study, Wave 26, May 2024



Illegal immigration is the least popular form of immigration among 2019 Conservatives. This stems from a perception across this group that asylum seekers are not actually seeking refuge, but are instead economic migrants coming to the UK to claim benefits or seek better work opportunities.

**Figure 98: Agreement with the statement “people coming on small boats across the Channel are not really refugees but mainly economic migrants who want to come here to work or claim benefits” among 2019 Conservative voters, by their 2024 vote**

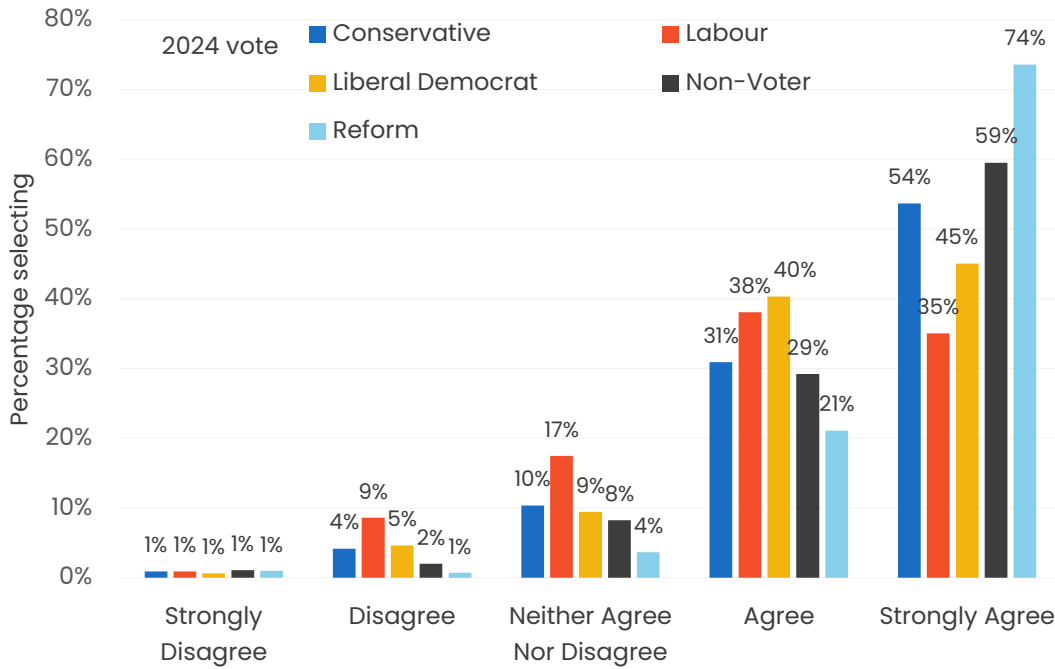
Source: British Election Study, Wave 26, May 2024



Further fuelling a preference for Britain to reduce illegal immigration is a strong consensus among 2019 Tories that the French government will not stop the small boats, shown in the figure below.

**Figure 99: Agreement with the statement “The French government will never stop the small boats coming into the UK, no matter what deal we make with them,” among 2019 Conservative voters, by their 2024 vote**

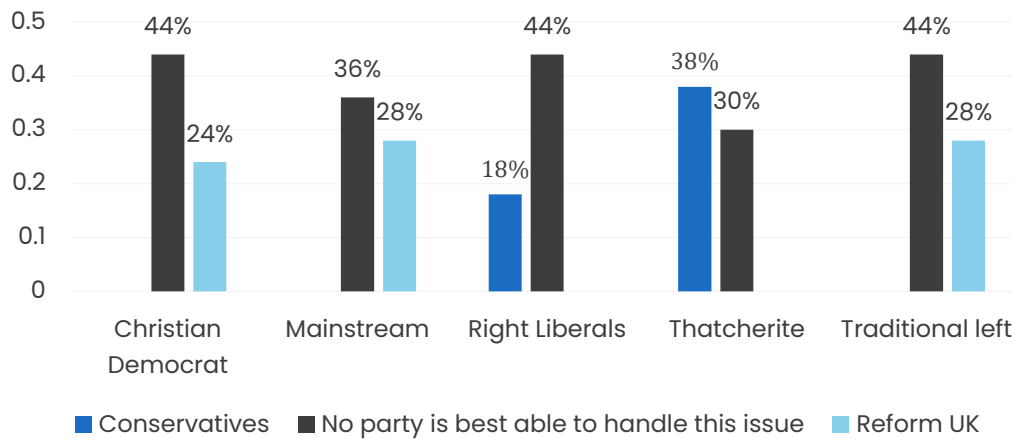
Source: Onward-Focal post election poll



Given the importance of the issue to historic Conservative voters and right-leaning segments, views of the party’s ability to handle immigration are poor. Among those who said immigration and asylum is one of the most important issues, “No party” was the most popular response to the question of which party would handle it best. Reform led the Tories among Christian Democrats, the Traditional Left and the Mainstream. Reform is therefore seen as more competent on the issue among those who prioritise it.

**Figure 100: Which party is best placed to handle immigration and asylum?  
(Respondents who said this was one of the most important issues facing the country)**

Source: Onward-Focal foundational poll



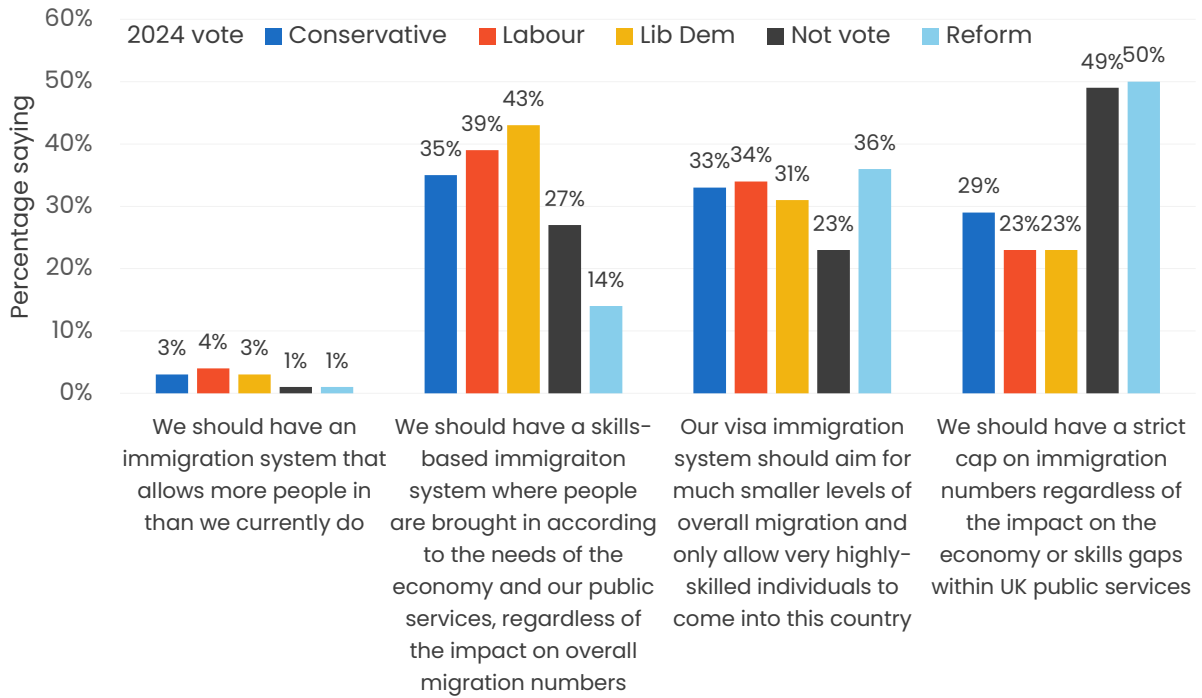
Devising a credible workable and uniting policy on immigration will be challenging. The most popular option to tackle immigration is also the most divisive among 2019 Conservative defectors. Over a third of 2019 Conservative defectors think that there should be a strict cap on immigration numbers regardless of its impact on the economy and public services. But that sentiment stems primarily from the Reform and non-voter defectors.

A skills-based immigration system is more popular among Labour and Liberal Democrat defectors, but unpopular among Reform defectors. The only option with relatively higher levels of consensus was to create an immigration system that allowed for significantly lower levels of immigration, prioritising only very high-skilled migrants. This is similar to what was promised by the Conservatives in the 2019 election, but failed to be implemented by several Conservative Prime Ministers.

Broken down by voter segments, a skills-based immigration system has the most broad-based appeal. The most crucial segment to win back, the Mainstream voter, was most in favour of a skills-based system. A strict cap on immigration numbers was divisive - favoured most by the Thatcherites, Christian Democrats, and Traditional Left, and least by the Mainstream Voter and Right-Liberals. A small immigration system overall that strongly prioritises very high-skilled immigration saw the most consensus across all voter segments.

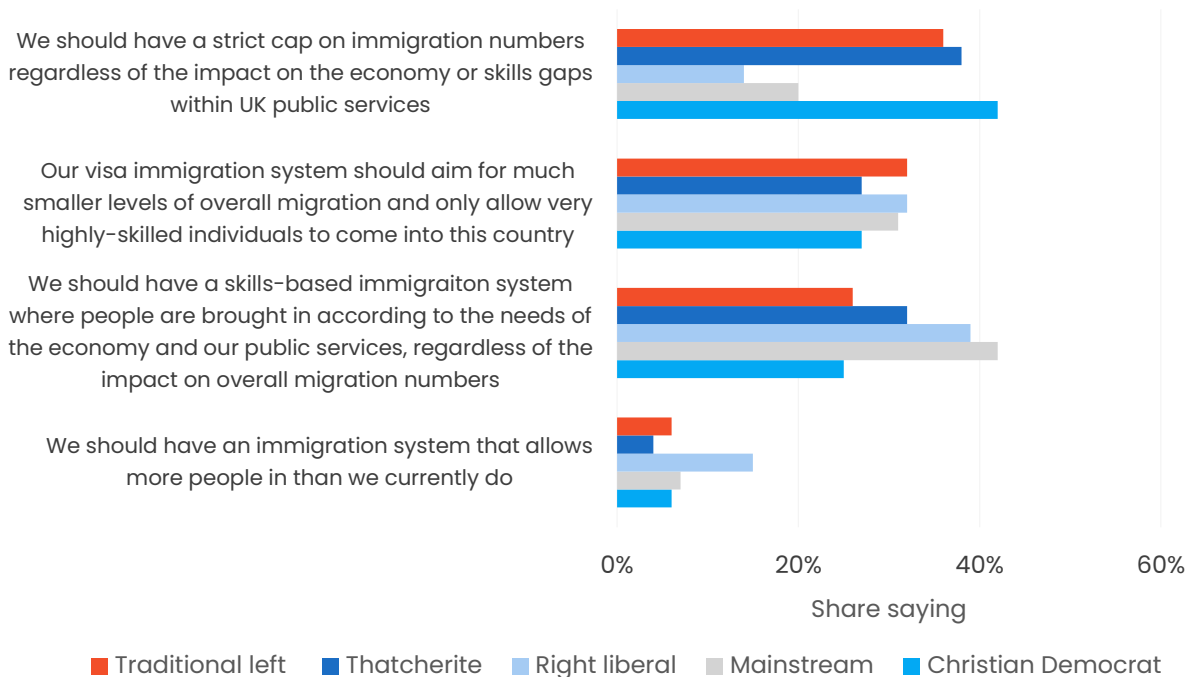
**Figure 101: Preferred immigration policies among 2019 Conservative voters by 2024 vote**

Source: Onward-Focal foundational poll



**Figure 102: Preferred immigration policies among 2019 Conservative voters by voter segment**

Source: Onward-Focal foundational poll

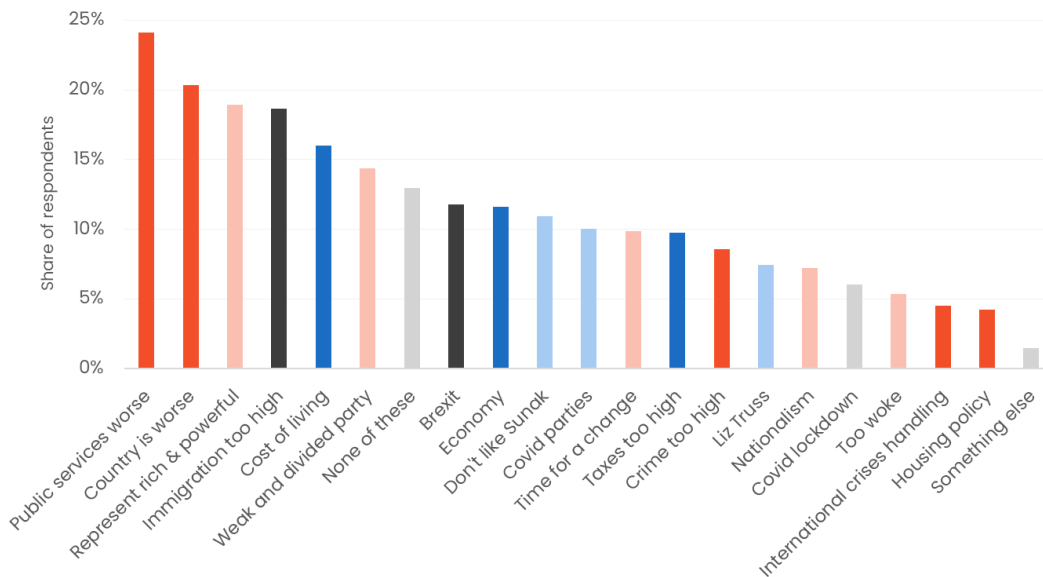


## 2. Public service spending versus tax cuts

High on the list of priorities for both Conservative defectors and 2024 Conservative voters is increased government spending on public services, namely the NHS. The two leading reasons cited across all voters for not voting Conservative at the 2024 election concerned failing public services. And increased spending on public services ranked among the top three ways in which the Conservatives could win back their 2019 voters.

