Implosion in Blue: A Year of Conservative Decline

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1. Introduction

In 2019, the Conservative Party won its first landslide victory since the Thatcher years, securing a majority of 80 seats and taking 44% of the popular vote. With a unique blend of social conservatism, fiscal liberalism and Brexit promises, Boris Johnson delivered the majority needed to take the country out of its Brexit deadlocks and "level-up" the rest of the country. The intervening years, between the 2019 election victory and the collapse of the Johnson administration with partygate, were marred by both self-made and external crises.

Now, that electoral coalition has imploded. Between the fall of a disgraced Johnson, the debacle that was the Truss administration's mini-budget, and the bungled attempts of Sunak to steady the ship, the Conservative vote is in its weakest state yet. **Critically, Conservative 2019 vote retention is now at an even lower level than after Liz Truss' mini-budget last autumn.**

This report studies the last 12-18 months of public polling data, as well as internal polling numbers, to uncover the state of public opinion as we enter a pivotal election year. By interrogating the party-to-party vote shares[1] from July 2022 to November 2023 this report uncovers some of the factors that have driven 2019 Conservative voters from the party back to the right and over to the left. Further, by studying how vote shares have changed on a regional scale since the beginning of 2023 this report is able to identify the regions where the attrition rate is the greatest. Many of the trends displayed in this report seem to be endemic – the Conservatives will need to move a mountain to change the state they are in.

2. Methodology

This report uses a combination of data from nine polling houses[2], including J.L. Partners in order to assess party-to-party movement since July 2022. The regional plots are based on three polling firms' data, namely Deltapoll, Opinium and YouGov, and extend from the start of 2023 until the end of November 2023. The use of multiple polling firms is required in order to account for the variation in methods used by the various companies, as well as differences in panel data and vote intention definitions[3].

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[1] Party to party vote shares are defined as the percentage of people who voted for party A in the 2019 general election who now say they intend to vote for party B.
[2] These polling firms are Deltapoll, More in Common, Omnisis, Opinium, People Polling, Redfield & Wilton, Techne and Yougov.
[3] For example, some polling firms choose to include likelihood to vote in their vote intention definitions - others do not.

With this data in hand, it is possible to examine general trends and movements in the data by fitting so-called Local Regression (Loess) curves to the data. These curves are a slightly more sophisticated version of the basic moving average – these curves weight the data such that data far from the date in question is weighted less than data closer to the date.

In the party-to-party figures (**Figures 1 - 4**) we set the span of the Loess curve to be 0.2 thus using 20% of all the data around each date to calculate the value of the curve. This span reduces the noise that is naturally associated with aggregating multiple polls but still gives some clue into the finer details of movement that occur on the scale of a month. Ultimately, the choice of span is dictated by the modeller and 0.2 is chosen as it strikes the right balance between reducing the uncertainty on quoted figures whilst uncovering the underlying trends and cycles.

In the regional plots (**Figure 5**), a span of 0.4 is used, reflecting the more varied nature of the regional party vote shares. This variation is a result of some regions having small sample sizes and hence these can change from week-to-week in extreme ways. Such changes have been removed by dropping any outliers in each region's data. These figures are indexed plots where the zero value is set to the start of 2023 (30/12/22) and as such the plots give the increase/decrease in vote share by region compared to the start of 2023.

Note that all vote shares quoted in this report are derived from the Loess curve - not the raw polls - hence they represent a moving poll of polls. Note that whilst raw data points are shown in the party-to-party plots, they are not shown in the regional plots for readability.

3. Changes in vote over the last year

In trying to uncover how the Conservative coalition, as subsequent vote shares, have collapsed since 2019 it is important to understand where these voters have defected to politically and as such it is worthwhile to spend some time examining the conditional probabilities. These conditional probabilities are the percentage of voters who were Conservative in 2019 but have now switched to another party. As such, these numbers are the probability someone will vote in a certain fashion *given* that they voted Conservative in 2019.

