

Breaking Blue

Understanding the Conservatives' once-in-a-century loss



ONWARD 

 FOCALDATA

What is this project about?

Onward and Focaldata conducted three polls from May – June 2024 to understand voters attitudes towards the Conservative party. We used this data to diagnose the Conservative losses in the 2024 general election and define what the Party must do to rebuild.

Foundational poll:

Sample: 10,119 respondents
Fieldwork: 10th – 28th May, 2024

Mega poll:

Sample: 52,907 respondents
Fieldwork: 20th May – 28th June, 2024

Kick-off poll:

Sample: 4,096 respondents
Fieldwork: 25th – 30th May, 2024

Summary analysis of 2024 election loss

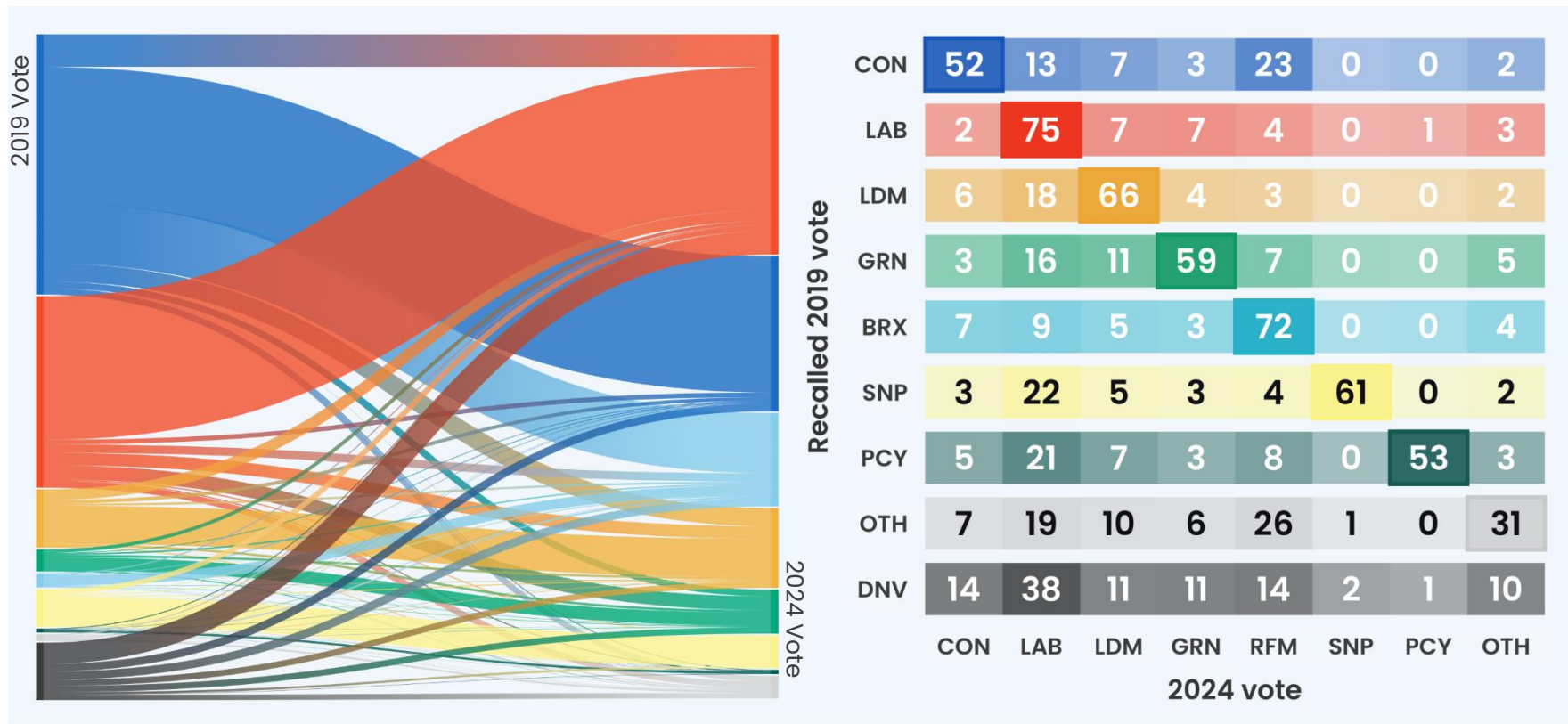
1. The Conservatives suffered a catastrophic defeat with losses in every direction, thanks to a four-way pincer movement on age, income, geography and Brexit preference.
2. A set of "super-demographics" – voters who might be some or all of the markers of being over 65, Brexit-supporting, homeowners, living outside of cities and C2 – explain a large cohort of voters who overwhelmingly backed the Conservatives in 2019 but defected in 2024.
3. Like many countries post-pandemic, the Conservatives were hit a major anti-incumbency vote, but suffered more thanks to a collapse in Conservative competence that destroyed trust.
4. In rebuilding, the Conservatives should focus first on winning back some proportion of Reform and Liberal Democrats supporters simultaneously. These defectors are the most likely to vote Conservative, dislike Keir Starmer, and are closer in economic beliefs and demographically to remaining Conservative voters.
5. Immigration, the NHS and restoring economic competence are the key issues to winning back all defectors.

Losses in every direction



The Conservatives retained just half of the 2019 voters

Voter flows from 2019 to 2024

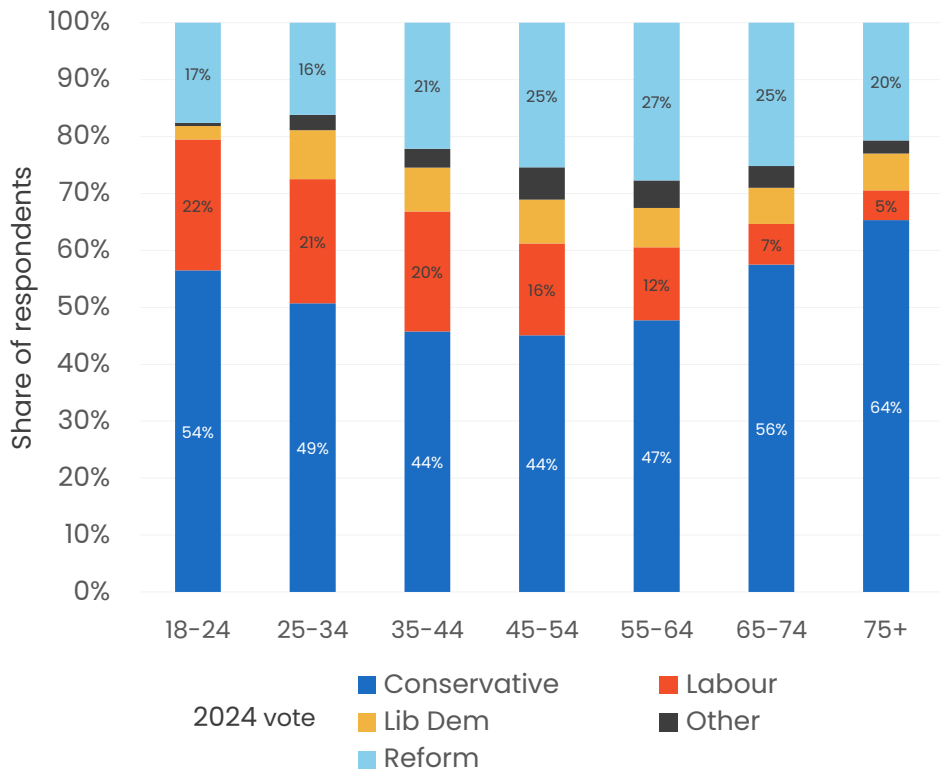


The four-way pincer movement that damaged the Conservatives

- The Conservative Party suffered a catastrophic loss at the 2024 general election, losing 251 seats and a vote share of just 24%.
- It marked a once-in-a-century defeat for the party, which returned just 121 MPs – the lowest seat tally in its history.
- The defeat was especially marked due to the four-way pincer movement that annihilated its vote since the 2019 result.
- On four markers – age, income, geography, and Brexit preference – the party's support base was broken up between different parties and by tactical voting patterns.

Pincer one: Age

2019 Conservative voters: Party voted for in 2024 by age



Voters who abandoned the Conservatives in 2024 opted for different parties based on their age.

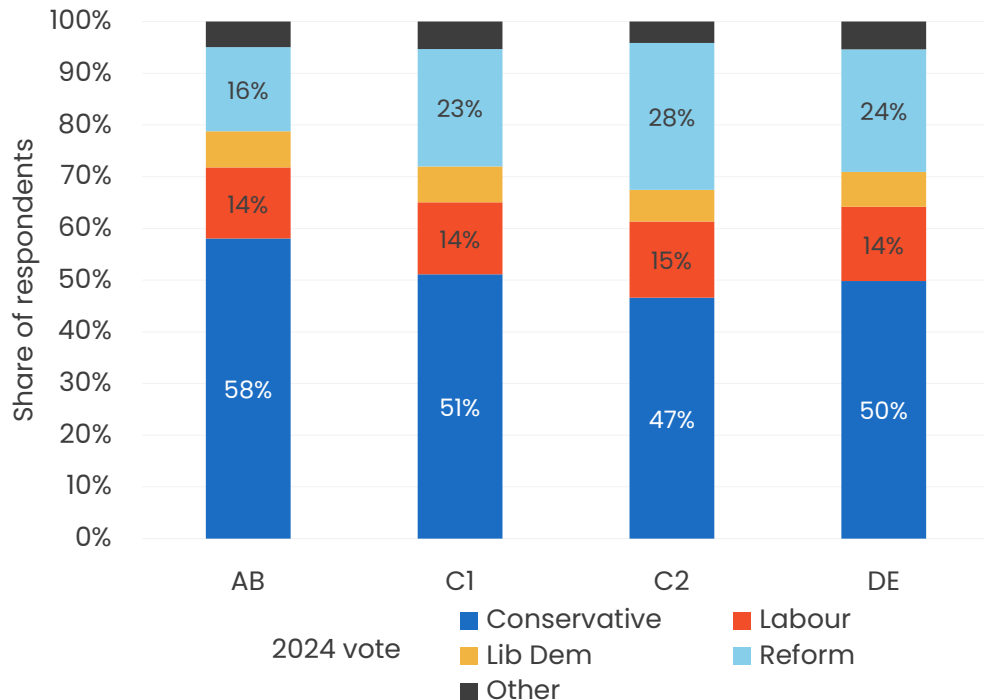
Younger 2019 Conservatives were more likely to defect to the Labour Party. But these supporters made up a smaller part of the Tory base.