**Figure 103: Barriers to voting Conservative among all voters**

Source: Onward-Focal foundational poll

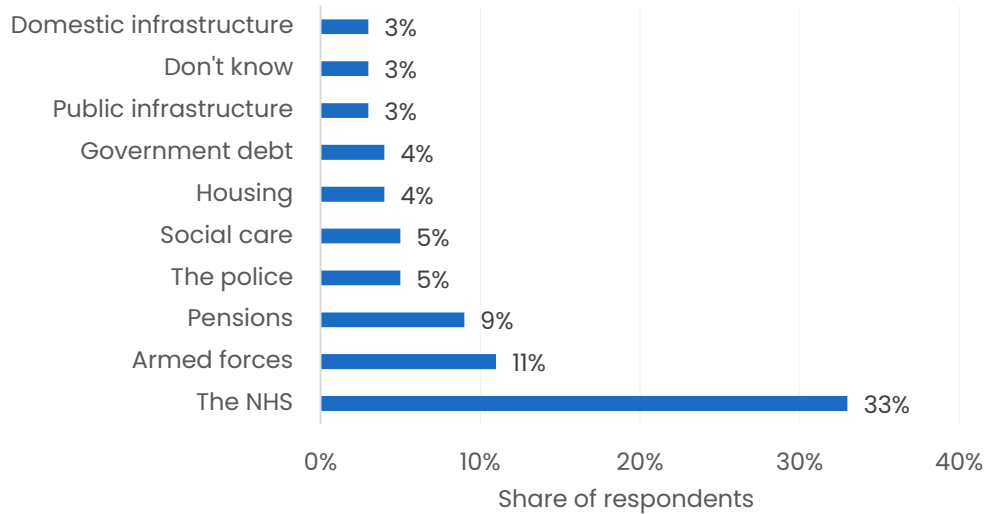


When asked which area of government spending they would support increasing, 2019 Conservative voters overwhelmingly prioritised the NHS. This was especially true of Labour defectors, 48% of which ranked it as their top issue. But 40% of Liberal Democrat defectors and 38% of non-voters also prioritised it, together with 32% of current Tories and 24% of Reform switchers.

All right-leaning electoral segments (and the Mainstream) ranked the NHS as the most important public spending priority. Over one third of all right-leaning segments said the NHS was one of the most important issues facing the country, including 40% of the Traditional Left, 39% of Christian Democrats and 39% of the Mainstream. Gaining voters' confidence that the party can be trusted to manage and improve the NHS is therefore essential for building a winning coalition across the electoral segments.

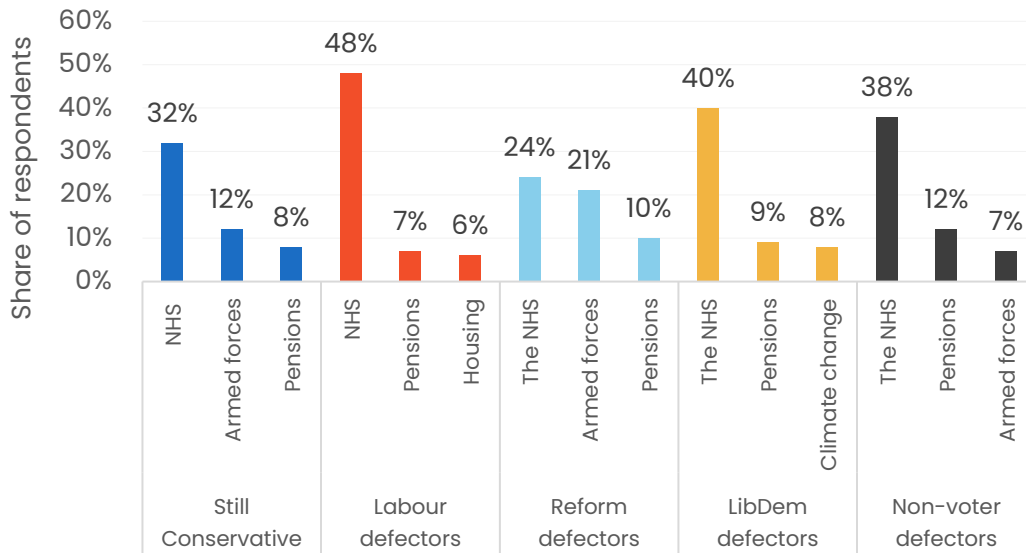
**Figure 104: What area of government spending would you be most supportive of increasing? (Among 2019 Conservative voters)**

Source: Onward-Focal foundational poll



**Figure 105: What area of government spending would you be most supportive of increasing? (Among 2019 Conservative voters, by voter segment)**

Source: Onward-Focal foundational poll



Conservative voters from the last election want to see productivity improvements to NHS staffing. They favour hiring and training more doctors and nurses in the UK and reducing the number of NHS managers. Over half of Reform and LibDem defectors placed reducing the number of NHS managers in their top three most favourable options to reform the NHS. Among Labour and non-voter defectors, training more staff within the UK was the most popular option for reform.

**Figure 106: Considering the following possible changes to the NHS, which of these would you be most in favour of? Please select up to three (2019 Conservative voters)**

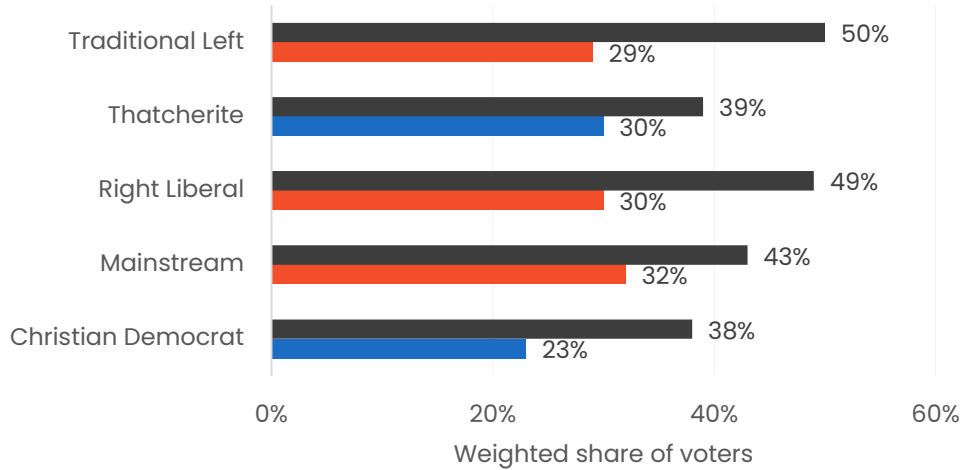
Source: Onward-Focal foundational poll



Of those who said the NHS was one of the most important issues facing the country, no electoral segment said the Conservatives were the best able to handle the health service. Given the general disillusionment over the state of the NHS, it is unsurprising that “No Party” was the most popular response. However, the Conservatives came second only with Thatcherites and Christian Democrats. Mainstream voters, the Traditional Left and Right-Liberals all said Labour would handle it better.

**Figure 107: Which party is best able to handle the NHS? (all respondents saying the NHS is one of the most important issues facing the country)**

Source: Onward-Focal foundational poll



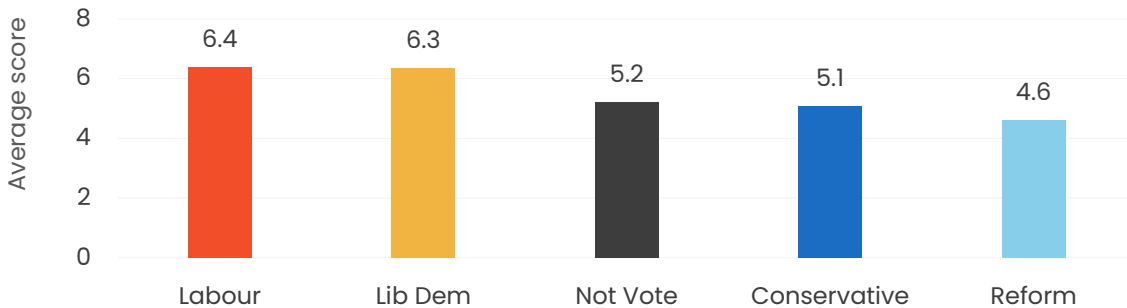
While former 2019 Tories want greater spending on public services, they also favour lower taxes, especially for low and middle-income earners. Cuts to personal tax ranked among the top five things the Conservatives could do to win back their 2019 voters, as seen in Figure 93 above. It is likely that voters see public service spending and cuts to personal taxes as disjoint choices.

When presented with the trade-offs between increased taxes and spending or reduced taxes and spending, 2019 Conservatives present a more divided stance. Other than the Reform defectors, all other 2019 Conservatives expressed a slightly more than average preference for higher taxes and greater government spending. Figure 109 below also shows that more 2019 Tories agree than disagree that they will have to pay a bit more tax to improve public services.

**Figure 108: Optimal tax and spend preferences among 2019 Conservative voters, by their 2024 vote**

Source: Onward-Focal foundational poll

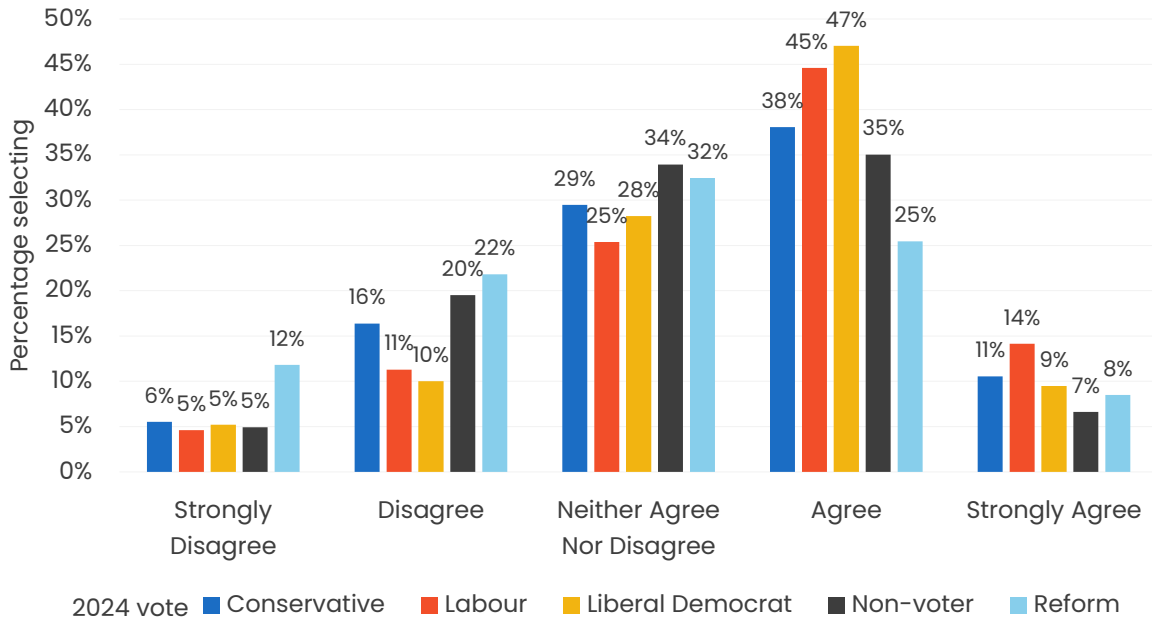
Scale: 0-10, where 0 means the government should cut taxes a lot and spend much less on health and social services, and 10 means that the government should raise taxes a lot and spend much more on health and social services



**Figure 109: 2019 Conservatives: Optimal tax and spend level on health and social care, among 2019 Conservatives, by their 2024 vote**