These proportions are shown for a variety of situations in **Figures 1** through **4**. Before discussing these proportions, and how they have changed over the past 18 months, a brief explainer of the plots is in order. A change of Conservative leader / Prime Minister is shown in blue and the 2022 mini-budget is shown in red across all plots. The percentages by each line are the proportion of voters who intend to vote for the party given in the plot at each political event. Note that they are rounded to the nearest percent and are derived from the local regression curve, not from any one particular poll on a given date. Finally, the residual standard error on the local regression curves is around 5% - this is the margin of error.
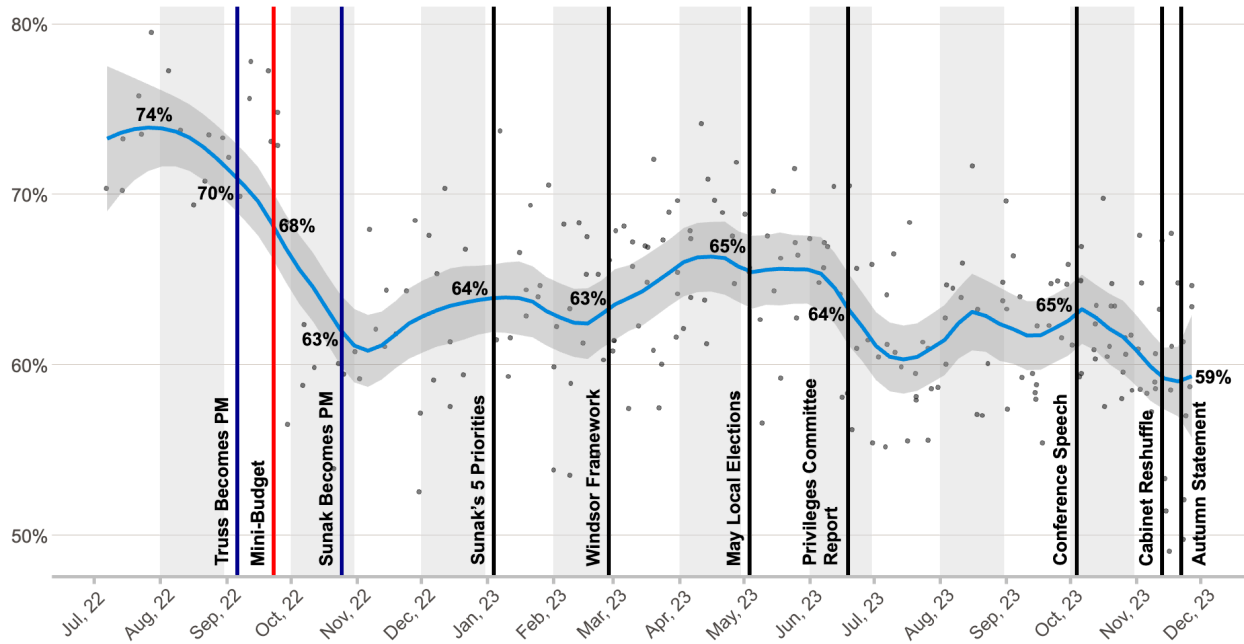
Conservative Attrition

Figure 1: The percentage of 2019 Conservative voters who say they intend to vote Conservative again now. Clearly, the majority of the damage done to the Conservative to Conservative vote share happened under Truss, but a further decline has happened recently under Sunak.

Looking at Conservative voters shown in **Figure 1** - namely those who intend to vote Conservative again in 2024/25 having voted Conservative in 2019 - there is a clear drop in this proportion during August, September and October 2022. The number of Conservatives who intend to vote Conservative again falls[4] from around 7.2 million in August 2022 to 6.2 million by the end of the Truss premiership - a loss of 1 million voters in around three months. From November 2022 onwards the proportion of Conservative-to-Conservative voters has remained around the 63-65% mark representing around 6.2 – 6.4 million voters. That is until the conference season in early October 2023 – since that point a further 6 points has been lost to other parties, corresponding to a loss of 600,000 voters and places the Conservative-to-Conservative proportion at its lowest point over the past 18 months – lower even than the Truss nadir seen in early November 2022. In net terms, accounting for votes won back from other parties, this amounts to 520,000 votes lost since the party conference season in October 2023.

There may have been a small turn upwards from this low of 59% after the cabinet reshuffle and the autumn statement, but this is too minor to ascertain at this stage.