The oldest 2019 Conservative voters were least likely to defect, but on a volume basis, it mattered the most.

45-74-year-olds were most likely to defect to Reform UK.

Pincer two: Income

2019 Conservative voters: Party voted for in 2024 by social grade



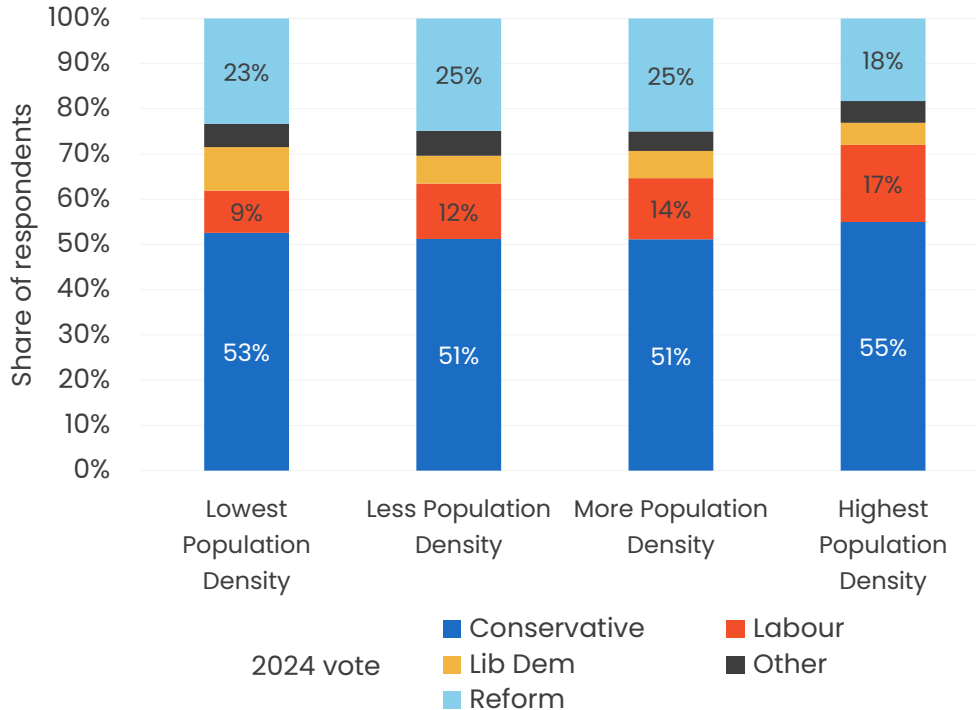
Different occupation and income brackets showed the Conservative vote splitting to different parties.

Defection rates were highest among C2 voters, who chiefly went to Reform.

In seat terms, Liberal Democrat gains were made disproportionately in high income areas. Labour's were in lower income areas.

Pincer three: Geography

2019 Conservatives: Defection rate by constituency population density quartiles



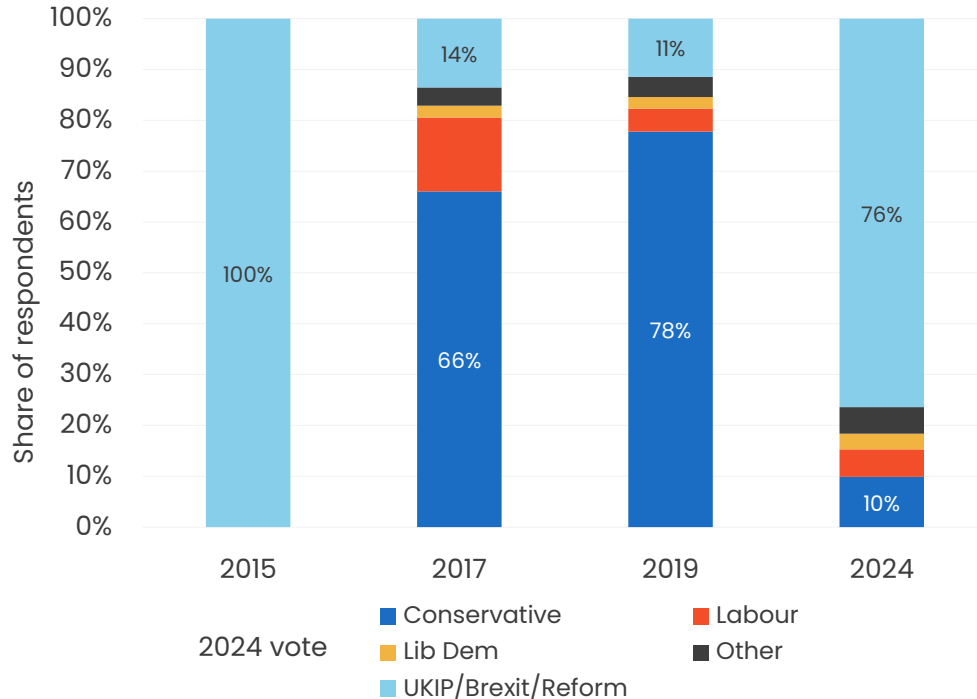
Among 2019 Conservative voters, defection rates were similar across constituency density.

In places with higher population density, the defectors were more likely to go to Labour.

But defections were more likely to vote Labour in denser areas.

Pincer four: Brexit preference – Leavers

Voting behaviour of those who voted UKIP in 2015 and Leave in 2016



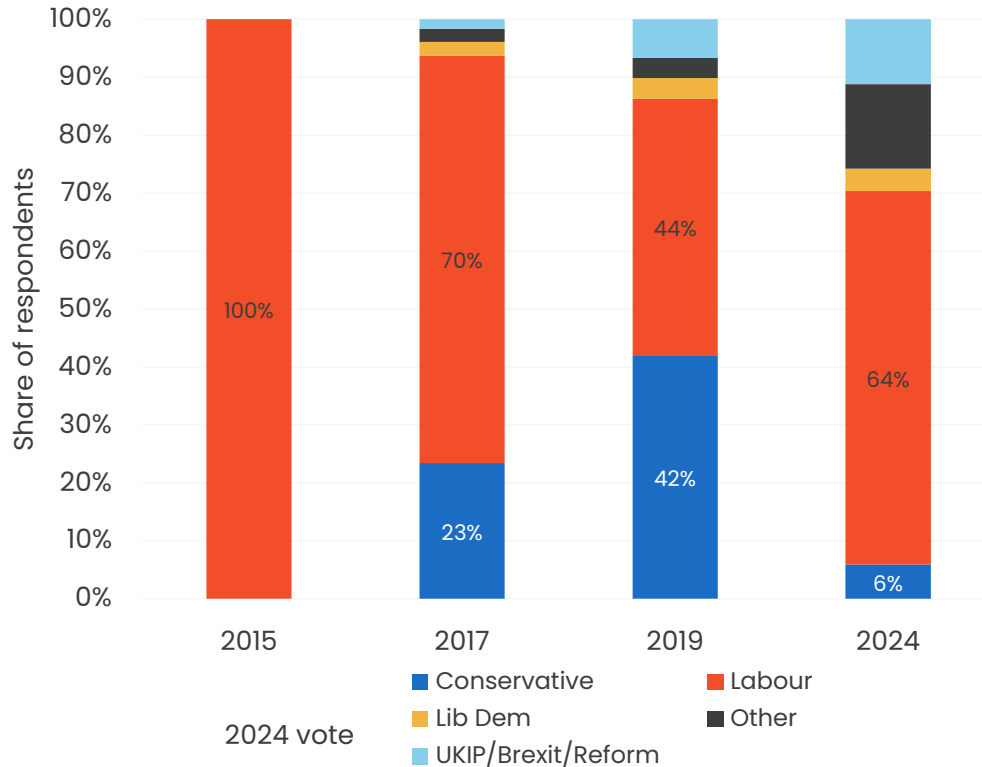
Nigel Farage's army are those who voted UKIP in 2015 and Leave in 2016.

They defected to the Conservatives in 2017 and 2019 in significant numbers, but returned to Reform in 2024.

Their share of the Conservative vote collapsed to only 10% in the 2024 election.

Pincer four: Brexit preference – Leavers

Voting behaviour of those who voted Labour in 2015 and Leave in 2016



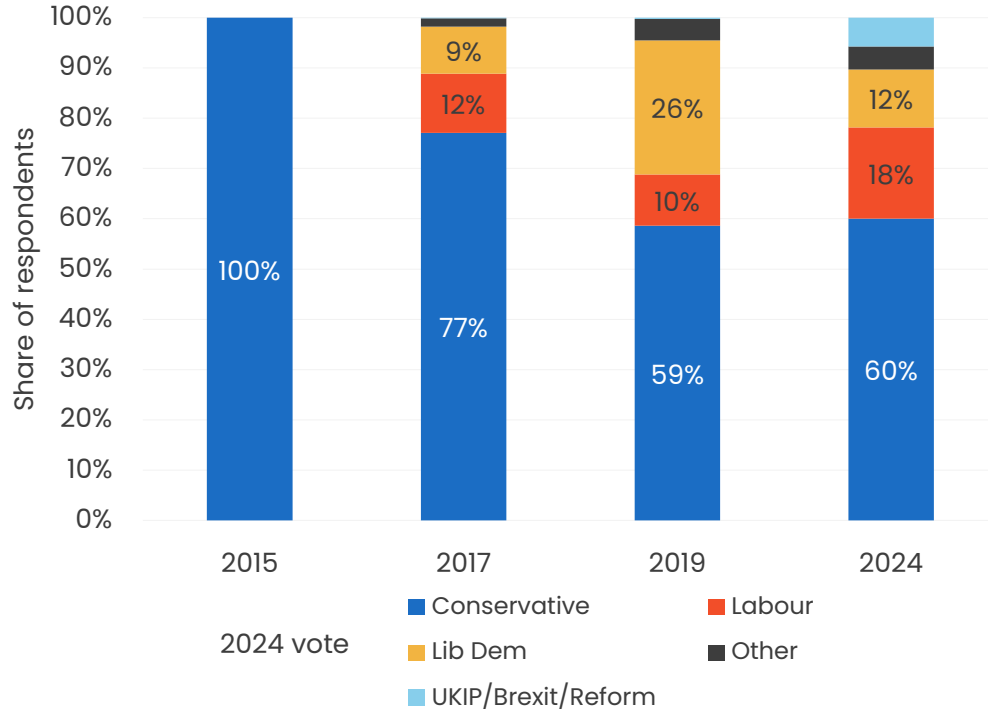
Labour Leavers are those who voted Labour 2015 and for Brexit in 2016.