Source: Onward-Focal foundational poll

Scale: 0-10, where 0 means the government should cut taxes a lot and spend much less on health and social services, and 10 means that the government should raise taxes a lot and spend much more on health and social services



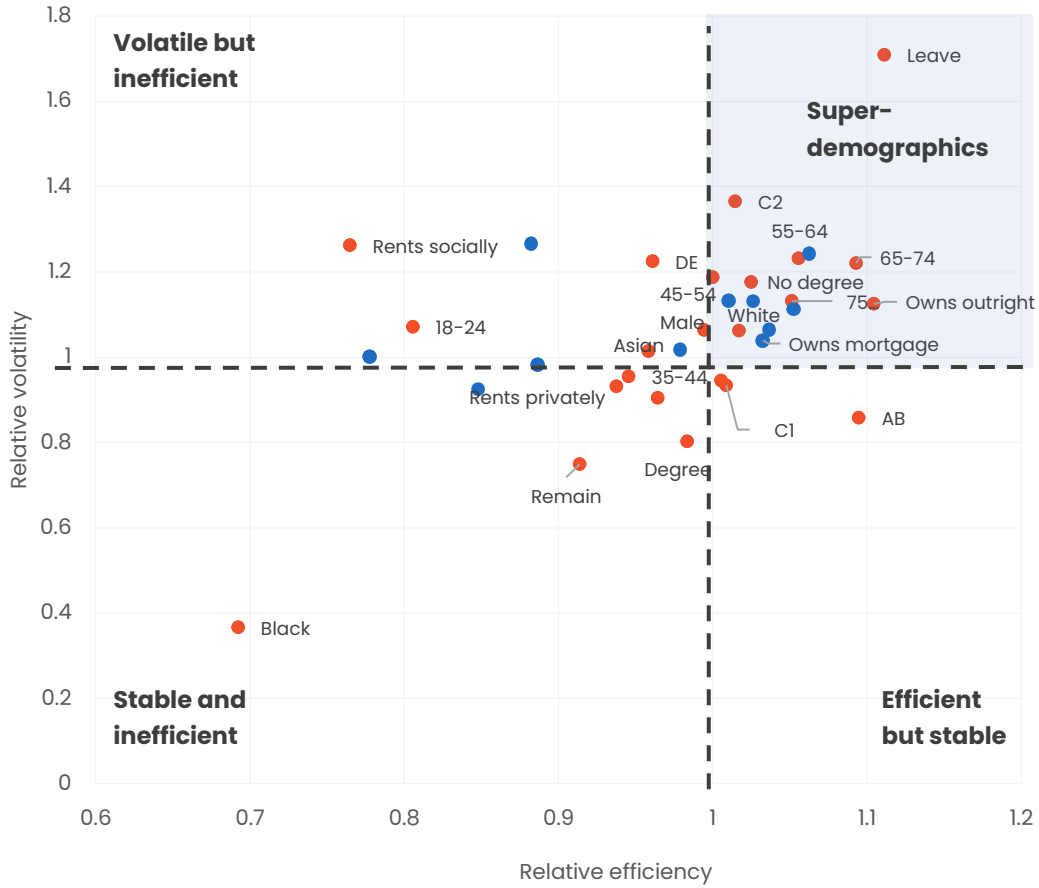
### 3. Conservatives need to focus on “super-demographics”

There are certain types of voters that are particularly common in swing seats - homeowners, for example - whereas others tend to be concentrated in uncompetitive areas (social renters are disproportionately in Labour seats). Some voters may be efficiently distributed geographically, but they may not change their vote very often - they are not “volatile”. These “super-demographics” are determined as a function of two factors: efficiency of distribution and volatility.

The combined efficiency and volatility of a demographic group tells us how important they are in determining the outcome of an election in the first past the post system. Super-demographics are those voters that have above-average volatility and efficiency.

**Figure 110: Demographic groups by FPTP vote efficiency and volatility**

Source: Focaldata megapoll

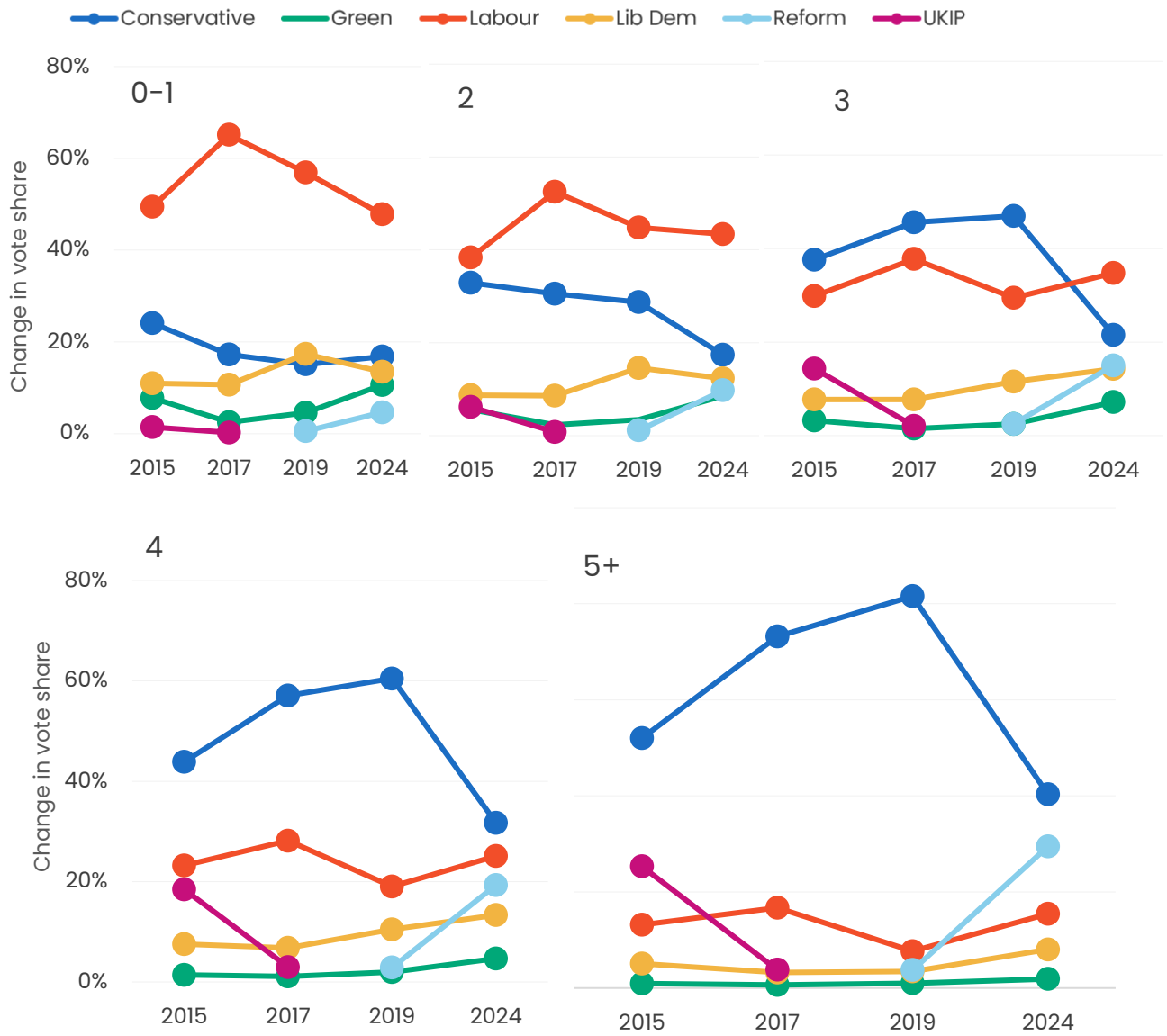


Six groups emerge from our analysis as super-demographics, who are the start but not the end of building a new winning coalition:

- 2016 Leave voters
- Voters aged 55+
- White voters
- Voters without a university degree
- Voters in the C2 social grade
- Outright homeowners

**Figure 111: Change in vote share among voters with super-demographics by party, and by number of super-demographics, 2015 - 2019**

Source: Focaldata megapoll



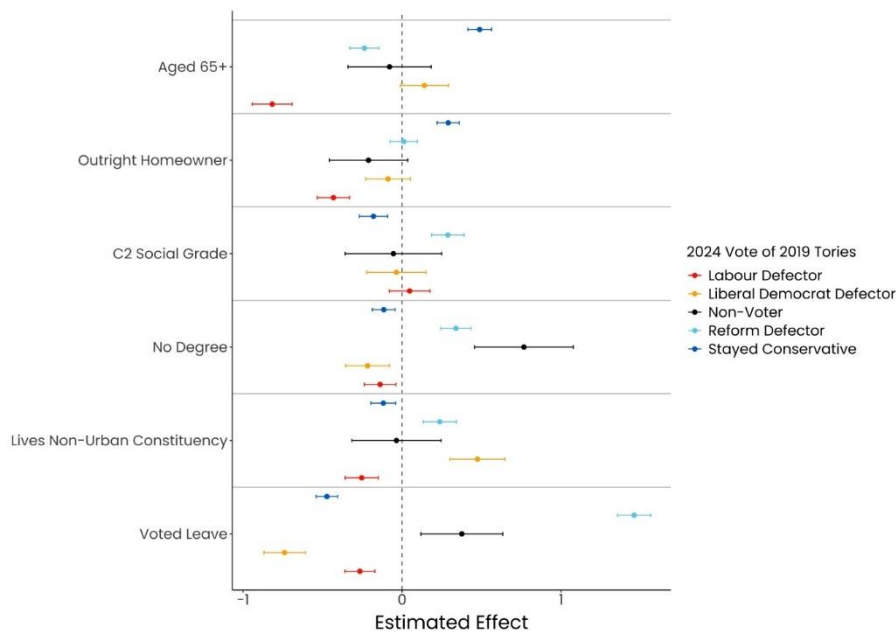
Super-demographics are key to determining general election outcomes. Labour’s largest advances have all been among voters with higher numbers of super-demographics, despite the party’s overall vote share moving little since 2019. Between 2019 and 2024, Labour’s vote share increased by 6% among voters with three or four super-demographics and by 7% among voters with five or more.

The Conservatives were still ahead among voters with four or more super-demographics. But the scale of the swing against the party was so large that it went from winning 82% of voters with five or more super-demographics to just 40% of these voters in 2024.

Voters with super-demographics who voted Conservative in 2019 but defected in 2024 split between different parties. Older voters were more likely to stay Conservative or defect to Reform. Those with no degree were more likely to vote Reform or not vote. Leave voters were more likely to switch to Reform.

**Figure 112: Super-demographic predictors of vote switching (2019 Conservative voters)**

Source: Focaldata megapoll



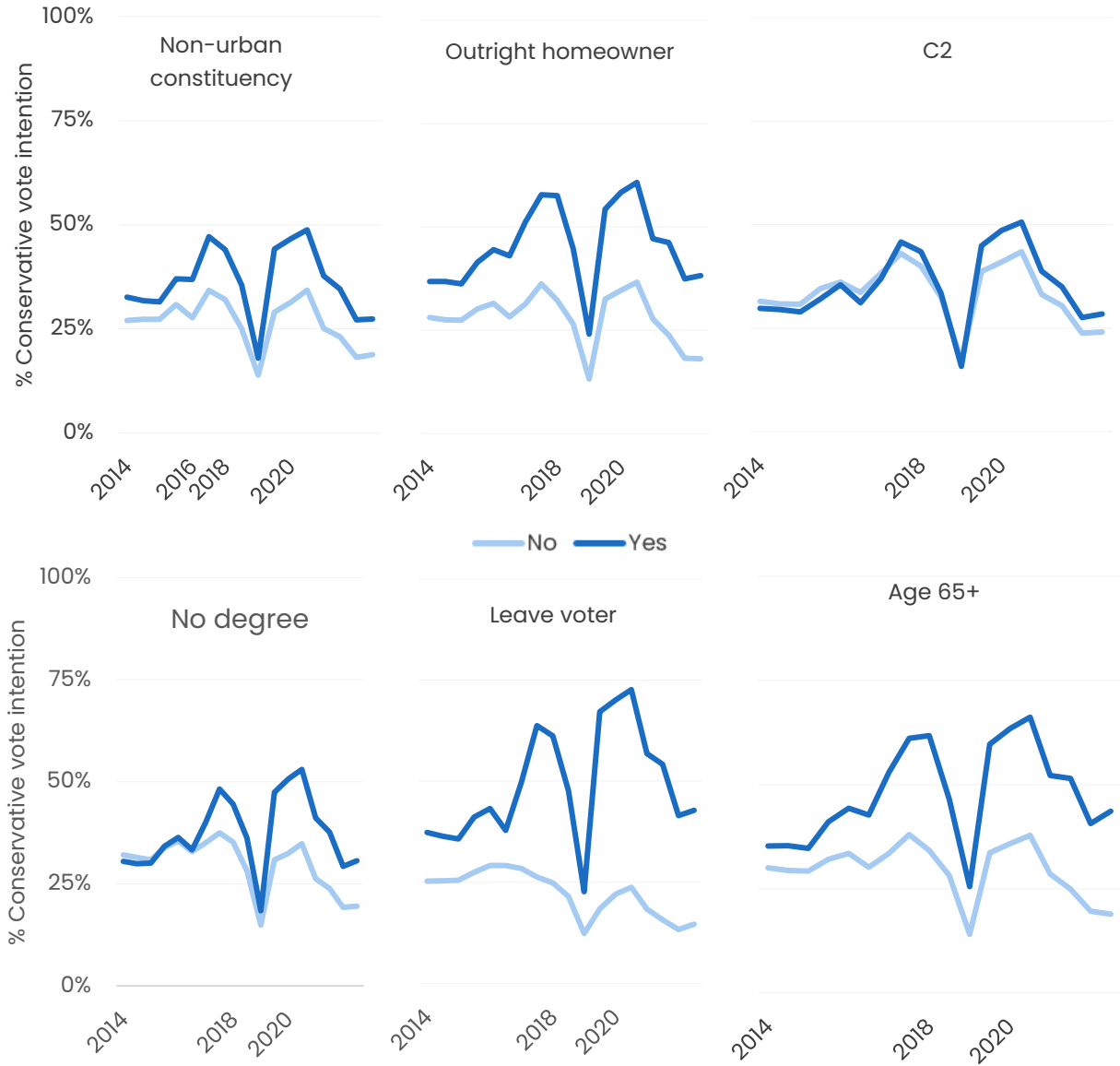
### Voters with super-demographics are more likely to vote Conservative