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[4] This is based on the assumption that 30% of Conservative voters either don't know who they will vote for, refuse to say or will not vote. Hence using 2019 popular voting figures there are around 10 million voters who voted Conservative previously who have said how they will vote in the next election.
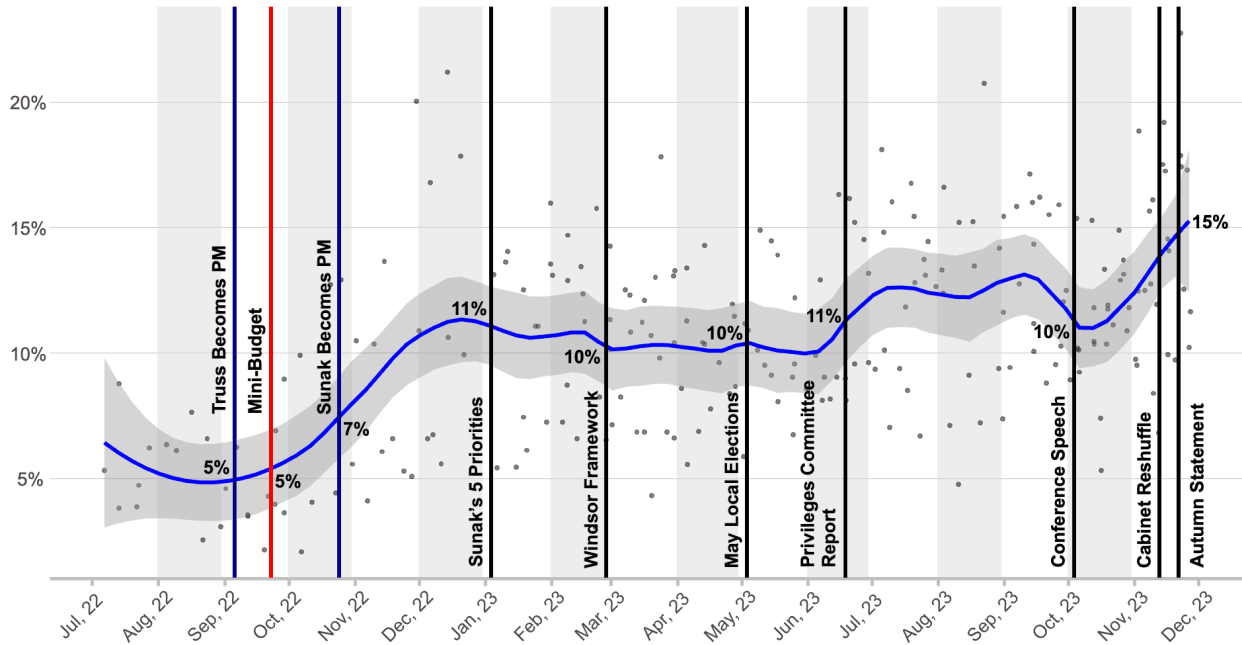
Reform on the Rise

Figure 2: The percentage of 2019 Conservative voters who say they intend to vote Reform UK in 2024/25. There appears to be a latent, continuous increase from the time Truss became Prime Minister until Mid December 2022 where the share stabilised at around 10-11%. Since October 2023 this has sharply increased to 15%.

The question now is to ascertain where these voters have defected to. **Figure 2** shows the proportion of previous Conservative voters who are now saying they intend to vote for Reform UK. This figure stood at only 5% at the start of the Truss premiership, representing around 490,000 previous Conservative voters. Over the Truss premiership this margin only increased by 2 points - however, the figure continued to increase until early 2023 when it stood at around 11% - suggesting that about 1.1 million previous Conservative voters were then considering voting for Reform UK - this is a significant surge from the August 2022 figure with approximately a further 600,000 of the Conservative coalition intending to vote for Reform UK.

The 10% figure remains largely unchanged throughout the first half of 2023. However, during June and July this figure jumps by around 3 points - likely owing to the record number of small boats crossing the Channel.