They became more Conservative in 2017 and 2019 but returned to Labour in significant numbers.

Among this group, the Conservative vote share dropped to 6% in 2024.

Pincer four: Brexit preference – Remainers

Voting behaviour of those who voted Conservative in 2015 and Remain in 2016



Conservative Remainers are those who voted Tory in 2015 and Remain 2016.

This group became less Conservative in 2017 but held steady between 2019 and 2024.

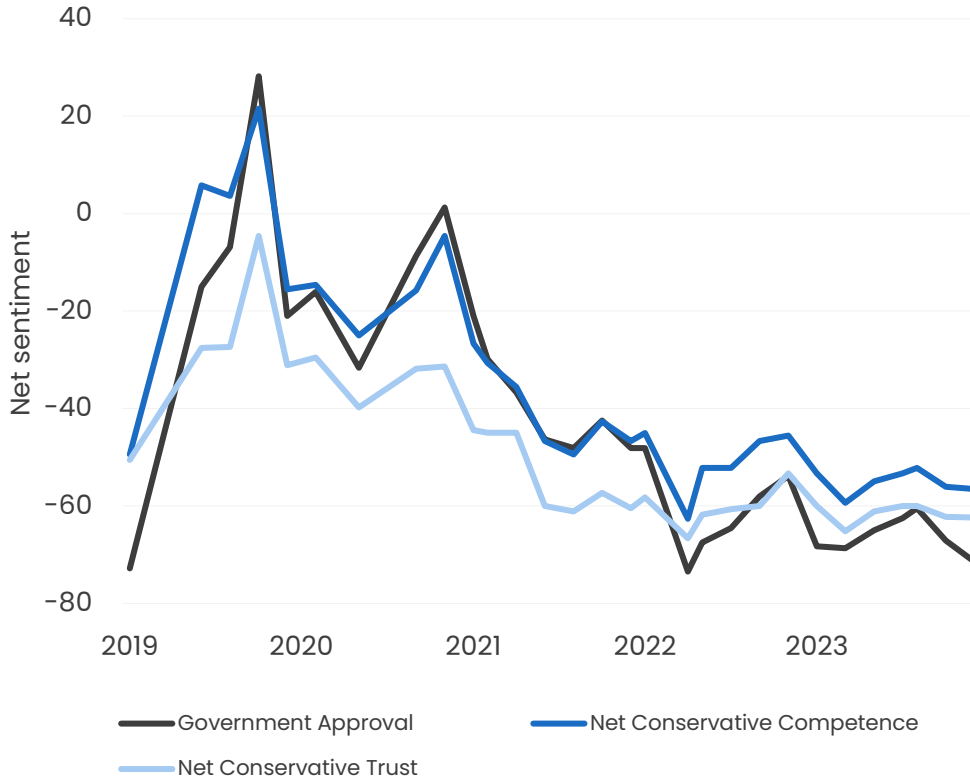
But their non-Conservative choice became more split in 2024 between Labour and the Lib Dems.

Anti-incumbency and incompetency



The Covid-19 pandemic downturn

Public perception of trust and competence in Government, 2019–23



The Covid-19 pandemic had a negative effect on the Conservative Party's reputation for governance.

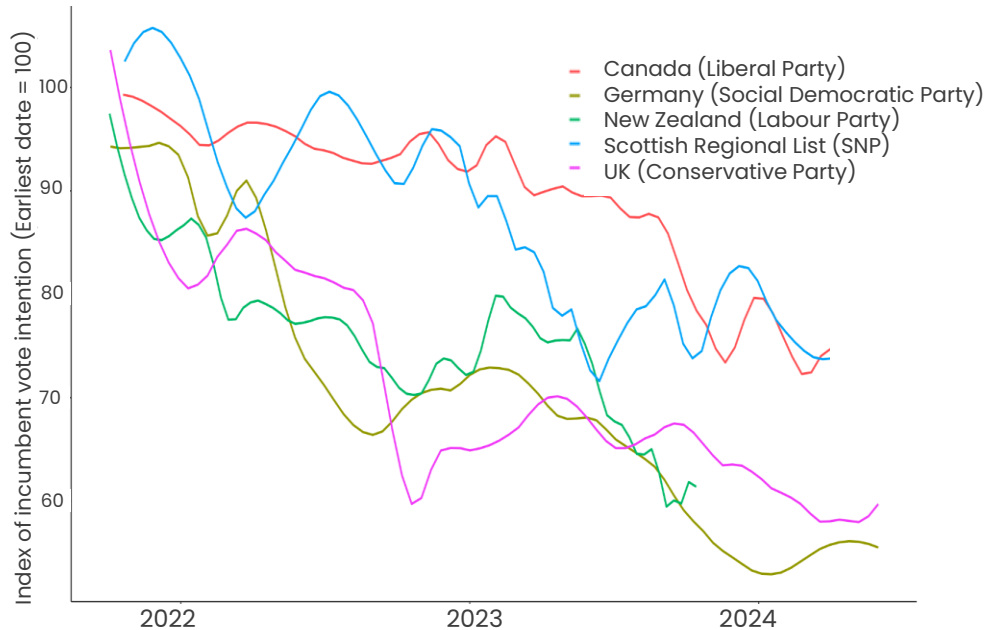
Among all voters, the party's net approval, perception of competence and trustworthiness ratings declined substantially.

The party and government received two significant boosts with the initial pandemic handling, followed by the vaccine roll out.

The government's approach ratings and competence levels moved in lockstep with each other.

Anti-incumbency goes beyond the UK

Indexed incumbent vote intention since October 2021



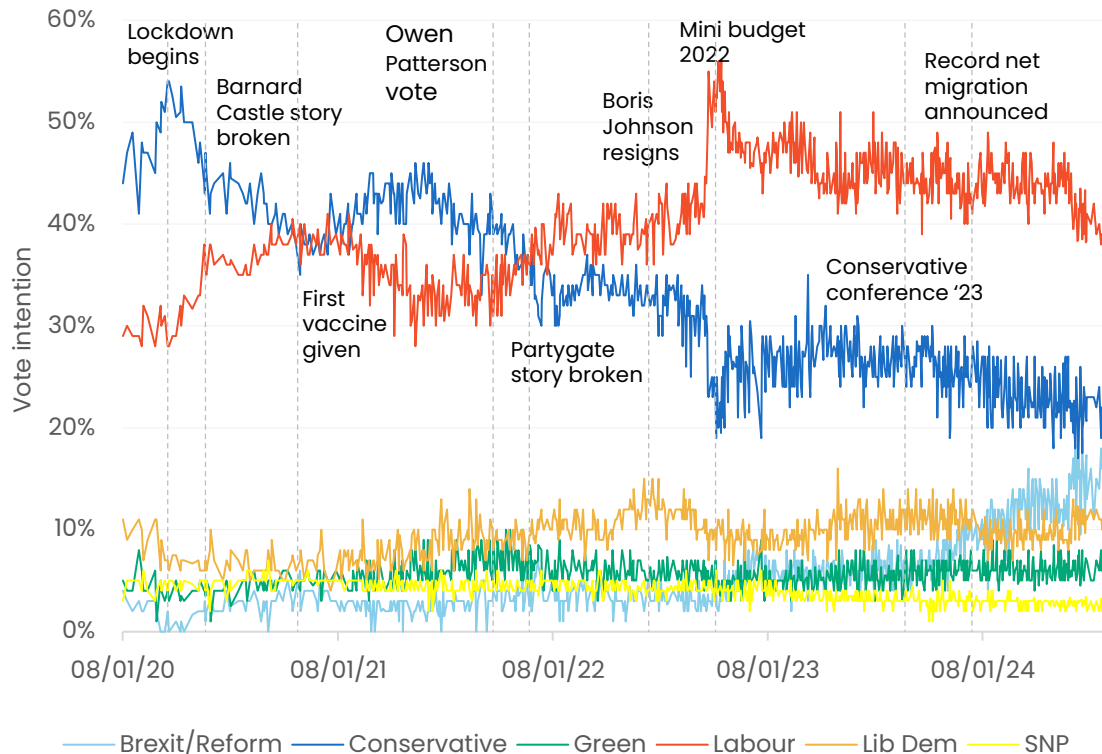
Since the end of lockdowns, an anti-incumbency effect has been a worldwide phenomenon.

In Canada, Germany, New Zealand and Scotland, incumbent governments have suffered significant declines in their voting intentions.

But the British Conservative government suffered one of the worst declines.