In addition to having an outsized role in determining election results, voters with super-demographics are more likely to vote Conservative than the average voter. For all six super-demographics, voters with that super-demographic are consistently more likely to vote Tory across time.

The newest super-demographics to the Conservative vote have been non-degree holders and C2 voters. They were not more likely to vote Conservative than average until the 2016 referendum, but the gap widened afterwards. The Conservatives have opened up a consistent lead with these groups following Brexit.

**Figure 113: Voting intention of super-demographics versus average voter, 2014-2023**

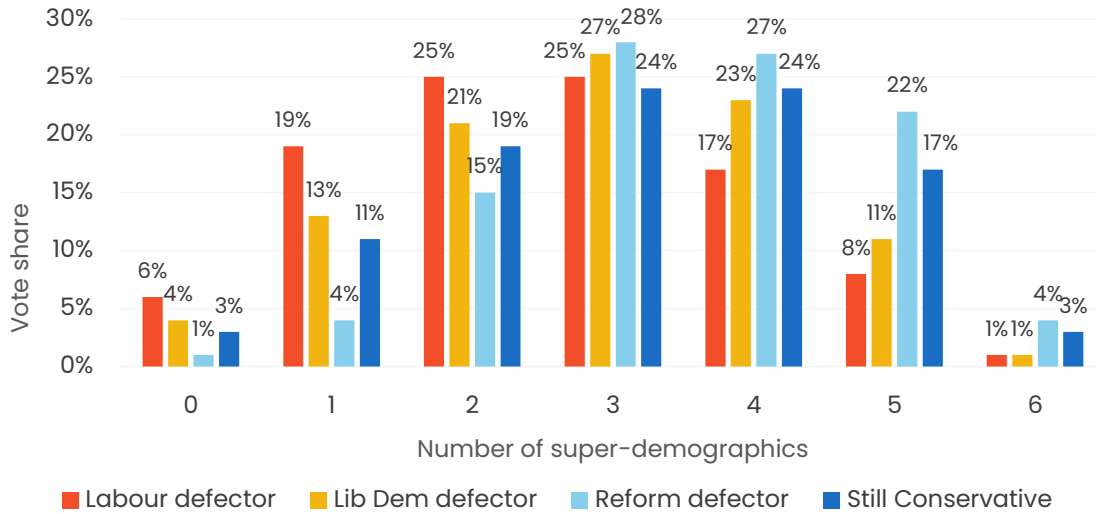
Source: British Election Study Internet Panel Study (BESIP) Waves 1-25



The rise in the Reform vote share in 2024 can also be explained by super-demographics. Reform attracted the votes of those super-demographics most key to the 2019 Conservative coalition. It was the most popular destination for Conservative defectors among voters with three or more super-demographics. Nearly 80% of Conservative defectors with three or more super-demographics went to Reform.

**Figure 114: 2024 vote among 2019 Conservatives, by number of super-demographics**

Source: Focaldata megapoll

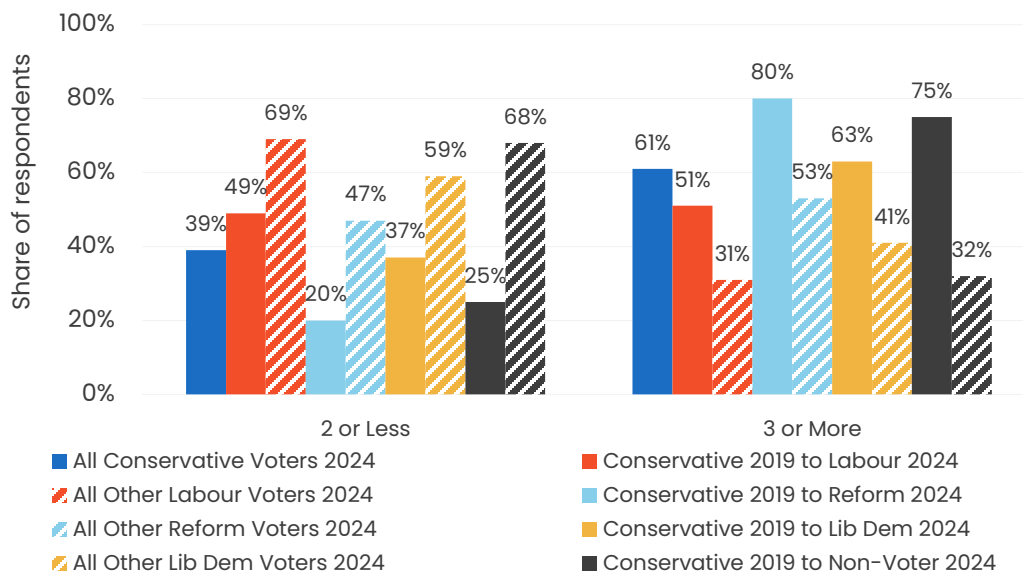


**Conservative vote losses were driven by super-demographics**

Over 80% of Conservative vote losses were driven by people with two or more super-demographics and more than half were driven by those with three or more. Half of voters with super-demographics stayed Conservative in 2024 but half went to other parties.

**Figure 115: Party voted for in 2024 general election by number of super-demographics (2019 Conservative voters)**

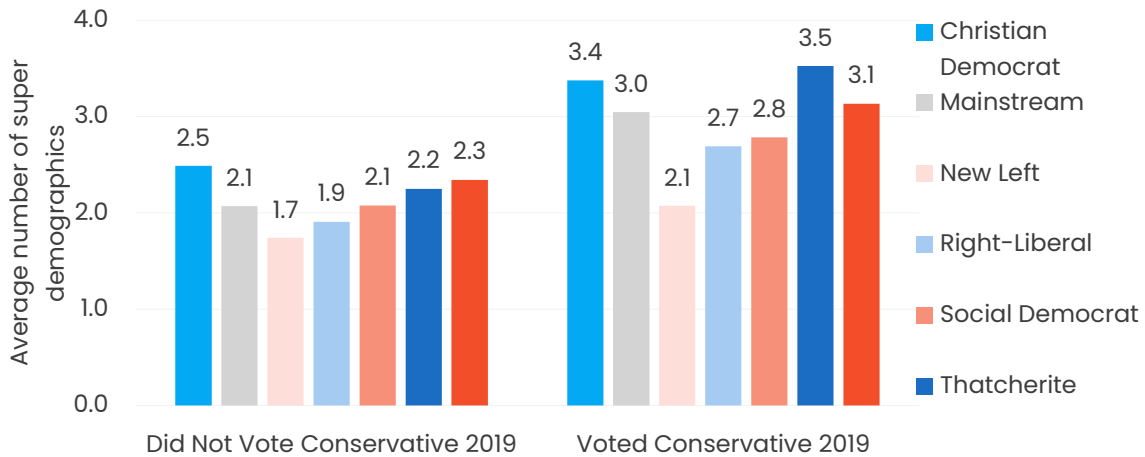
Source: Focaldata megapoll



Conservative-leaning segments tend to have more super-demographics. Thatcherites are particularly prevalent among older, outright home owning, non-urban and Leave backing voters. Christian Democrats are prevalent among older, home owning, C2 social grade, non-degree holding and Leave backing voters. 62% of Thatcherites have three or more super-demographics, while 58% of Christian Democrats have three or more. On the other hand, 76% of New Left voters have two or less, and 68% of Right-Liberals.

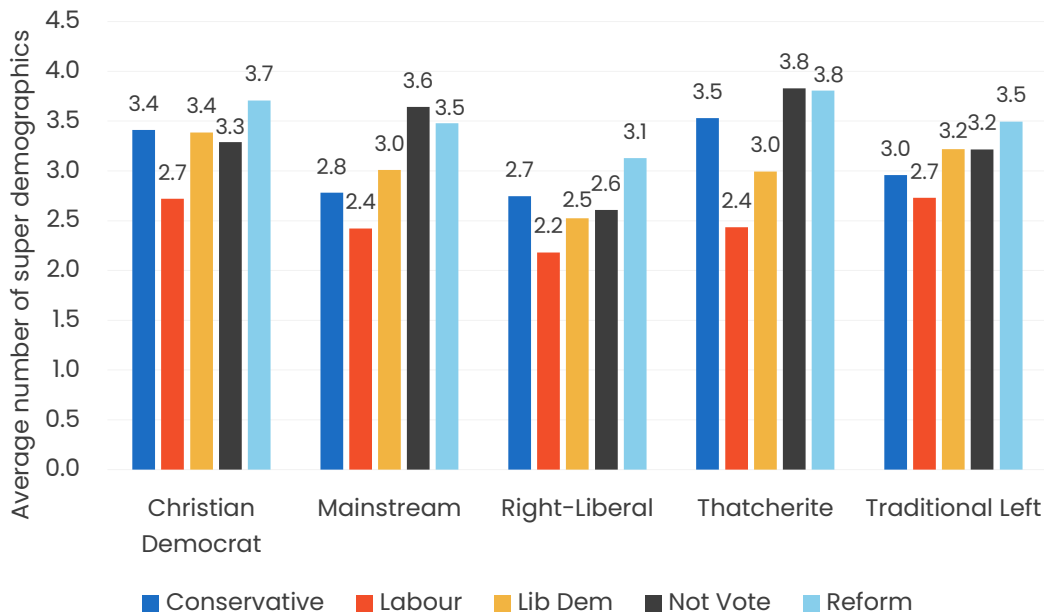
**Figure 116: Number of super-demographics by segment**

Source: Focaldata Megapoll



**Figure 117: Average number of super-demographics by whether voted Conservative in 2019 or not**

Source: Onward-Focal post election poll, August 2nd-14th, 2024



Across all segments, Reform defectors tended to have more super-demographics than those who stayed Conservative. Liberal Democrat defectors have a similar number of super-demographics to those who stayed Conservative across segments. Labour defectors had fewer super-demographics than those who stayed Conservative across segments.