From July 2023 the proportion of such voters held steady at around 13% until Mid-September 2023 when it fell by around 2 points to 11% again. However, from early October this group began to grow again, to record highs, starting around the same time as Sunak's speech at Conservative party conference. Since then, it has continued to rise until it reached 15% at the end of November - representing around 1.5 million previous Conservative voters. Those who

voted Conservative in 2019 and now intend to vote Labour are rather different to those going to Reform UK.
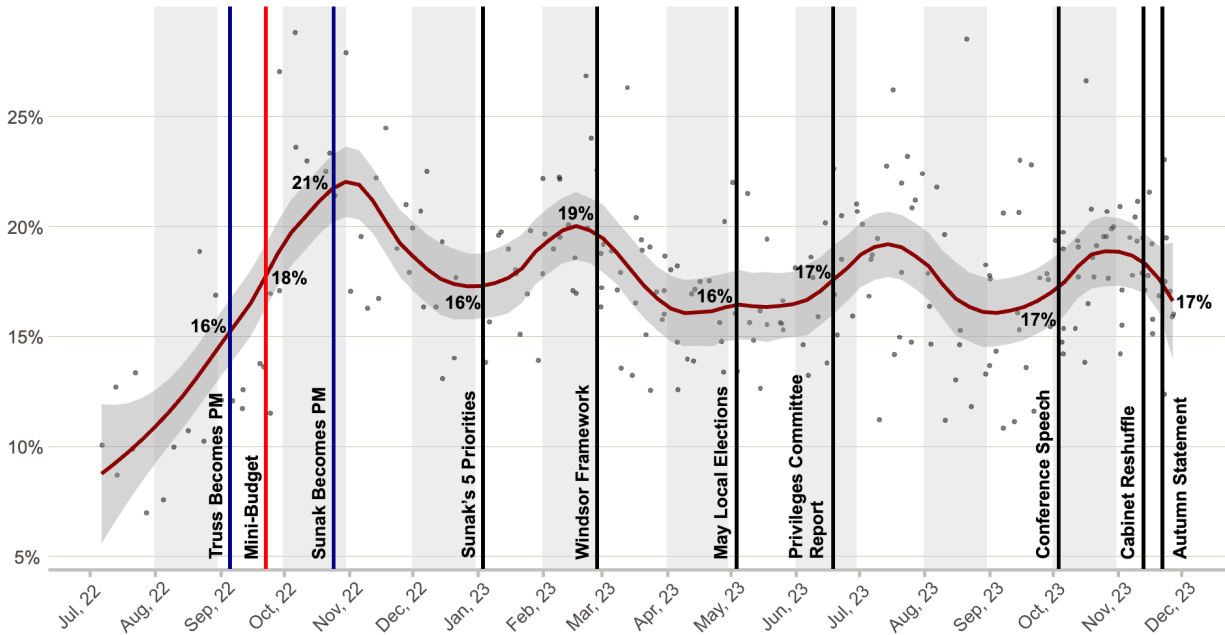
Defections to Labour

Figure 3: The percentage of 2019 Conservative voters who say they intend to vote Labour in 2024/25. This share increased by 5 points during the Truss premiership before stabilising around 16-17% during the latter half of 2023.

The group of those switching directly from the Conservatives to Labour represented around 16% of the previous Conservative vote at the start of the Truss premiership - this equates to around 1.6 million previous voters. This share rocketed during the seven weeks of Truss from 16% to 21% by the time Sunak took office - an increase of 500,000 voters. However, once Sunak took office this proportion began to drop once again, resting at 16% by the time Sunak outlined his five priorities for the year. After this, the proportion began to climb again, potentially driven by macroeconomic factors and the rising cost of living during this period.

By the time the Windsor Framework was announced in late February 2023 this group represented 19% of previous Conservative voters. Following this, and throughout the summer of 2023, this share remained at around 16-17% - albeit there appears to have been an increase in the wake of the privileges committee report on Boris Johnson. A further surge and ebb occurred during September and October this year, peaking after Sunak's conference speech. The number at the end of November 2023 sits at 17% or 1.7 million, which is a huge boon for the Labour party, especially when faced with a Conservative party who are haemorrhaging voters.