There were UK-specific events

Vote intention among all voters, 2020 – 2024



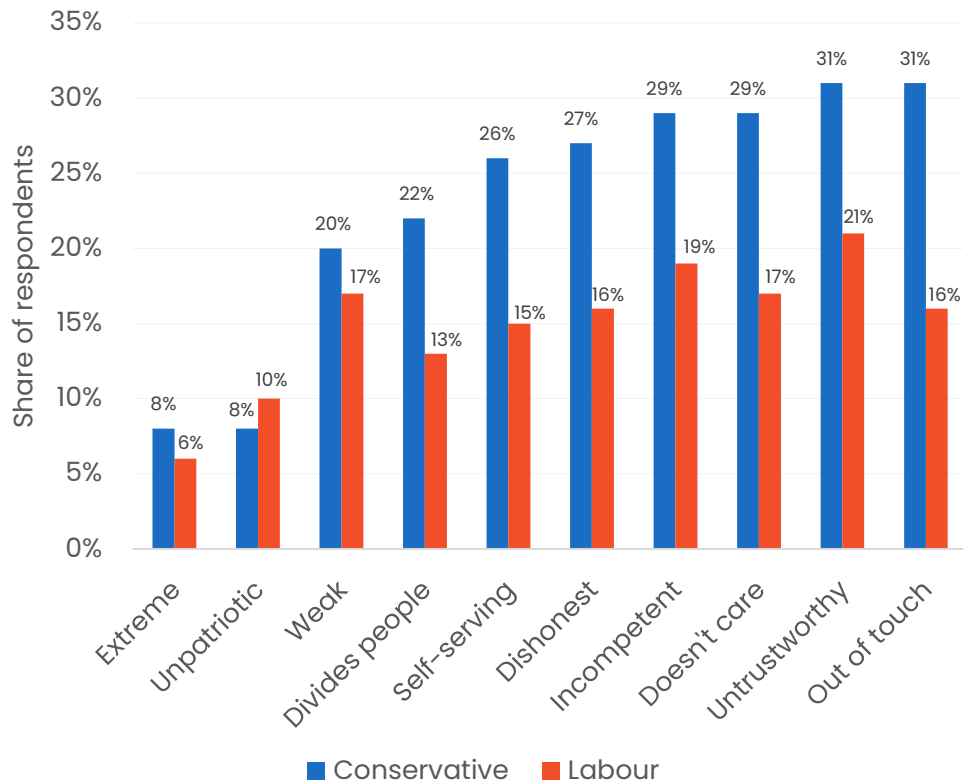
Although there is an international trend, some clear UK-specific events impacted the Conservative party's standing.

The Partygate scandal had a negative effect on the Conservatives' voting intentions, marking the start of a downward decline.

Other UK-specific events drove further rapid decreases in the Conservative Party's support – including Liz Truss' mini-budget.

The destruction of Conservative competence

Negative traits assigned to different parties



Perceptions of the Conservative Party's ability to govern were destroyed.

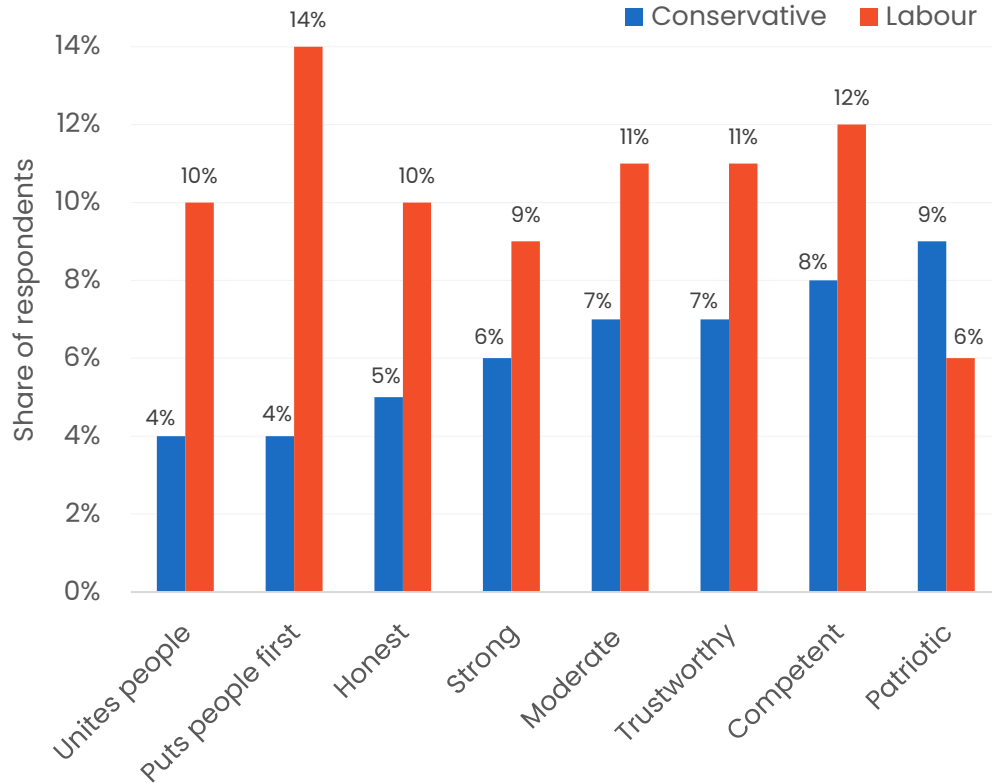
By the time the election was called, the Conservatives were ahead of Labour on all but one negative perception.

The Conservatives were 15 percentage points behind Labour on being out of touch.

The only value that the Conservatives ranked ahead of Labour was being patriotic.

Labour was far ahead on positive traits

Positive traits assigned to different parties



Whereas the Conservatives had a deficit on positive values, Labour had strong support.

When the 2024 election was called, Labour was ranked ahead on positive attributes such as competence.

Some of the gaps were significant, with Labour 10 percentage points ahead on putting people first.

Super-demographics



Which are the super-demographics?

- There is a large, significant cohort of voters who abandoned the Conservatives since the 2019 election that is crucial for understanding the loss.
- These are 'super-demographics', the traits that are a big predictor of the Conservative supporters in 2019 and beyond. This group was the Conservative core voter.
- What are the indicators? They are older — aged 65+. They are Brexit-supporting outright homeowners. They are far less likely to live in dense urban areas and are more likely to be in the C2 socio economic group. They are less likely to have a degree.
- Winning back these 'super-demographics' must be the first step in rebuilding the party.

Which are the super-demographics? Age and home ownership

Share of each subcategory that voted Conservative in 2019 and 2024

Homeowner	2019	2024	Change
Owns outright	56%	31%	- 25%
Owns with mortgage or shared	40%	18%	- 21%
Private rented or rent free	34%	15%	- 19%
Social rented	33%	13%	- 21%
Age			
18 to 24	24%	11%	- 13%
25 to 34	27%	14%	- 13%
35 to 44	33%	15%	- 18%
45 to 54	42%	18%	- 24%
55 to 64	50%	22%	- 27%
65 to 74	59%	33%	- 26%
75 +	66%	43%	- 23%

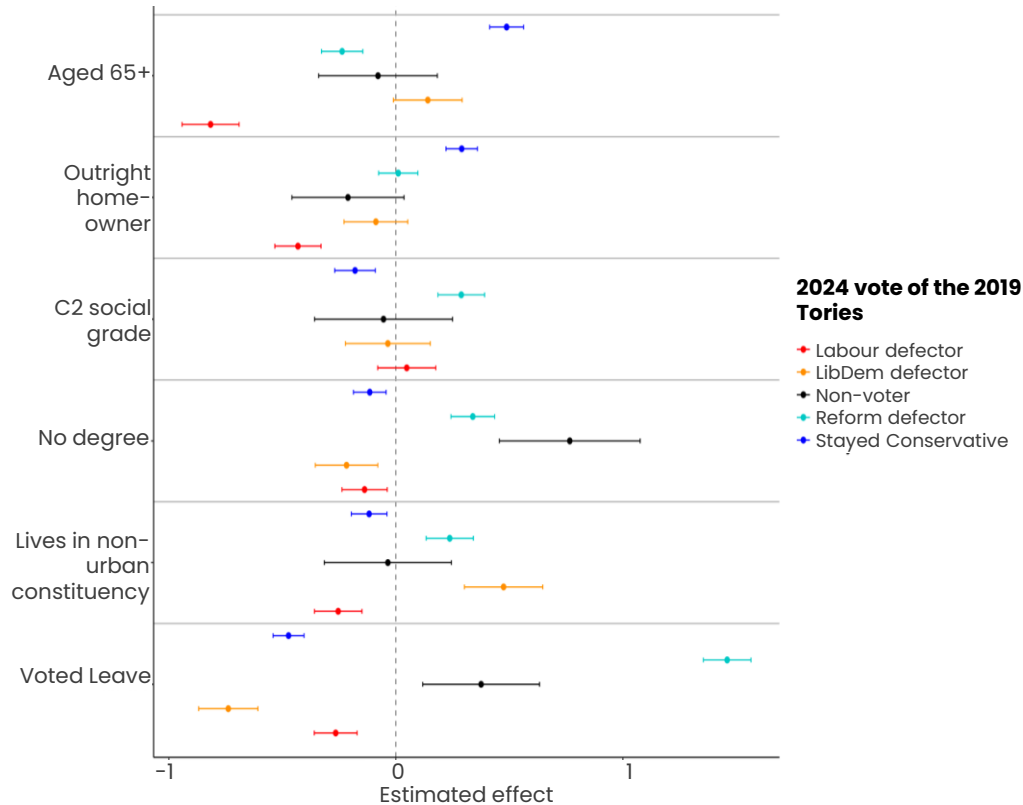
Which are the super-demographics? Income, education, and Brexit

Share of each subcategory that voted Conservative in 2019 and 2024

Social Grade	2019	2024	Change
AB	45%	25%	20%
C1	45%	21%	24%
C2	46%	19%	28%
DE	41%	16%	24%
Education			
High	38%	21%	-17%
Low	49%	22%	-27%
EU Referendum			
Don't Know	27%	13%	-14%
Didn't Vote	28%	12%	-16%
Leave	67%	31%	-36%
Remain	28%	19%	-1%

Where did the super-demographics go in 2024?

2019 Conservatives: Super-demographic predictors of vote switching



Out of the Conservative Party's 2019 voters in the super-demographics, the voters split in different directions.