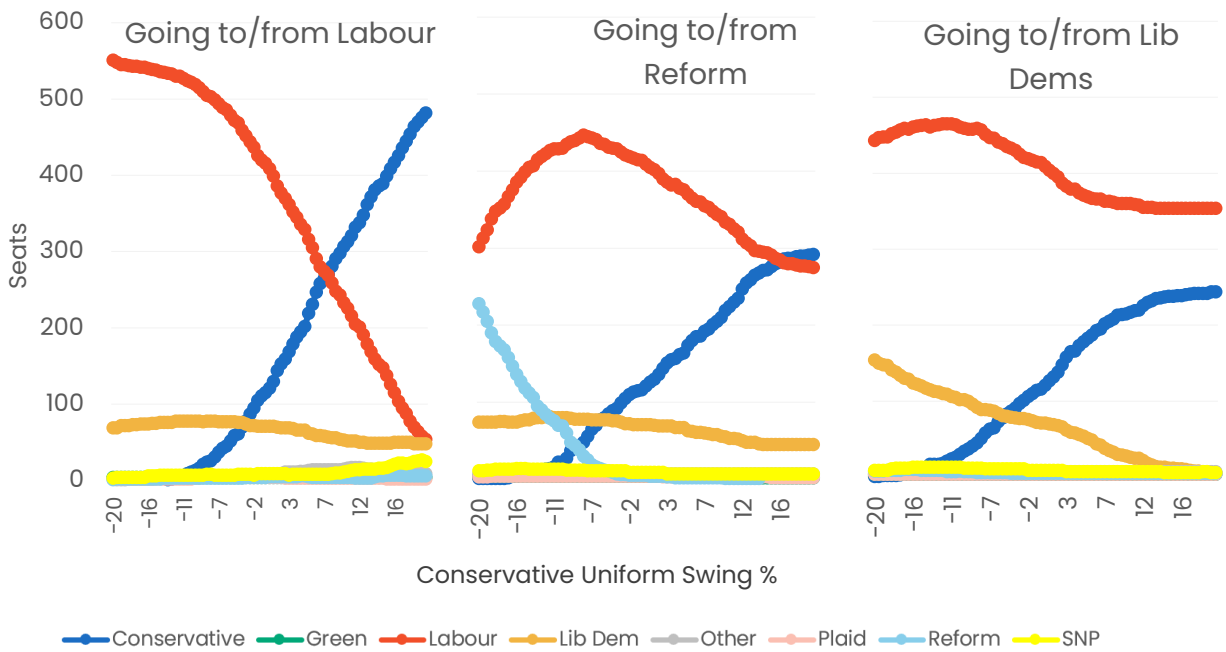
### 3. The need to win back Reform and Liberal Democrat defectors

Winning back Labour voters is typically more efficient as most swing seats are between the Conservatives and Labour - every vote taken from Labour in a seat it holds reduces its majority by two.

But voters who have switched to Labour are much less likely to say they would be willing to consider voting Conservative again. Labour defectors - the biggest prize - are the most difficult to win back.

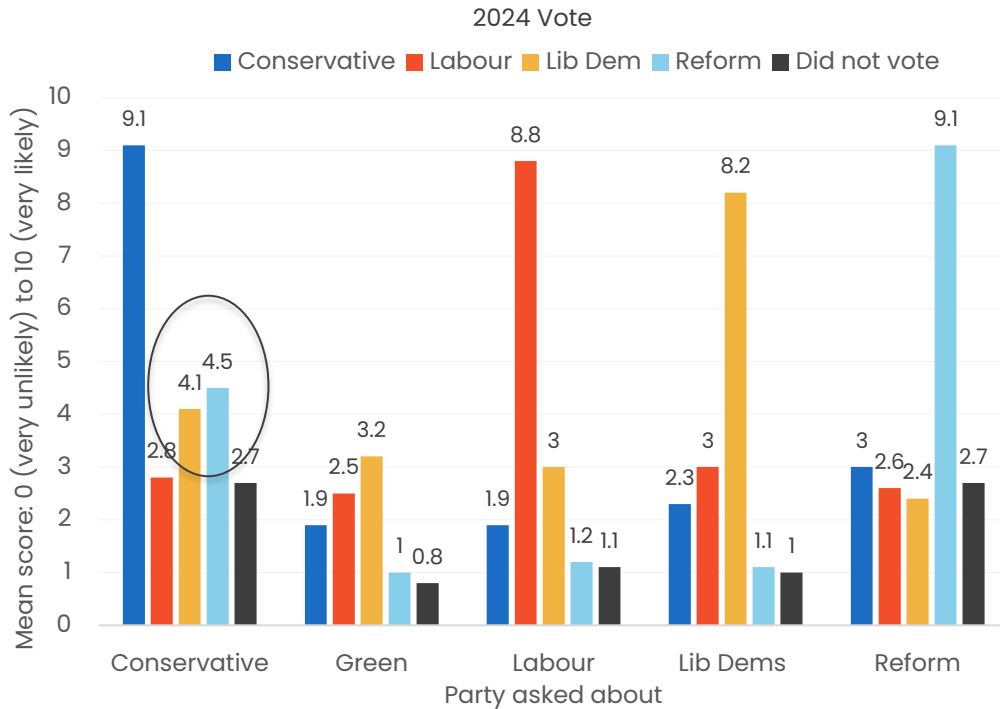
**Figure 118: Change in seat share by percentage uniform swing**

Source: General Election Results 2024, House of Commons Library



**Figure 119: How likely is it that you would ever vote for the following parties? (2019 Conservatives by 2024 vote)**

Source: Onward Foundational Poll



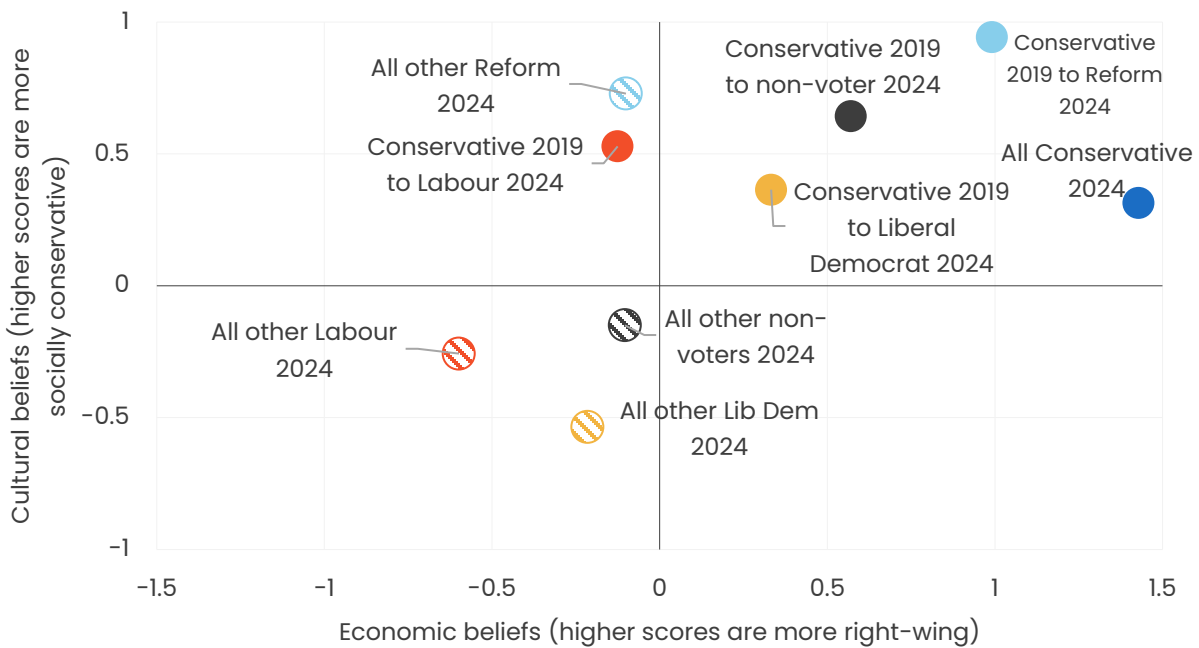
### Liberal Democrat and Reform defectors are more similar to current Conservative voters

While defectors to each of these parties have on average different economic and cultural beliefs, they have more similar beliefs of those who remained with the Conservatives in 2024 than Labour defectors do.

Both Reform and Liberal Democrat defectors are more culturally conservative than Labour defectors and are to the right of them economically, though to the left of current Tories. Importantly, former Conservative defectors to the Liberal Democrats are economically to the right of other Liberal Democrat voters and defectors to Reform are to the right of other Reform voters. Defectors to the Liberal Democrats are also more culturally conservative than other Liberal Democrats. Former Conservative defectors to Labour are more economically centrist than other Labour voters.

**Figure 120: Economic and cultural beliefs (Conservative defectors and all other voters)**

Source: Onward Foundational Poll

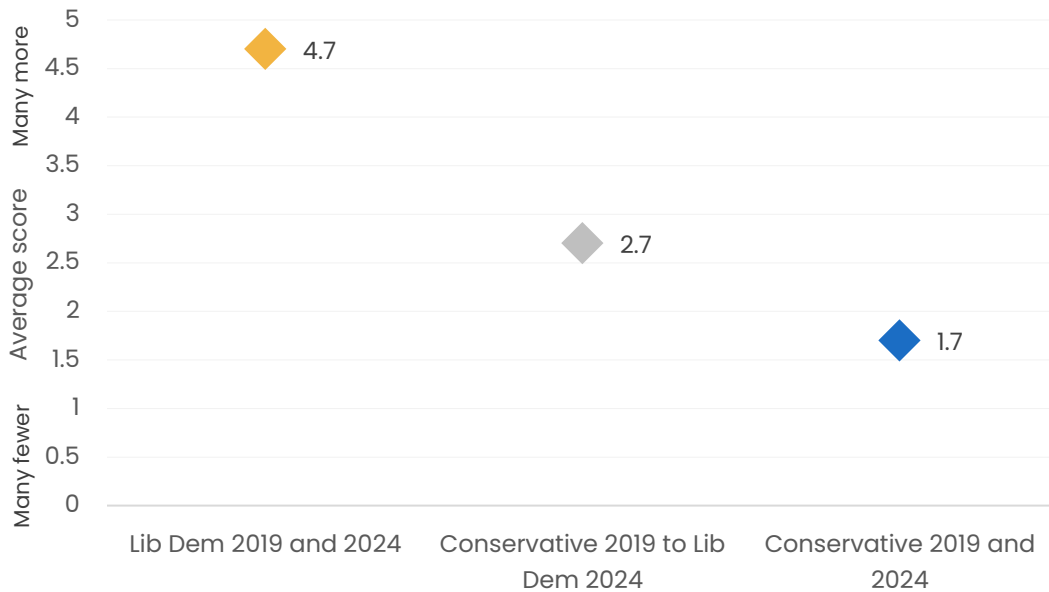


In general, Liberal Democrat and Reform defectors share more super-demographics with current Conservatives than they do with Labour, making them more demographically similar. In particular, it is important to dispel the myth that Liberal Democrat defectors are “liberal” and the Conservatives must move to the “centre” to win them back. The reality is that voters who abandoned the party for the Liberal Democrats hold socially conservative beliefs and are closer to Conservative voters on this dimension than other Liberal Democrat voters.

The below figure compares the average political beliefs of people who voted Conservative in 2019 and 2024, people who voted Liberal Democrat in 2019 and 2024, and people who voted Conservative in 2019 but Liberal Democrat in 2024. As can be seen, Liberal Democrat defectors are far closer to Conservative voters on immigration, Britain’s relationship with the EU.

**Figure 121: Some people think that the UK has allowed many more immigrants to come to the UK to live and others think that the UK should allow many fewer immigrants. Where do you sit on this scale? (2019 and 2024 Liberal Democrat voters, Conservative–Liberal Democrat switchers, 2024 Conservatives)**

Source: British Election Study Internet Panel Wave 29



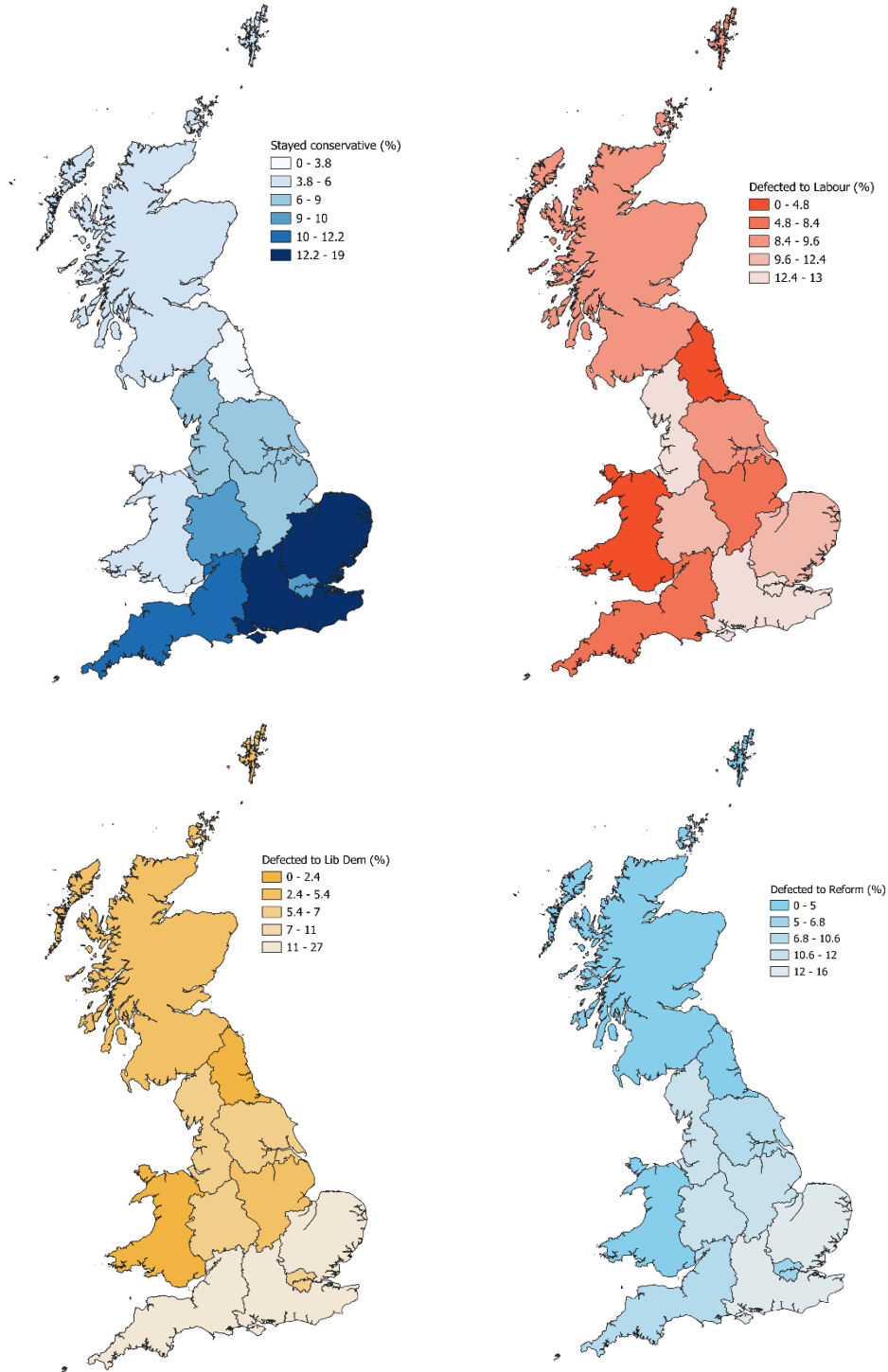
### The efficiency of targeting Liberal Democrat and Reform voters