It is worth noting some approximate demographic differences between these two groups in order to understand what is motivating these individuals to abandon the Conservatives for either Reform UK or Labour. Of the Conservative-to-Reform UK voters, around 41% are over the age of 64 and represent by far the largest age group of this tribe. This contrasts with Conservative-to-Conservative voters, where only 27% are over the age of 64 and Conservative-to-Labour voters, of which around 18% are over 64. Furthermore, around 44% of the Reform UK switchers live in the South East, East of England and London, whereas only 34% of the Labour switchers live in the part of Britain. Other demographic differences occur when looking at the highest qualification level with 49% of Labour switchers holding some form of higher education qualification, compared to 38% of Reform UK switchers. Additionally, only 5% of Labour switchers hold apprenticeship qualifications, which is 9 points less than Reform UK switchers. Finally, of the Labour switchers, 35% are in the upper-middle class (AB) and only 23% are from working-class backgrounds (DE). This contrasts starkly with the Reform switchers, 30% of whom are from working-class backgrounds (DE) with just 18% from the upper-middle classes. This paints a picture of two groups who are demographically very different and who have quite different priorities. If anything, this confirms the almost Everest-size challenge the Conservative party face if they wish to hold onto even a small part of the electoral coalition built in 2019.

Shy Tories?
That being said, the analysis so far ignores the shy Conservative voters who are often missed by surveys. J. L. Partners have undertaken research in order to uncover some indication of the size of this group of voters. To do this a series of machine learning classification algorithms were used to utilise demographics and attitudinal indicators to assign those who reply "do not know" to vote intention questions to a party. In one such model, around 48% of those who replied "do not know" to vote intention questions were found to have a strong propensity to vote Conservative, with only around 18% being likely to vote Labour. Given that around 16% of panellists currently say they do not know how they will vote, assigning 50% of these to the Conservative party will likely have a dramatic impact on election predictions. It is important to stress, however, that "don't knowers" are notoriously difficult to predict and whilst current machine learning techniques report very high accuracy metrics, such figures could change dramatically over the next 10-12 months.
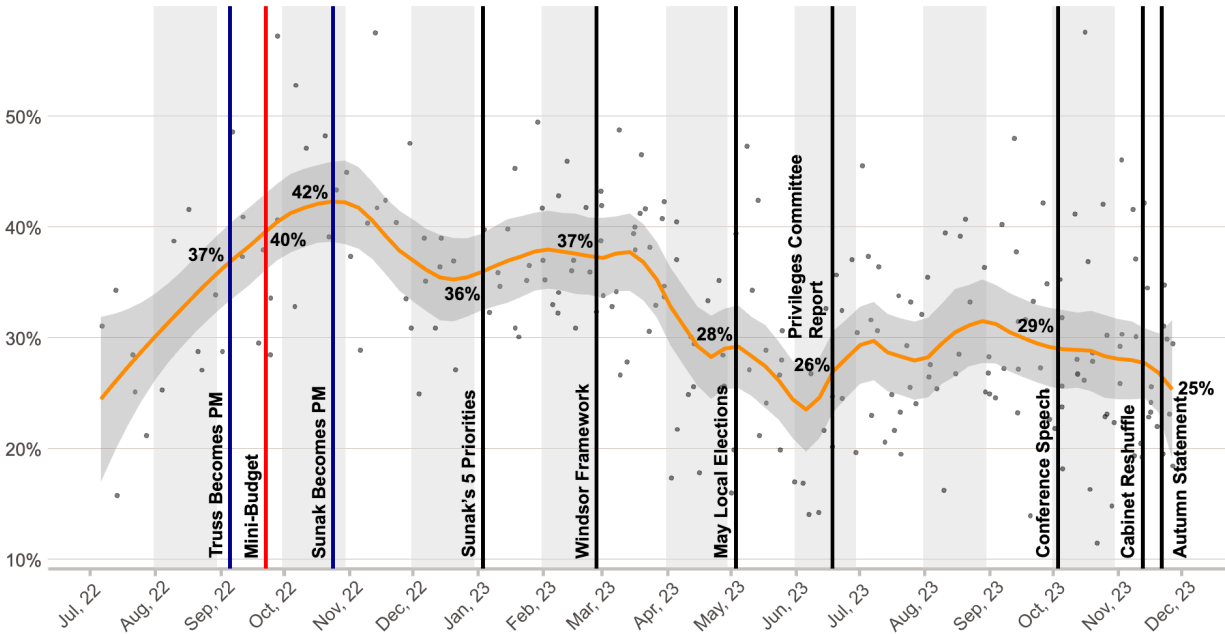
Tactical Voting

Figure 4: The percentage of 2019 Liberal Democrat voters who say they intend to vote Labour in 2024/25. This percentage peaked at the start of Sunak's premiership and has been declining since - although in the latter half of the year it has tended to stick around 1 in 4 previous Lib Dems intending to vote Labour indicating a strong tendency for tactical voting.