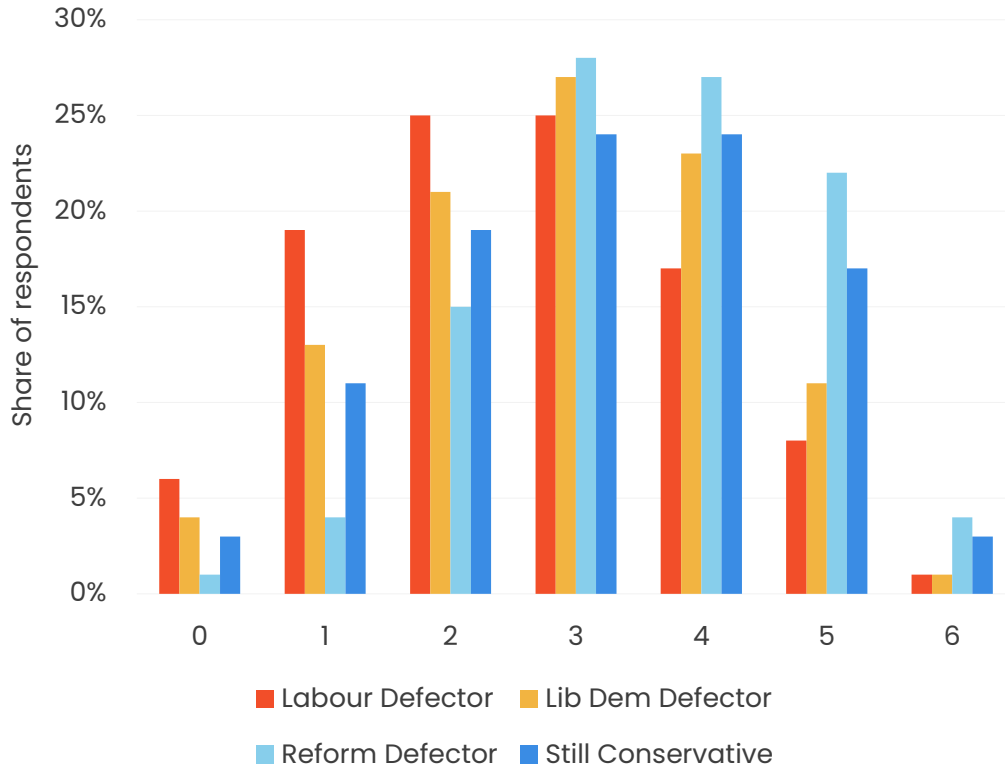
Older voters were more likely to stay with the Conservatives or defect to Reform.

Those with no degree were more likely to not vote or back Reform.

Leave voters were more likely to defect to the Reform.

How many super-demographics do people have?

2019 Conservatives: Number of super-demographics



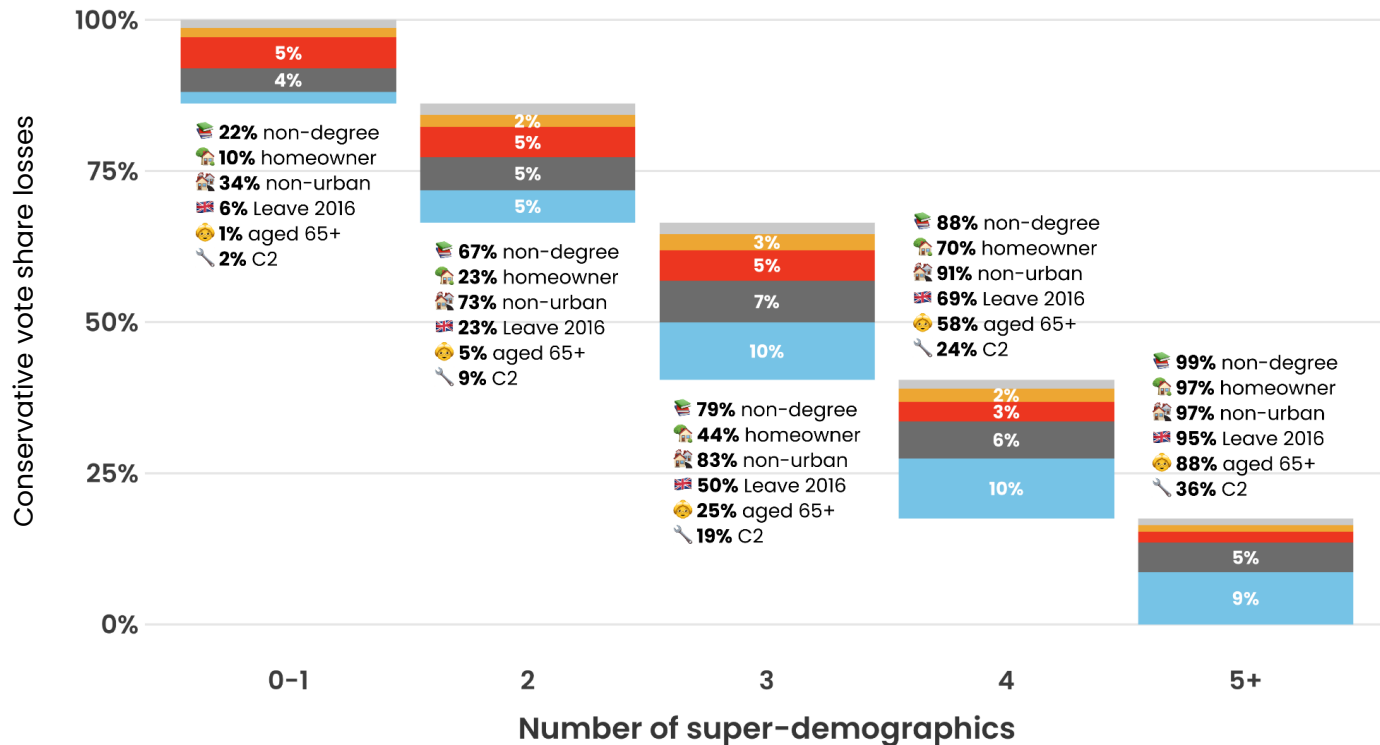
Reform voters attracted the most voters matching the super-demographics that are key to the Conservatives 2019 coalition.

Some 80% of Reform defectors have three or more of these characteristics, while a majority (62%) of Liberal Democrat defectors also share three or more.

This is why both these groups of defectors are more similar to remaining Conservative voters, and should be the party's first target.

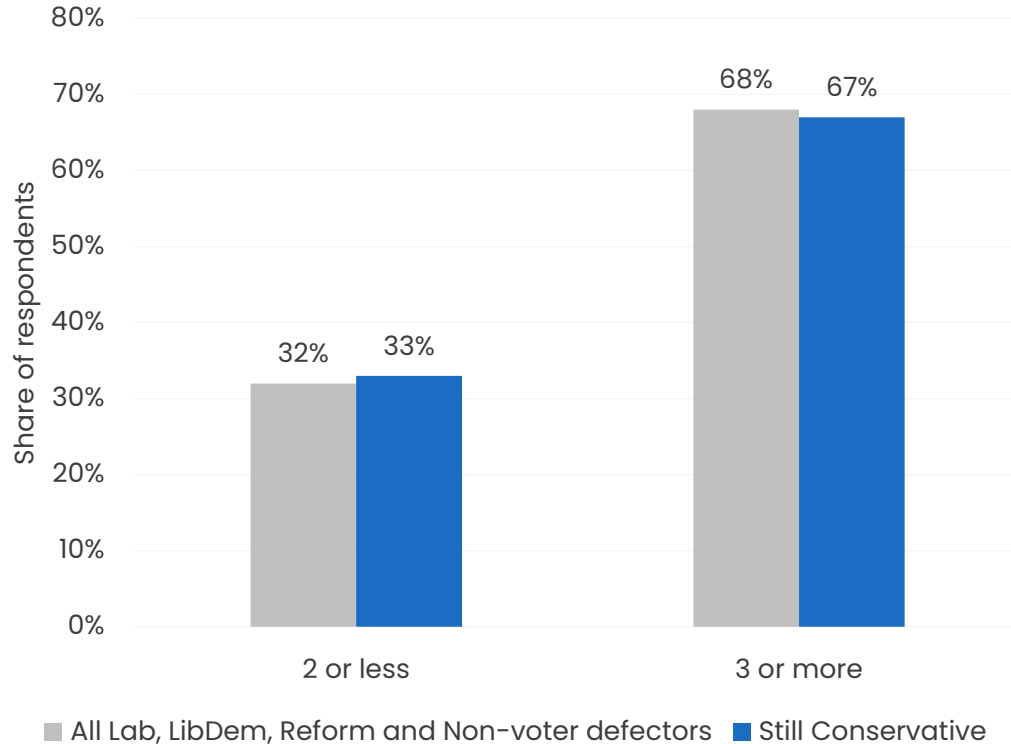
Conservative losses across the super-demographics

Over 80% of Conservative vote losses were driven by people with 2 or more super-demographics and over half were driven by those with 3 or more.



How many super-demographics do people have?