Targeting both Liberal Democrat and Reform defectors is the most efficient way to improve the Conservatives’ standing from its current low base. They are more demographically and ideologically similar to current Conservatives and show comparatively greater willingness to consider voting Conservative again. Winning voters from these groups first would chart a course to winning over a 100 seats and towards a hung Parliament.

Both defector groups help the Conservative route back to a hung Parliament in different ways. Targeting Liberal Democrat defectors, who are concentrated in the South East and South West, would be efficient for winning back Liberal Democrat held seats. And winning back Reform voters would help with vote share across the country, where the Reform vote was evenly spread, often handing seats to Labour.

**Figure 122: Heat maps of 2019 Conservative defectors in 2024 by party vote**

Source: Focaldata and Onward analysis



# Conclusion



The 2024 election result was the product of multiple factors coalescing. The 2019 voter coalition built by Boris Johnson fell apart, but in multiple directions. To begin rebuilding, Conservatives must begin to take the following steps.

**Regain a perception of competence.** The Conservatives usually do best when they are seen to deliver, especially on responsible management of the economy. The disaster of the Truss Government and mini-budget destroyed this reputation in a way that was near irrecoverable by 2024, and the in-fighting and repeated changes of leadership meant that Labour's "end the chaos" narrative cut through. The party must offer stable, credible leadership, avoid perceptions of in-fighting and offer a clear plan to tackle the policy issues that matter most to voters - especially immigration, the NHS, the cost of living, taxation and crime.

**Regain voters' trust.** Overall belief in the integrity of the Johnson Government fell apart after "Partygate". Successive scandals after this and the perception that Johnson himself lied to Parliament and the country compounded this sense of corruption and lack of integrity. Honesty and character will matter a lot to rebuild in Opposition. Voters also lost trust in the party's willingness and ability to deliver key manifesto pledges from 2019. Therefore 2024 manifesto pledges were simply not believed. It will be difficult from Opposition, but faith in the integrity of Conservative leaders and the party's ability to fulfil its promises must be restored.

**Win back defectors, starting with "super-demographics".** The Conservatives lost with a vital electoral group who have a disproportionate influence over election results. These are older voters, those without degrees, Leave supporters, voters in less dense constituencies and outright home-owners. Those with more super-demographics are more electorally significant and winning them back is the most efficient way to begin climbing the electoral mountain back to a majority.

**Win back Reform and Liberal Democrat defectors.** These will be the most realistic voters to begin winning back. 23% of the Conservative vote went to Reform, 13% to Labour and 7% to the Liberal Democrats. Counter-intuitively, Reform and Liberal Democrat defectors share a lot of demographic and ideological characteristics, wanting immigration cuts and toughness of crime, together with competence and honesty. The NHS and public services are a particular priority for Liberal Democrat defectors and for those who did not vote. Former Conservatives who backed Reform or the Liberal Democrats this time are more conservative than average for those parties on both social and economic issues - they are more similar in values to Conservative voters than their new parties.

**Build a sustainable coalition of voter segments.** The 2019 party was able to hold together the traditional coalition of Thatcherite, Christian Democrat and Right-Liberal voters, win a plurality of the Mainstream and make strong inroads into the

Traditional Left. However, these voter segments have different and sometimes conflicting priorities, including on the economy and the ECHR. The party will need to decide what its target coalition is for a sustainable future base. The party benefited from a “realignment” dynamic in 2017 and 2019 which has now largely dissipated, yet Cameron’s 2015 coalition has gone. A new coalition will have to be built, and trade-offs may need to be dealt with - including the conflicting priorities of the pro-Brexit Traditional Left and Right-Liberals.

**Steer towards the common ground.** Rather than the “centre ground”, which is usually defined as the median view among elected politicians, the common ground describes the views of the average voter. Immigration is the top priority for almost every voter group analysed in this report, followed by the NHS and general competence and delivery. The party will have to decide how far to steer towards Mainstream views on the economy, which favour more spending on public services.

The Conservative party cannot be all things to all voters, not should it try to be. But it needs to be enough for enough voters, and that was not the case in 2024. An explosive combination of short and long-term factors, loss of trust, lack of delivery on promises and a sense that the country is getting worse - especially in relation to immigration and the NHS - proved fatal. Areas where the party was seen positively - such as on Brexit or the vaccine rollout - ceased to be relevant.

The more optimistic news is that a large percentage of the electorate to some degree hold small-c conservative values. There are fundamental tensions on the right balance between taxation and funding public services where the Conservative-leaning segments disagree. Likewise there are disagreements about Britain’s proximity to the EU and ECHR.

There will be trade-offs and choices, but a plausible coalition of voter segments is needed. There was little to no enthusiasm for Keir Starmer or Labour - his victory was a function of ultra-efficient vote distribution and exhaustion with the Conservatives. But the party must now work to rebuild a workable centre-right coalition.

# Appendix



# Onward report – Breaking Blue – Appendix

## Focaldata polling

### Polls Used in Breaking Blue Report

#### Onward Foundational Poll

Fieldwork: 10 May 2024 - 28 May 2024

Sample Size: 10,118

Weighted By: Age, Gender, Education, Region, Ethnicity, 2024 Vote (re-weighted after the election based final result)

#### Onward Kick-Off

Fieldwork: Fieldwork: 24 May 2024 - 30 May 2024

Sample Size: 4,096

Weighted By: Age, Gender, Education, Region, Ethnicity, 2024 Vote (re-weighted after the election based final result)

#### Focaldata Megapoll

Fieldwork: Conducted over the course of the general election campaign (30 May 2024 - 1 July 2024)

Sample Size: 52,907

Weighted By: Age, Gender, Education, Region, Ethnicity, 2024 Vote (re-weighted after the election based final result)

#### Onward Post-Election Poll

Fieldwork: 2 Aug 2024 - 14 Aug 2024

Sample Size: 10,038

Weighted By: Age, Gender, Education, Region, Ethnicity, 2024 Vote

## JL Partners focus groups

JL Partners ran 13 focus groups spread over the course of the general election campaign in 7 constituencies: North Cornwall, Tunbridge Wells, Cannock Chase, Hartlepool, Bolsover, Rother Valley, and South Cambridgeshire.

Participants were recruited by independent market research agencies and included a mix of voter groups tailored to understand the 2024 result. They were: defectors from Conservative to Reform, defectors from Conservative to Liberal Democrat, defectors from Conservative to Labour, soft Conservative voters, soft Labour voters and groups with a mix of 2019 Conservative voters.

## Methodology – seat outturn scenarios

**Seat share if Conservative and Reform votes aggregated:** Seat projections were calculated by aggregating the Conservative vote with the Brexit Party/Reform UK vote in each constituency and treating them as one party.

### **Seat share if Nigel Farage had not returned:**

This analysis aimed to model the potential impact of a partial redistribution of Reform party votes across UK constituencies based on the actual results of the 2024 election and our polling. The process involved several steps to adjust the actual vote totals at the election to determine new constituency winners based on these adjustments.

Initially, 14.9% of the Reform party's votes in each constituency were removed, which corresponded with the percentage in our poll who said they would not have voted without Farage's return. Of the original Reform vote, 25.5% was then redistributed to other parties according to the ratio from our poll who said they would have voted for a different party without Farage. This was done separately for England, Scotland and Wales, given the results for SNP and Plaid Cymru.

In England, Reform votes were redistributed: 55.5% to the Conservatives, 19.7% to Labour, 12.7% to Other parties, 7.62% to the Liberal Democrats, and 4.4% to the Green party. The remaining Reform votes (59.6% of their original total) were left with the Reform party.

In Scotland, Reform votes were redistributed: 14.5% to the Conservatives, 28.8% to Labour, 32.0% to the Liberal Democrats, and 24.7% to the SNP. The remaining Reform votes (59.6% of their original total) were left with the Reform party.

In Wales, Reform votes were redistributed: 62.2% to the Conservatives, 18.8% to Labour, 7.07% to the Liberal Democrats, 4.85% to Other and 7.07% to Plaid Cymru. The remaining Reform votes (59.6% of their original total) were left with the Reform party.

After this redistribution, new vote totals were calculated for each party in every constituency. To determine the winning party in each constituency, we employed the 'first past the post' system, where the party with the most votes in a constituency wins that seat.

## “Red Wall” seat definition

For the purposes of this report, “Red Wall” seats are defined as those with the following characteristics:

1. Have had a significant Leave vote in the 2016 European Union referendum (greater than 55 per cent);
2. Have had a substantial minority Conservative vote in recent elections (Conservative vote share greater than 25 per cent in 2017);
3. Have seen this minority vote growing ever more threatening to Labour (Conservative swing greater than five per cent from 2010 to 2017);
4. Have a residual below the 75th percentile.

## “Blue Wall” seat definition

For the purposes of this report, “Blue Wall” seats are defined as those with the following characteristics:

1. In the South of England
2. Won by the Tories in 2019
3. Voted to remain in the EU in 2016
4. Over 30% of the adult population is degree-educated

## Changing vote of voters with super-demographics

Table on super-demographics by 2019 and 2024 Conservative vote

	2019 Tory vote	2024 Tory vote	Change
<b>Home Ownership</b>			
Owns their home outright	0.56	0.31	-0.25
Owns their home through a mortgage or shared	0.40	0.18	-0.21
Private renter	0.34	0.15	-0.19
Social renters	0.33	0.13	-0.21
<b>Age</b>			
18 to 24 years old	0.24	0.11	-0.13
24 to 34 years old	0.27	0.14	-0.13
35 to 44 years old	0.33	0.15	-0.18

45 to 54 years old	0.42	0.18	-0.24
55 to 64 years old	0.50	0.22	-0.27
65 to 74 years old	0.59	0.33	-0.26
Over 75 years old	0.66	0.43	-0.23

<b>Social Grade and Income</b>	<b>2019 Tory vote</b>	<b>2024 Tory vote</b>	<b>Change</b>
AB	0.45	0.25	-0.20
C1	0.45	0.21	-0.24
C2	0.46	0.19	-0.28
DE	0.41	0.16	-0.24
<b>Education</b>	<b>2019 Tory vote</b>	<b>2024 Tory vote</b>	<b>Change</b>
Degree level of above	0.38	0.21	-0.17
Below degree level	0.49	0.22	-0.27
<b>EU Referendum Vote</b>	<b>2019 Tory vote</b>	<b>2024 Tory vote</b>	<b>Change</b>
Don't know	0.27	0.13	-0.14
Did not vote	0.28	0.12	-0.16
Leave	0.67	0.31	-0.36
Remain	0.28	0.19	-0.10
<b>Non-Urban Constituency</b>	<b>2019 Tory vote</b>	<b>2024 Tory vote</b>	<b>Change</b>
Urban	0.36	0.21	-0.15
Non-Urban	0.48	0.26	-0.22

## Methodology of the segmentation analysis

### Data

Focldata combined data from the British Social Attitudes (BSA) survey, the British Election Study (BES) to analyse UK politics since the mid-1980s. Both the BSA and BES are highly representative samples and have been asked periodically at least every 12 months, which has the advantage of allowing us to track changes in public opinion and political attitudes over time.