Finally, there is significant potential for tactical voting in the next general election. **Figure 4** shows the proportion of previous Liberal Democrat voters who now intend to vote Labour in the next election - likely due to tactical voting across the country or those who were centre-left and did not want to vote for Corbyn's Labour party. This group of voters peaked at the end of Truss' premiership, where 42% of previous Liberal Democrats - equalling around 1.4 million voters - said they would vote for Labour in any upcoming election. Adding this to the Labour switcher figure equates to an extra 1.9 million potential votes for the Labour party at that point. However, since that high, this number has slowly decreased with major drops occurring in the run-up to the May 2023 elections and after. Currently, 1 in 4 previous Liberal Democrats now say they will vote Labour, which is still a boost of over 800,000 voters. Such voters could be thinking tactically, and this could harm the Conservatives in seats where Labour are close.

This group is demographically similar to the Labour switchers also with just 16% being over the age of 64 - the vast majority are aged between 35-64 standing at 71%. That being said, 47% of this group live in the South East, London or the East of England, which is 13 points higher than the Labour switchers. This group is also highly educated with 58% holding higher education qualifications and just 3% holding an apprenticeship qualification.

The final tallies

Since 2019:

	% of Previous Conservative Votes Lost / Gained	Votes Lost / Gained
Conservative-Conservative	- 60%	- 8.2 million
Conservative-Labour	+ 12%	+ 1.7 million
Conservative-Reform UK	+ 11%	+ 1.5 million
Conservative-Liberal Democrat	+ 4%	+ 500,000
Conservative-Don't know / Will not Vote	+ 31%	+ 4.2 million

Table 1: Conservative votes lost / gained by various parties since the 2019 General Election. The Conservatives have lost well over half of their support since 2019, giving votes to parties from across the political spectrum.

Since November 2022:

	% of Previous Conservative Votes Lost / Gained	Votes Lost / Gained
Conservative-Conservative	- 6%	- 380,000
Conservative-Labour	- 19%	- 380,000
Conservative-Reform UK	+ 53%	+ 760,000
Conservative-Liberal Democrat	+ < 1%	+ < 10,000
Conservative-Don't know / Will not Vote	+ 0%	0

Table 2: Conservative votes lost / gained by various parties since November 2022. Note that, don't know/will not vote has remained largely unchanged.

4. Regional Changes

Using our approach we can also look at how vote shares have changed over the past year in order to get an idea of which regions have the highest levels of change. **Figure 5** shows the local regression curves for the Conservatives, Labour, Liberal Democrats and Reform UK. Note that raw polling numbers are not shown as they were in previous plots owing to the fact that

regional breakdowns incur the penalty of smaller sample sizes and hence larger variations, plus plotting many parties on one plot tends to render it unreadable.

Since 2019, vote shares in every region have decreased for the Conservative Party[5] with the most dramatic drop occurring in the Midlands where the vote has collapsed from 55% in 2019 to 28% as of the end of November 2023. However, much of this loss had already occurred by the start of 2023 when vote share for the Conservatives stood at just 34%, a drop of 21 points from the 2019 election. It is interesting to note that since the start of 2023 the Conservative vote share in Scotland, Wales and London has not changed significantly, whereas in the other regions it has continued to drop by between 4-6 points. However, **Figure 5** makes it clear that these drops are relatively small when compared to the overall vote share the Conservatives have in each of the regions. Since the beginning of the year Labour's regional average vote share has largely stagnated – decreasing in some areas, for example, in Wales Labour's average vote share has declined from 46% to 41% and in the North, it has declined from 54% to 50%. Once again, relative to the overall vote share, these changes are quite small when compared to other parties - see **Figure 5**.