2019 Conservatives: Number of super-demographics

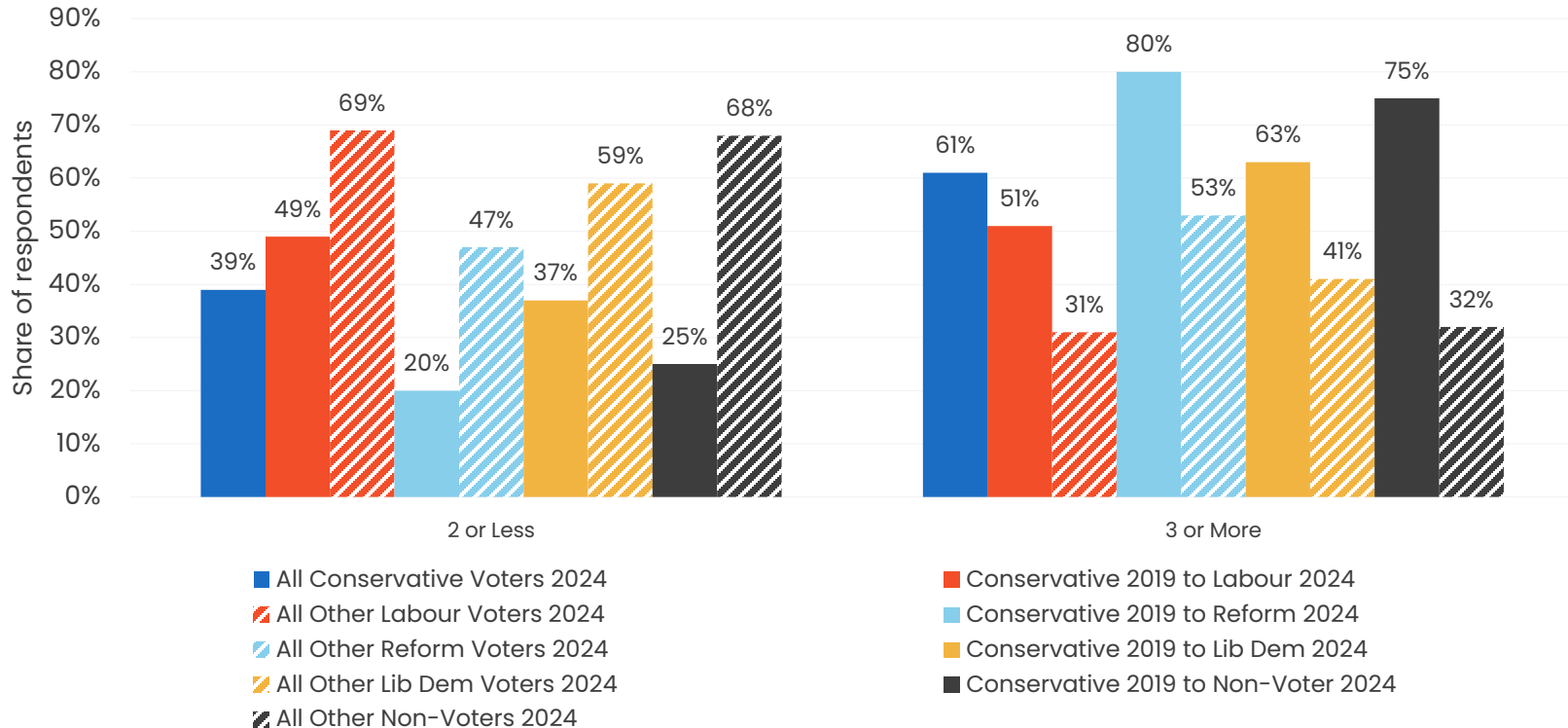


The super-demographics split equally between those who voted Conservative in 2024 and those who defected to other parties.

Almost equal numbers of Conservative and non-Conservative had three or more characteristics.

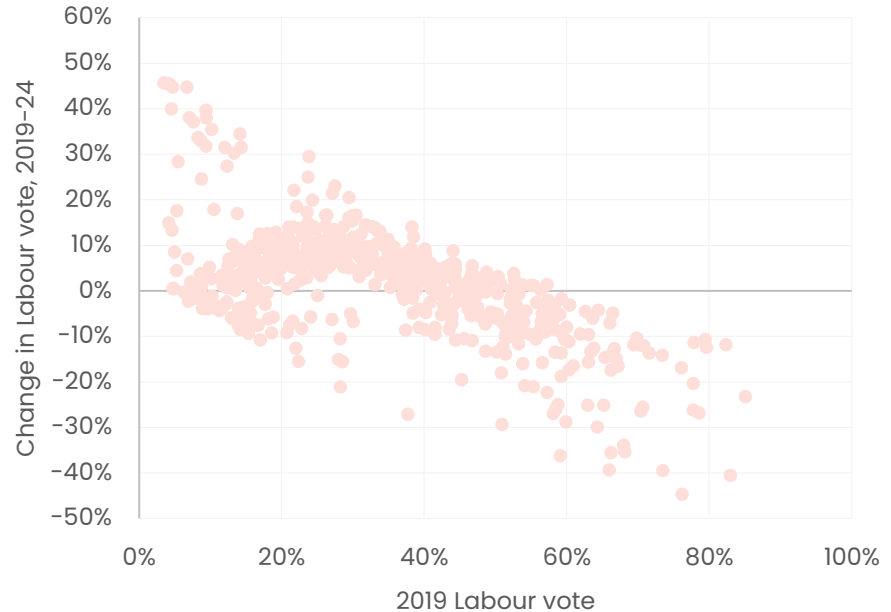
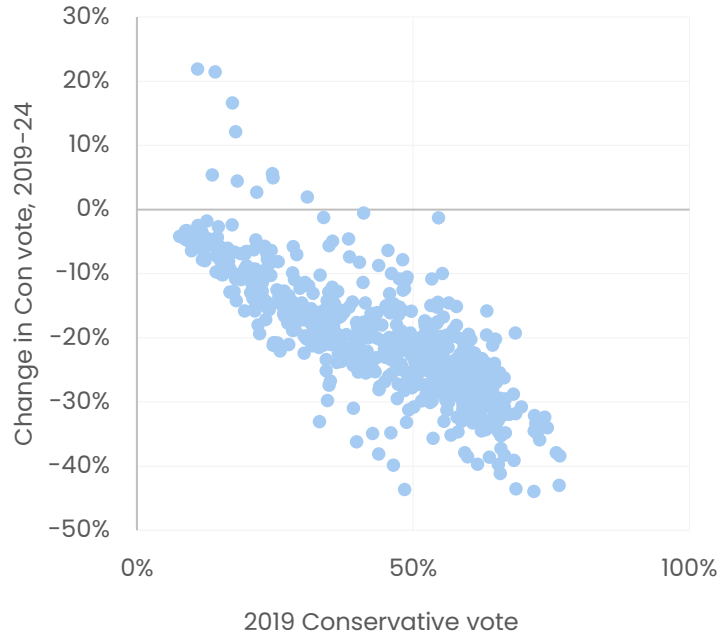
Defectors are more similar to the current Conservative Party than the end destination.

2019 Conservatives: Number of super-demographics



The 2024 Conservative losses were proportional

Defections from voters among these super demographics led to the devastating proportional swing which reduced the Conservative vote in the places where it had been traditionally strongest.



LibDem and Reform defectors

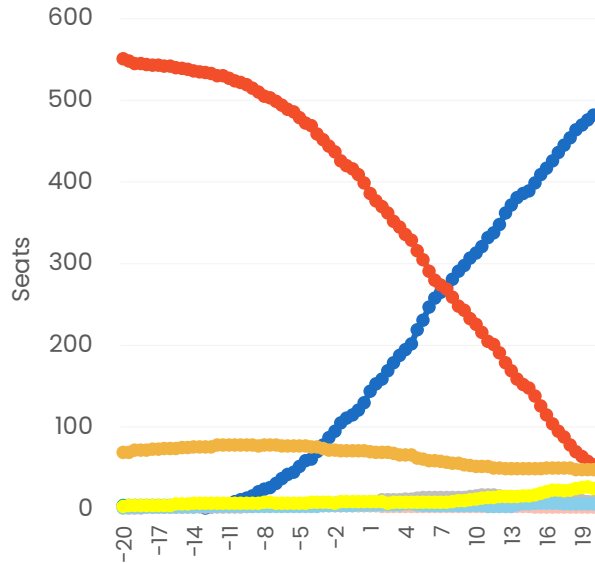
The first port of call



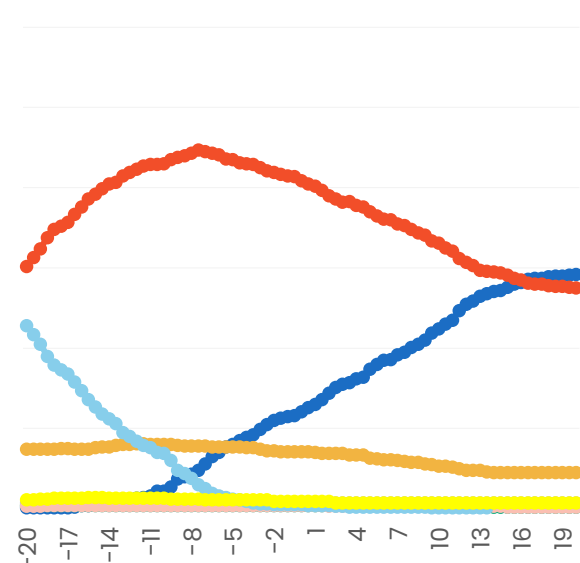
Winning back Labour voters yields greater results...

It is more electorally efficient for the Conservatives to focus on winning Labour voters...