By combining these long-running and reputable survey sources, we gain valuable insights into the evolution of political views, party support, and societal attitudes in the UK. This is particularly useful for understanding how major events, government policies, or shifts in the political landscape may have influenced public sentiments and voting behaviours. Additionally, the large sample sizes and representative nature of these surveys lend credibility to the findings and allow for robust statistical analyses and generalisations about the British population.

Specifically, the datasets used are:

- The British Election Study post-election surveys 1987, 1992, 1997, 2001, 2005 and 2010
- British Social Attitudes surveys 1986-2013
- The British Election Study Internet Panel Study 2014-present

Focaldata also added its own survey that was run before the 2024 election which also included the same segmentation questions so that we had data to capture attitudes in the immediate period.

### **Segmentation Questions**

These datasets include the attitudinal survey questions that we use for segmentation. These are five questions that uncover a person's economic values (left-wing to right-wing) and five that reveal their non-economic cultural values (socially liberal to socially conservative). Each question is on a five-point scale from 'strongly disagree' to 'strongly agree'.

This has the advantage that they should provide a well-rounded perspective on individuals' political and social ideologies, allowing for more nuanced and accurate segmentation. Political and social attitudes are often multidimensional, and considering both economic and cultural aspects provides a richer analysis. The standardisation of questions enhances the reliability and comparability of the data collected.

The economic values questions ask people's agreement with the following, where agreement indicates the person is more left-wing:

- Redistribution from the better off to the worse off
- That there is 'one law for the rich and one law for the poor'
- That businesses take advantage of people
- That ordinary people do not get their fair share of the nation's wealth
- That management will always try to get the better of their employees

The non-economic cultural values questions ask people's agreement with the following, where agreement indicates greater social conservatism:

- Young people don't respect traditional British values
- The death penalty should be used for some crimes
- Schools should teach children to obey authority
- Censorship is necessary to uphold morality
- Criminals should be given longer sentences

To combat missing data, we only use respondents who have answered at least three of the questions in each dimension. This means that the specific surveys that we used were:

- British Social Attitudes Survey (1986)
- British Social Attitudes Survey (1987)
- British Election Study (1987)
- British Social Attitudes Survey (1989)
- British Social Attitudes Survey (1990)
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- British Social Attitudes Survey (2013)
- British Election Study Internet Panel Waves 1-25 (2014-2023)
- Onward-Focaldata Pre-Election Poll (2024)

From this subset, in order to have as full of a picture as possible, we impute missing values using a person's answers to the other value questions. We use multiple imputation, which is a statistical technique used to handle missing data in a dataset. It involves replacing the missing values with plausible values multiple times and then pooling results to generate the more accurate estimates. This means we have 810,702 observations across the different surveys, each with an answer to all ten of the segmentation questions.

From these, we calculated the mean value for each variable (1 for 'strongly disagree' and 5 for 'strongly agree') within each wave of the data. We then calculated the difference between each value and its corresponding wave average, which is a process referred to as "centering". This means we know how far from average a person is for each question.

This is important because what constitutes, for example, social conservatism has changed over the years. By centering the variables and relating individuals to the wave averages, we can effectively compare individuals across different time periods on a more meaningful and consistent scale.

By looking at how far an individual deviates from average for that specific time period, this relative positioning provides insights into how moderate or radical an individual's views are compared to others within the same context. This is particularly important when examining attitudes that may be influenced by the broader social, political, or cultural shifts over time.

### **Principal Component Analysis (PCA)**

To ensure that the two dimensions really are tapping into two separate concepts, we then performed Principal Component Analysis (PCA) on the centred imputed variables. PCA is a dimensionality reduction technique, meaning we can identify the underlying patterns or structures in people's answers. By conducting PCA, we can empirically verify whether the survey questions on economic values and non-economic cultural values are indeed tapping into two separate and distinct concepts or dimensions.

Figure 1 shows the number of principal components to retain. This shows that using two components explains 60.5% of the variances in answers. This is a strong indication that the survey questions are effectively capturing two distinct dimensions and that using any more than two dimensions would add little to the analysis.

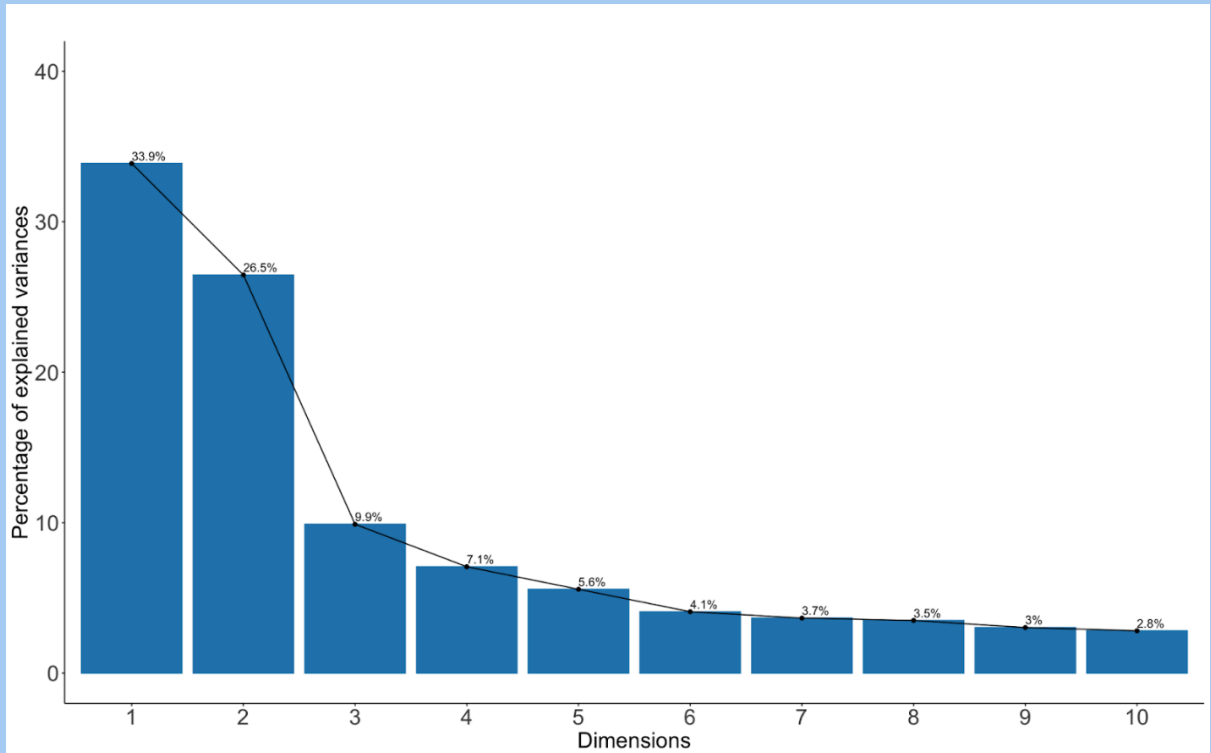


Figure 1: Screen Plot of the percentage of variance is explained in ten segmentation values questions

Which questions make up the two dimensions? Figure 2 shows the contributions of each original variable to the principal components. This clearly shows that the five economic and five non-economic questions cluster together, are positively correlated and represent distinct underlying factors. The clear clustering into separate groups empirically confirms the theoretical framework underpinning the survey design. Therefore, we extract the scores of the two principal components and add them to the original dataset to give each respondent an economic and non-economic beliefs score.

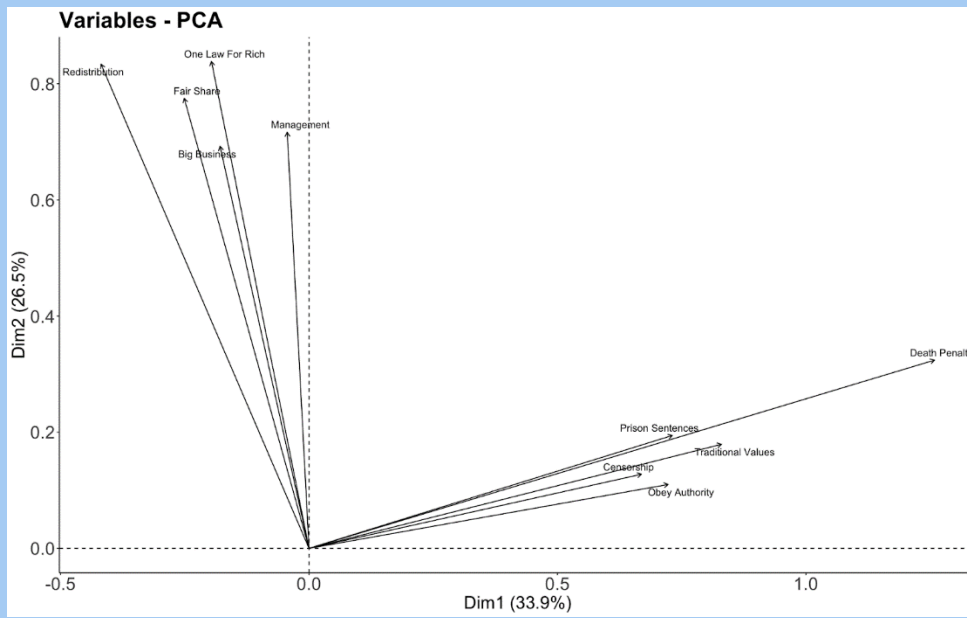


Figure 2: Variable Loadings Plot of ten segmentation questions

## Clustering

To group together people with similar political values on these two dimensions, we use a clustering technique called k-means clustering, which is an unsupervised machine learning algorithm used to cluster similar data points together. K-means clustering has the benefit of being simple and efficient, which is particularly useful given the large number of respondents in the complete dataset. Its simplicity enhances interpretability and ease of implementation, while its efficiency enables scalable analysis, which is crucial when working with survey data with a large number of respondents like we are. We specify for the algorithm to create seven different clusters.

While analysing discrete groups provides a convenient framework for interpretation and a useful shorthand for understanding individuals' political values, it is crucial to recognise the limitations of this approach. Many individuals have values that straddle the cutoff points, so a substantial number of those assigned to different groups may possess similar factor scores. This segmentation is a simplification of reality, but is easier to interpret and is a useful shorthand for what political values people have.

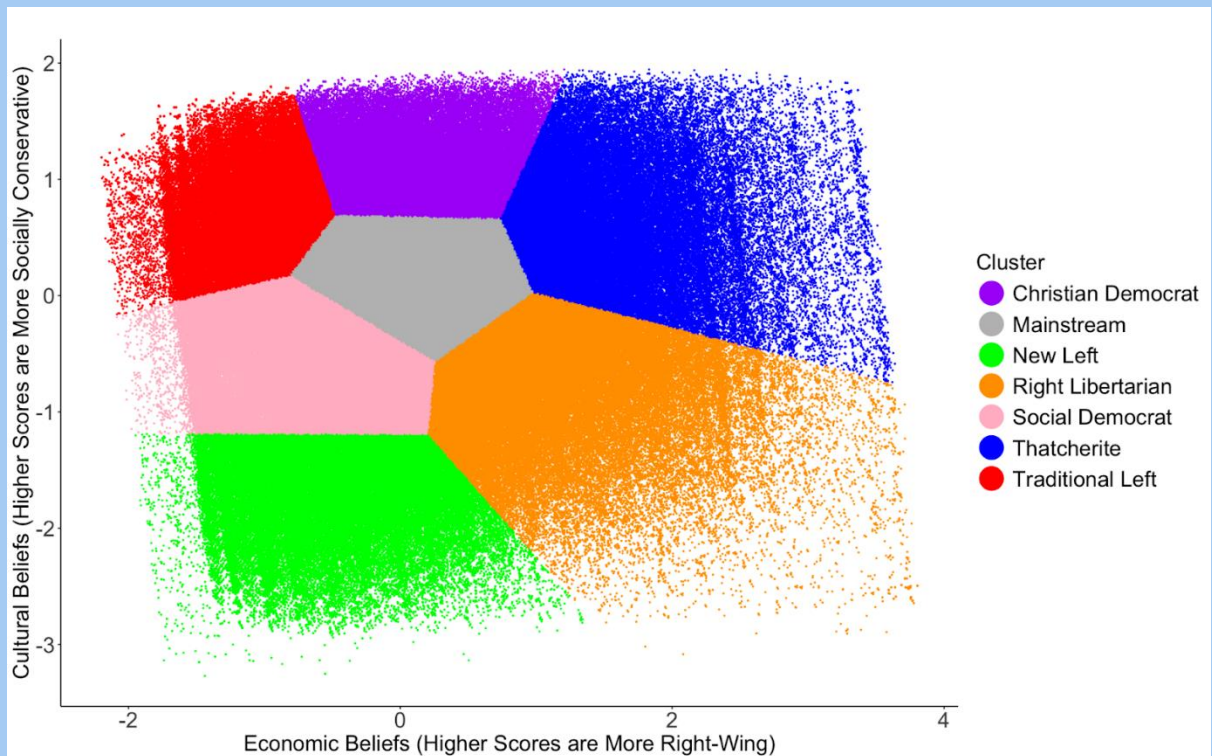


Figure 3: Two-dimensional political compass of seven clusters

## Demographics of the electoral segments

### Demographics of Thatcherites

Percentage of the population in 2024: **9.0%**

Mean age in 2024 (*Wave mean*): **54** (46)