These trends are bucked in Scotland where vote share rises from 21% to 35%, representing a net increase of around two thirds over the course of 2023. Given the pivotal nature of Scotland to any Labour government it ought to be reassuring to Labour that their vote share has consistently been improving in this very consequential country. The Liberal Democrats currently perform worse than in the 2019 Election and have improved only slightly since the beginning of 2023. The sharpest decrease has occurred in Scotland, where the Liberal Democrat vote share fell from 10% in 2019 to 5% in November, and the South of England where they have lost 3 points on their 2019 election share. As can be seen in **Figure 5** the Liberal Democrats enjoyed a surge in support in Wales until October of this year when the improvements began to fall back again - although given that they only held 4% of the vote share at the start of 2023 such increases are unlikely to change the political landscape in that region.

The largest regional increases in Reform UK vote share from 2019 were in the South of England, where vote share increased from 0% to 9%, and the Midlands, where it increased from 1% to 9%. Since the start of 2023, the largest increases have occurred in the North (6% to 10%) and the South of England (5% to 9%). The vote share only decreased in Scotland, from 3% at the beginning of 2023 to 2% in November, with growth everywhere else. In the North and Wales Reform UK has overtaken the Liberal Democrats as the fourth and third largest parties respectively. At the start of 2023, the Liberal Democrats held 8% of the vote in the North – this has not changed to November and remains at 8%. However, Reform UK has grown from 6% at the start of the year to 10% by the end of November, overtaking the Liberal Democrats as the third largest party in the North. In 2019, the Liberal Democrats were the 4th largest party in Wales with 6% of the vote compared to Reform UK's 5%.

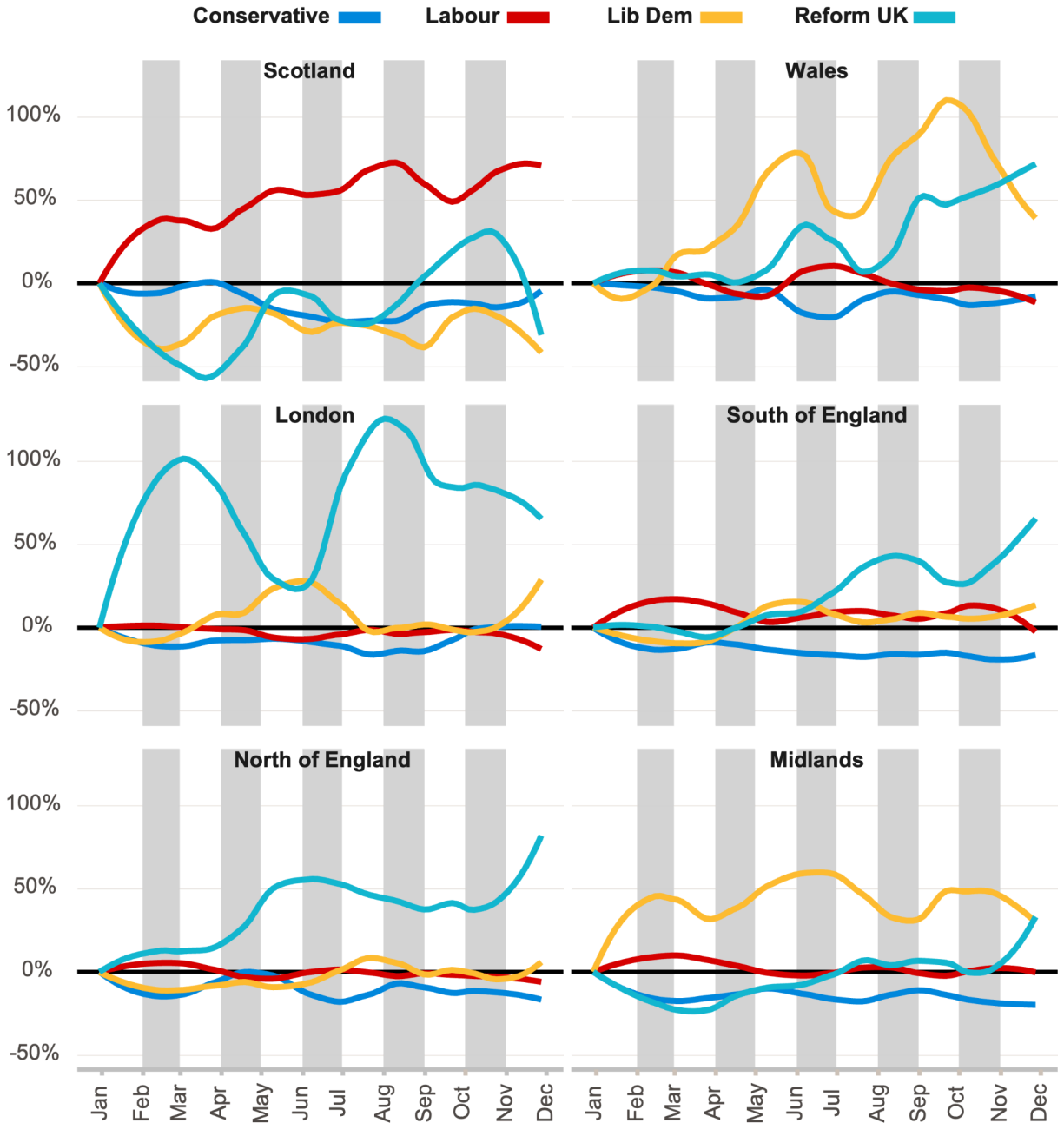[5] These numbers can be found in the Appendix at the end of this report.