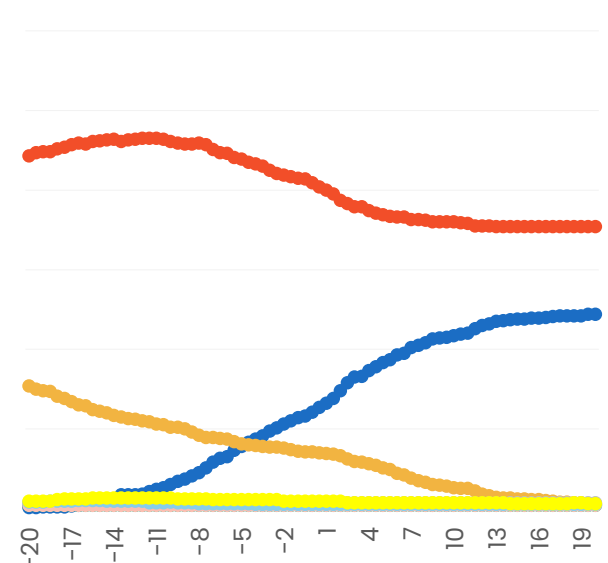
Going to/from Labour



Going to/from Reform



Going to/from Lib Dems



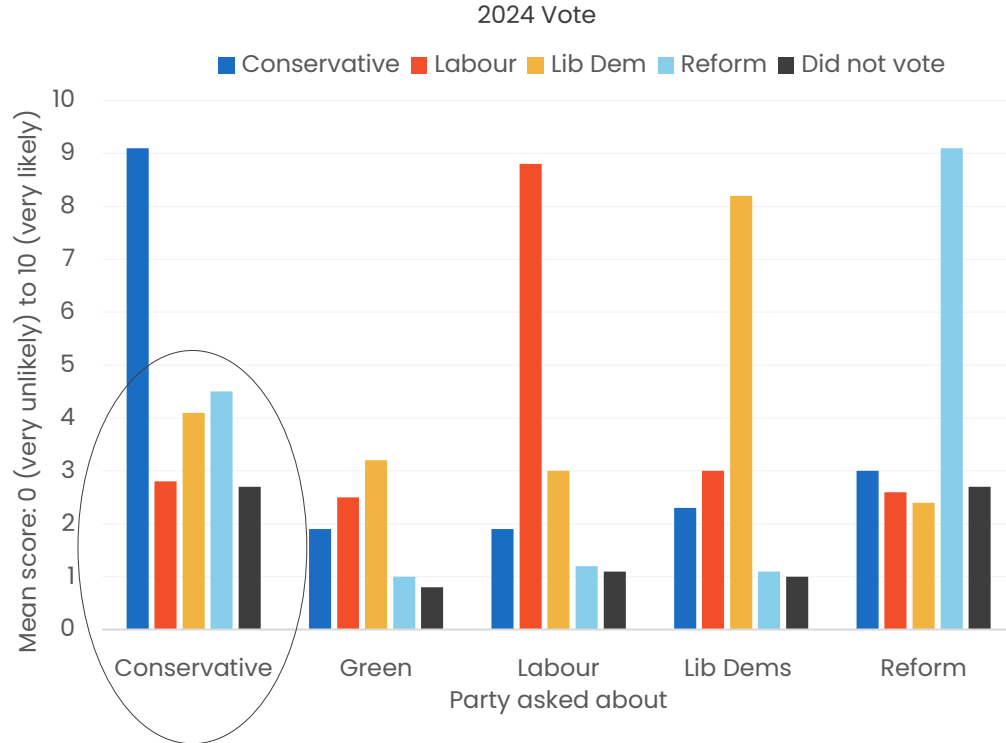
Conservative Green Labour Lib Dem Other Plaid Reform SNP

...But

- But given how far behind the Conservatives are, it would require a much larger swing to begin winning any of these seats back.
- Based on 2024 result by constituency, it would need a 15% swing from Labour for win a majority.
- The best route for the Conservatives is to focus on winning back Reform or Liberal Democrats.

Labour defectors really don't like the Conservatives

2019 Conservatives: How likely is it that you would ever vote for the following parties?



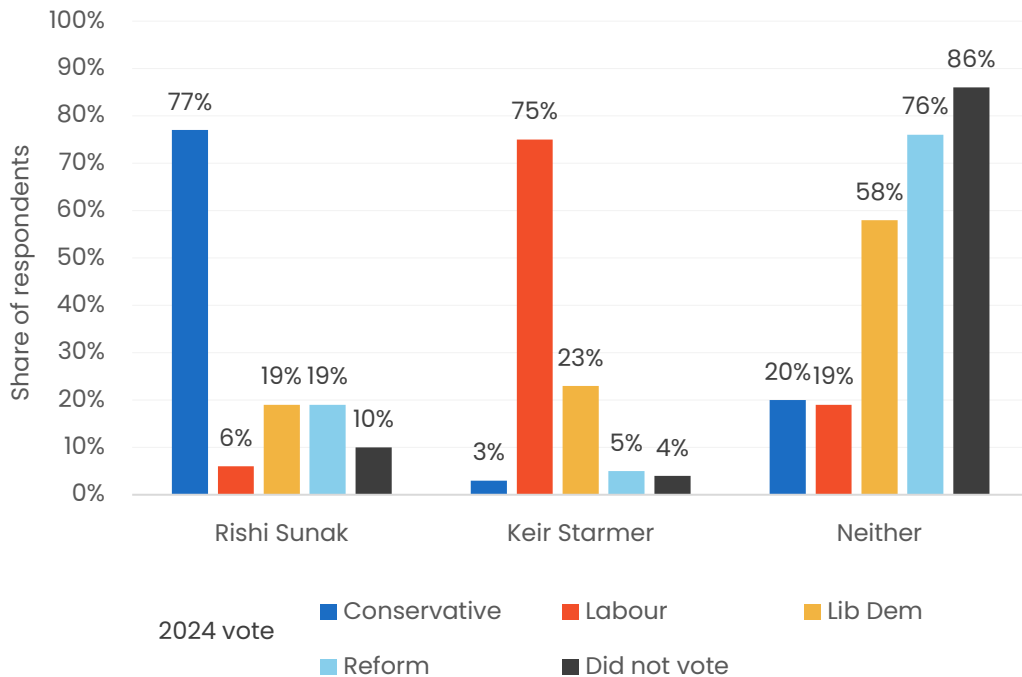
Voters that the Conservatives lost in 2024 have different views on whether they would return to the party.

Labour defectors are much less willing to contemplate voting Conservative in the future compared to Reform and Lib Dem defectors.

The biggest prize – Labour defectors – is therefore the most difficult to win.

The defectors who don't like Starmer

2019 Conservatives: Who do you think will make the best Prime Minister?



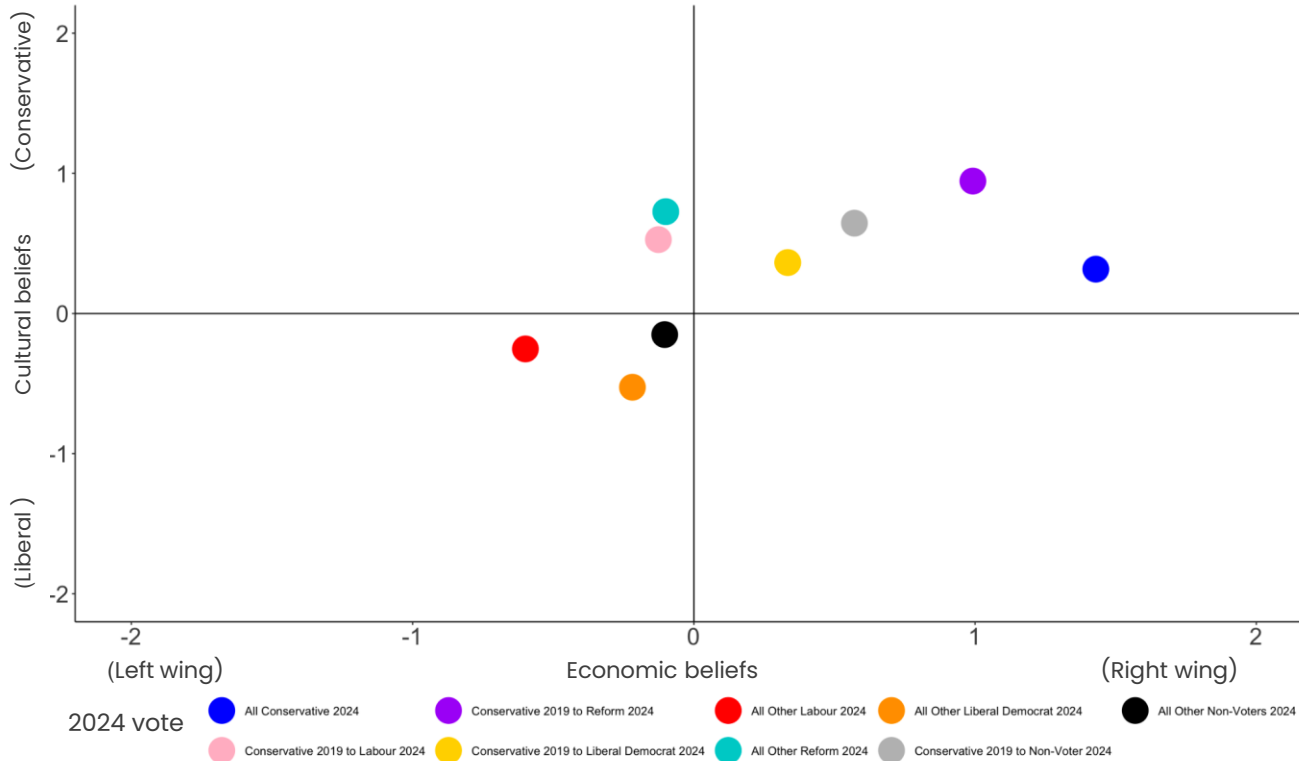
The Conservative defectors who did not vote Labour did not like Keir Starmer.

When asked who would make the best Prime Minister, the most popular answer for Liberal Democrat, Reform and non-voters was "Neither."

Therefore it is Liberal Democrat and Reform defectors that the Conservatives should target first.