Male / Female in 2024 (*Wave mean*): **56.7% / 43.3%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **86.1% / 13.9%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **73.8%** (55.8%)

University Education in 2024 (*Wave mean*): **35.5%** (32.7%)

### Region (*Wave mean*):

North East: **3.5%** (4.2%)

North West: **9.2%** (11.3%)

Yorkshire and the Humber: **6.7%** (8.5%)

East Midlands: **8.3%** (7.5%)

West Midlands: **8.7%** (9.0%)

East of England: **10.6%** (9.6%)

Greater London: **13.8%** (13.5%)

South East: **17.5%** (14.1%)

South West: **8.4%** (8.8%)

Wales : **4.9%** (4.9%)

Scotland: **8.4%** (8.6%)

**2024 Vote (Overall result):**

Labour: **15.9%** (33.7%)

Conservative: **50.6%** (23.7%)

Lib Dem: **7.8%** (12.2%)

Reform: **18.7%** (14.3%)

Green: **3.0%** (6.4%)

SNP: **0.5%** (2.5%)

Plaid: **0.2%** (0.7%)

**Demographics of Christian Democrats**

Percentage of the population in 2024: **11.0%**

Mean age in 2024 (*Wave mean*): **51** (46)

Male / Female in 2024 (*Wave mean*): **48.1% / 51.8%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **82.9% / 17.1%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **63.0%** (55.8%)

Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **27.5%** (32.7%)

Region (*Wave mean*): North East **4.2%** (4.2%)

North West **13.8%** (11.3%)

Yorkshire and the Humber **10.6%** (8.5%)

East Midlands **7.2%** (7.5%)

West Midlands **8.2%** (9.0%)

East of England **10.7%** (9.6%)

Greater London **11.5%** (13.5%)

South East **14.4%** (14.1%)

South West **8.3%** (8.8%)

Wales **5.6%** (4.9%)

Scotland **5.7%** (8.6%)

2024 Vote (Result): Labour: **28.0%** (33.7%)

Conservative: **33.1%** (23.7%)

Lib Dem: **9.7%** (12.2%)

Reform: **20.3%** (14.3%)

Green: **3.2%** (6.4%)

SNP: **1.0%** (2.5%)

Plaid: **0.8%** (0.7%)

## Demographics of Right-Liberals

Percentage of the population in 2024: **16.8%**

Mean age in 2024 (*Wave mean*): **41** (46)

Male / Female in 2024 (*Wave mean*): **49.6% / 50.3%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **76.0% / 24.0%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **52.2%** (55.8%)

Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **38.8%** (32.7%)

Region (*Wave mean*): North East **2.9%** (4.2%)

North West **11.4%** (11.3%)

Yorkshire and the Humber **7.6%** (8.5%)

East Midlands **8.0%** (7.5%)

West Midlands **10.0%** (9.0%)

East of England **8.4%** (9.6%)

Greater London **18.6%** (13.5%)

South East **13.6%** (14.1%)

South West **7.6%** (8.8%)

Wales **4.7%** (4.9%)

Scotland **7.2%** (8.6%)

2024 Vote (*Result*): Labour: **35.3%** (33.7%)

Conservative: **24.3%** (23.7%)

Lib Dem: **16.8%** (12.2%)

Reform: **8.8%** (14.3%)

Green: **7.1%** (6.4%)

SNP: **1.7%** (2.5%)

Plaid: **0.5%** (0.7%)

## Demographics of Social Democrats

Percentage of the population in 2024: **15.3%**

Mean age in 2024 (*Wave mean*): **43** (46)

Male / Female in 2024 (*Wave mean*): **48.1% / 51.9%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **83.6% / 16.4%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **49.7%** (55.8%)

Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **36.6%** (32.7%)

Region (*Wave mean*): North East **3.5%** (4.2%)

North West **10.8%** (11.3%)

Yorkshire and the Humber **7.1%** (8.5%)

East Midlands **7.7%** (7.5%)  
West Midlands **7.3%** (9.0%)  
East of England **9.2%** (9.6%)  
Greater London **14.1%** (13.5%)  
South East **15.3%** (14.1%)  
South West **9.7%** (8.8%)  
Wales **6.5%** (4.9%)  
Scotland **8.9%** (8.6%)

2024 Vote (Result): Labour: **47.9%** (33.7%)  
Conservative: **6.8%** (23.7%)  
Lib Dem: **13.0%** (12.2%)  
Reform: **7.0%** (14.3%)  
Green: **10.4%** (6.4%)  
SNP: **3.6%** (2.5%)  
Plaid: **1.1%** (0.7%)

### **Demographics of the Traditional Left**

Percentage of the population in 2024: **17.5%**  
Mean age in 2024 (*Wave mean*): **47** (46)  
Male / Female in 2024 (*Wave mean*): **49.9% / 50.1%** (48.8% / 51.0%)  
White / Non-White in 2024 (*Wave mean*): **83.3% / 16.7%** (81.6% / 18.4%)  
Homeownership in 2024 (*Wave mean*): **50.5%** (55.8%)  
Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **28.0%** (32.7%)

Region (*Wave mean*): North East **3.9%** (4.2%)  
North West **13.3%** (11.3%)  
Yorkshire and the Humber **10.3%** (8.5%)  
East Midlands **7.3%** (7.5%)  
West Midlands **9.7%** (9.0%)  
East of England **7.9%** (9.6%)  
Greater London **13.1%** (13.5%)  
South East **12.2%** (14.1%)  
South West **8.0%** (8.8%)  
Wales: **4.5%** (4.9%)  
Scotland **9.6%** (8.6%)

2024 Vote (Result): Labour: **38.2%** (33.7%)  
Conservative: **16.6%** (23.7%)  
Lib Dem: **11.0%** (12.2%)  
Reform: **18.6%** (14.3%)

Green: **5.5%** (6.4%)

SNP: **3.0%** (2.5%)

Plaid: **1.0%** (0.7%)

### Demographics of the New Left

Percentage of the population in 2024: **6.8%**

Mean age in 2024 (*Wave mean*): **43** (46)

Male / Female in 2024 (*Wave mean*): **52.2% / 47.6%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **89.9% / 10.1%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **53.0%** (55.8%)

Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **53.5%** (32.7%)

Region (*Wave mean*): North East **3.4%** (4.2%)

North West **13.4%** (11.3%)

Yorkshire and the Humber **7.3%** (8.5%)

East Midlands **8.8%** (7.5%)

West Midlands **7.4%** (9.0%)

East of England **7.2%** (9.6%)

Greater London **13.5%** (13.5%)

South East **12.9%** (14.1%)

South West **8.9%** (8.8%)

Wales **6.5%** (4.9%)

Scotland **10.6%** (8.6%)

2024 Vote (*Result*): Labour: **50.9%** (33.7%)

Conservative: **2.4%** (23.7%)

Lib Dem: **15.3%** (12.2%)

Reform: **1.7%** (14.3%)

Green: **17.0%** (6.4%)

SNP: **5.5%** (2.5%)

Plaid: **1.2%** (0.7%)

### Demographics of the mainstream

Percentage of the population in 2024: **23.6%**

Mean age in 2024 (*Wave mean*): **44.0** (46)

Male / Female in 2024 (*Wave mean*): **47.1% / 52.9%** (48.8% / 51.0%)

White / Non-White in 2024 (*Wave mean*): **78.5% / 21.5%** (81.6% / 18.4%)

Homeownership in 2024 (*Wave mean*): **56.7%** (55.8%)

Undergraduate or Postgraduate Education in 2024 (*Wave mean*): **35.0%** (32.7%)

Region (*Wave mean*): North East **4.6%** (4.2%)  
North West **11.6%** (11.3%)  
Yorkshire and the Humber **8.3%** (8.5%)  
East Midlands **6.7%** (7.5%)  
West Midlands **8.7%** (9.0%)  
East of England **8.6%** (9.6%)  
Greater London **17.9%** (13.5%)  
South East **13.8%** (14.1%)  
South West **8.0%** (8.8%)  
Wales **4.4%** (4.9%)  
Scotland **7.6%** (8.6%)

2024 Vote (*Result*): Labour: **36.9%** (33.7%)  
Conservative: **23.7%** (23.7%)  
Lib Dem: **12.7%** (12.2%)  
Reform: **12.5%** (14.3%)  
Green: **4.9%** (6.4%)  
SNP: **1.6%** (2.5%)  
Plaid: **0.6%** (0.7%)

# Endnotes



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<sup>1</sup> See Appendix for methodology of scenario seat share

<sup>2</sup> British Election Study, Face-to-face survey, 2005, 2010, 2015, 2017, 2019. [link](#)

<sup>3</sup> AB, C1, C2 and DE social grades are categories used in Approximated Social Grade census data, reflecting social status by occupation. C2 voters are those in “skilled manual occupations”; DE are “semi-skilled and unskilled manual occupations; unemployed and lowest grade occupations”. See Office for National Statistics, Approximated Social Grade Data, [link](#)

<sup>4</sup> These are seats that voted Labour in 2005 and Conservative in 2010

<sup>5</sup> See Appendix for methodology of scenario seat share

<sup>6</sup> Full list of Canadian polling firms: Abacus Data, Angus Reid, Discover by Navigator, EKOS, Innovative Research, Ipsos, Leger, Mainstreet Research, Nanos Research, Pallas Data, Pluriel Research, Pollara, Relay Strategies, Research Co, Spark Advocacy

Full list of polling firms from New Zealand: 1 News - Kantar Public, 1 News - Verian, Guardian Essential, Horizon Research, Newshub - Reid Research, Roy Morgan, Talbot Mills, Taxpayers' Union-Curia, The Post-Freshwater Strategy; Full list of German polling firms: Allensbach, Civey, Forsa, Forschungsgruppe Wahlen, GMS, Infratest dimap, INSA, Ipsos, Kantar, pollytix, Verian, Wahlkreisprognose, YouGov; Full list of polling firms from UK and Scotland: BMG, Deltapoll, FindOutNow/Electoral Calculus (MRP), Focaldata, Ipsos, JL Partners, Labour Together, Lord Ashcroft, More in Common, Norstat, Number Cruncher Politics, Opinium, Panelbase, PeoplePolling, Redfield & Wilton, Savanta, Survation, Techne, Verian, WeThink, Whitestone Insight, YouGov

Full list of Portugese polling firms: Aximage, CESOP-UCP, Domp, Eurosondagem, ICS, ISCTE, Metris, Intercampus, Pitagorcia, UCP-CESOP

<sup>7</sup> Data scraped from BMG, Deltapoll, FindOutNow/Electoral Calculus (MRP), Focaldata, Ipsos, JL Partners, Labour Together, Lord Ashcroft, More in Common, Norstat, Number Cruncher Politics, Opinium, Panelbase, PeoplePolling, Redfield & Wilton, Savanta, Techne, Verian, We Think, Whitestone Insight, YouGov

<sup>8</sup> YouGov Government approval tracker, [link](#)

<sup>9</sup> YouGov, Is the Conservative Party competent or incompetent? Tracker, [link](#)

<sup>10</sup> YouGov, Is the Conservative Party trustworthy or untrustworthy? Tracker, [link](#)

<sup>11</sup> Ipsos Political Monitor Satisfaction Ratings, 1997-present, [link](#)

<sup>12</sup> All voting intention data over time has been smoothed using a moving average curve

<sup>13</sup> Net Migration to the UK, Migration Observatory, [link](#)

<sup>14</sup> Lord Ashcroft (2005), LordAshcroft.com, [link](#), Left Home: The Myth of Tory Abstentions in the Election of 1997, Centre for Policy Studies, [link](#)

<sup>15</sup> Johnston, R. and Pattie, C. (2011), "The British general election of 2010: a three-party contest-or three two-party contests?", The Geographical Journal 177.1 (2011): 17-26, [link](#)

<sup>16</sup> YouGov, The most important issues facing the country tracker, [link](#)

<sup>17</sup> YouGov Voting Intention, 20 April 2017, [link](#)

<sup>18</sup> The 2017 General Election result, UK in a Changing Europe, 24 April 2020, [link](#)

<sup>19</sup> This type of trade-off data gives a better sense of where to focus to become more appealing, as it gives a picture of prioritisation as well as agreement versus disagreement, and can reveal areas of consensus and division.

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