Figure 5: This set of plots shows the increase in regional vote shares compared to the figures at the start of 2023. Hence 0% indicates no change from the beginning of the year, 100% indicates a doubling of the vote share and -100% indicates all vote shares lost. For example, on 30/12/22 the regression predicts that the Conservatives held around 19% of the vote share in Scotland. If the plot indicates that in March 2023 the relative vote share is -50% then this suggests that the Conservatives lost half of their support, putting them on around 10% of the Scottish vote share.

But by the start of 2023 Reform UK was ahead of the Liberal Democrats by 2 points and this had increased to 4 points by the end of November 2023 – cementing Reform as Wales' fourth largest party. In the Midlands, Reform UK was ahead of the Liberal Democrats at the start of 2023 and this lead remained throughout 2023. In January, Reform UK's vote share was 7% in the Midlands – 6 points above their 2019 results – increasing further to 9% by the end of November. However, the Liberal Democrats held 6% of the vote share in January, increasing to 9% by the end of November. It is clear from **Figure 5** that the increases in the South of England, Wales and the North of England are driving the increase in Reform vote share. With the major parties changing little over the past year, Reform UK's increase has been the "star" in the changing electoral landscape that faces us at the next general election.

5. Conclusions

This report has laid out an in-depth analysis of the changing electoral landscape from a conditional probability point of view. By asking the question, "Given that you voted this way previously, how would you vote now?" this report has been able to uncover some of the contours that are present underneath the topline voting intention we see in the polls.

We see:

- **The Conservatives falling behind even further with 2019 Tories:** to its lowest level yet, even lower than under Liz Truss
- **A stabilisation in Conservative-to-Labour switchers:** down from its high-point in November 2022 but still substantial
- **The rise of Reform:** taking significant numbers from the Conservative Party in a way not seen yet in this parliament
- **A yellow dividend for Labour:** Labour picking up a significant number of Liberal Democrat 2019 voters, pushing the Lib Dem performance down nationally
- **Improvements for Labour in Scotland:** Labour rising fast in Scotland, going from 21% to 36% in just a year

The next twelve months will reveal how these trends will develop as the next UK General Election nears closer.

Appendix: Regional Vote Shares since 2019

Party	2019 GE	January 2023	27 November 2023
Scotland			
Conservative	25%	19%	18%
Labour	19%	21%	35%
Liberal Democrat	10%	9%	5%
Reform UK	0%	3%	2%
Wales			
Conservative	36%	21%	20%
Labour	41%	46%	41%
Liberal Democrat	6%	4%	6%
Reform UK	5%	6%	10%
London			
Conservative	32%	26%	26%
Labour	48%	53%	46%
Liberal Democrat	15%	10%	13%
Reform UK	1%	3%	5%
South of England			
Conservative	54%	37%	31%
Labour	23%	36%	35%
Liberal Democrat	18%	14%	15%
Reform UK	0%	5%	9%
North of England			
Conservative	40%	26%	22%
Labour	43%	54%	50%
Liberal Democrat	8%	8%	8%
Reform UK	5%	6%	10%

Midlands			
Conservative	55%	34%	28%
Labour	30%	46%	46%
Liberal Democrat	10%	6%	8%
Reform UK	1%	7%	9%