Liberal Democrat and Reform voters aren't so different

Economic and cultural beliefs of all defector groups

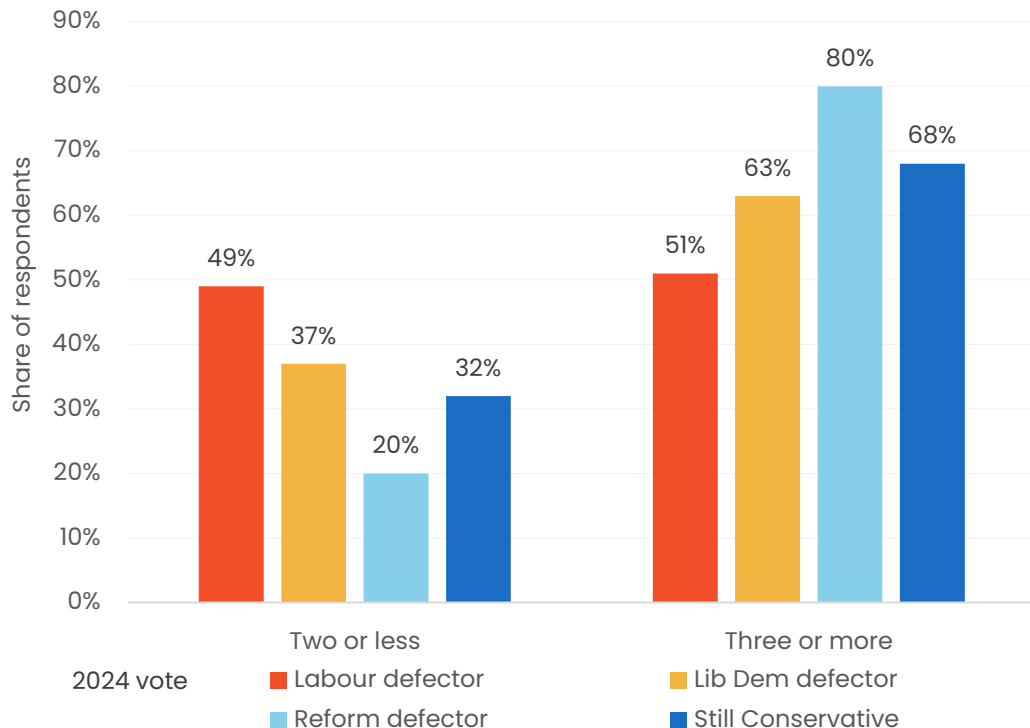


Reform and Liberal Democrat defectors have different economic and cultural beliefs.

But despite their differences they remain closest to the remaining Conservative voters.

Liberal and Reform defectors are more similar to the Conservatives than Labour

2019 Conservatives: Number of super-demographics



Reform and Liberal Democrat defectors have different economic and cultural beliefs.

But supporters of both parties have two or three characteristics from the super-demographics.

Priorities for rebuilding



The predictors of Conservative supporters

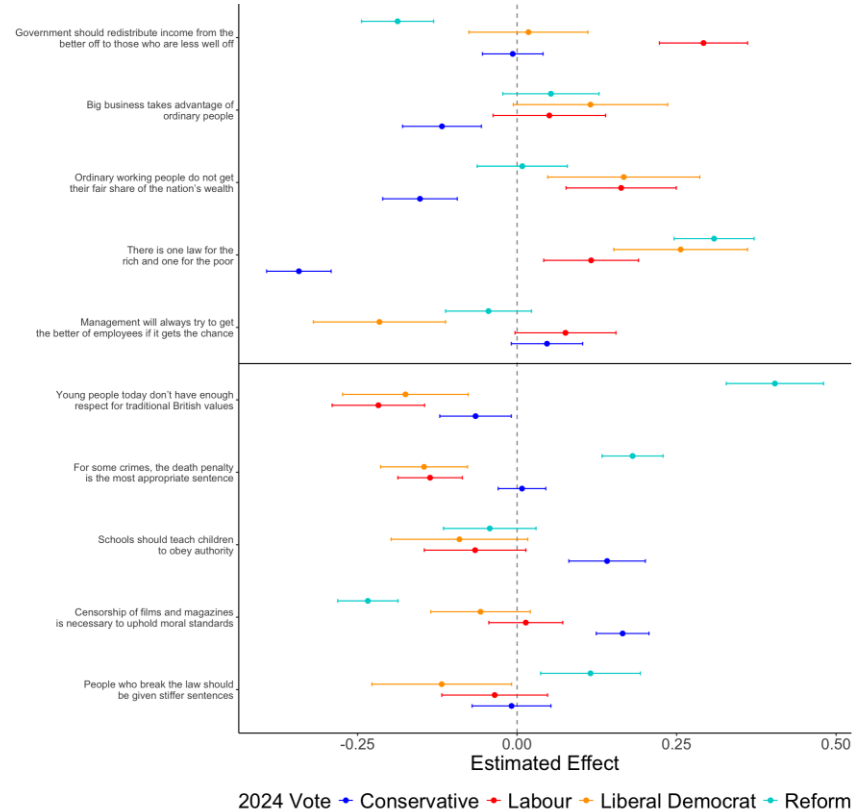
The significant predictors of staying with the Conservatives tend to be the economic statements where Conservatives disagree.

The significant predictors of moving to Labour also tend to be the economic statements but here the defectors tend to agree.

The significant predictors of moving to Reform are the non-economic statements where they strongly agree that young people do not respect traditional values enough.

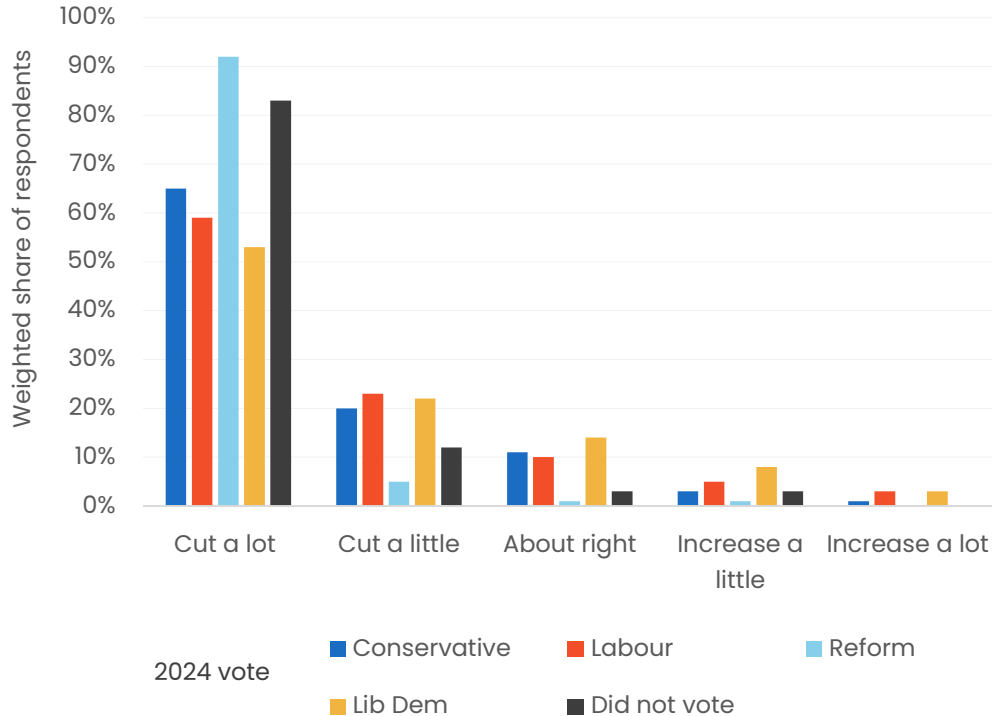
The significant predictors of moving to the Lib Dems tend to be the non-economic statements where they disagree with young people not having enough respect for traditional values and the death penalty.

2019 Conservatives: Predictors of vote switching



Policy priority – cut immigration

2019 Conservatives: Which of these best reflects your view on the level of immigration in the United Kingdom?



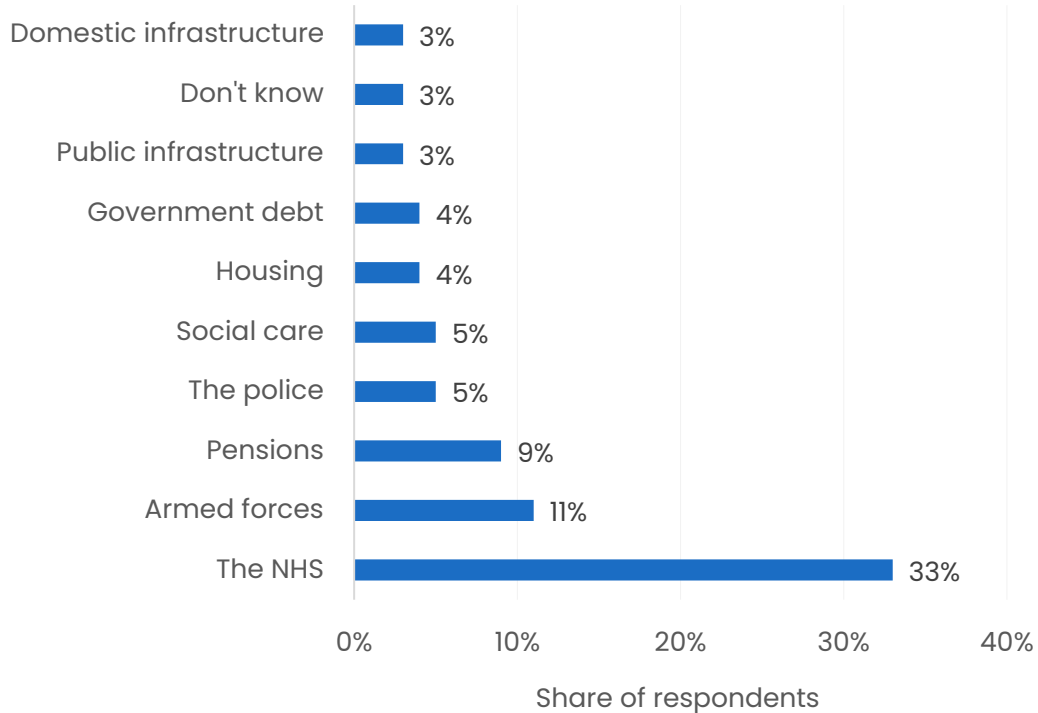
Despite their different social and economic values, a majority of all 2019 Conservative voters want immigration cut “a lot.”

Reform defectors are the most in favour of cutting migration, followed by current Conservative supporters.

However, Liberal Democrat defectors are not necessarily “liberal,” and the majority also favour cuts.

Policy priority – NHS

2019 Conservatives: What area of government spending would you be most supportive of increasing?



Among the 2019 Conservative voters, the most frequent is the NHS.

Other areas, such as the armed forces and pensions, rank far behind the health service.

Policy priority – NHS

The NHS ranks the most popular among all defectors – including Reform and Liberal Democrats.

The most popular choices for government spending, by defector group

