



# Realignment on the right

How our Political Tribes  
predicted the new  
party landscape



What people  
think, feel and do.



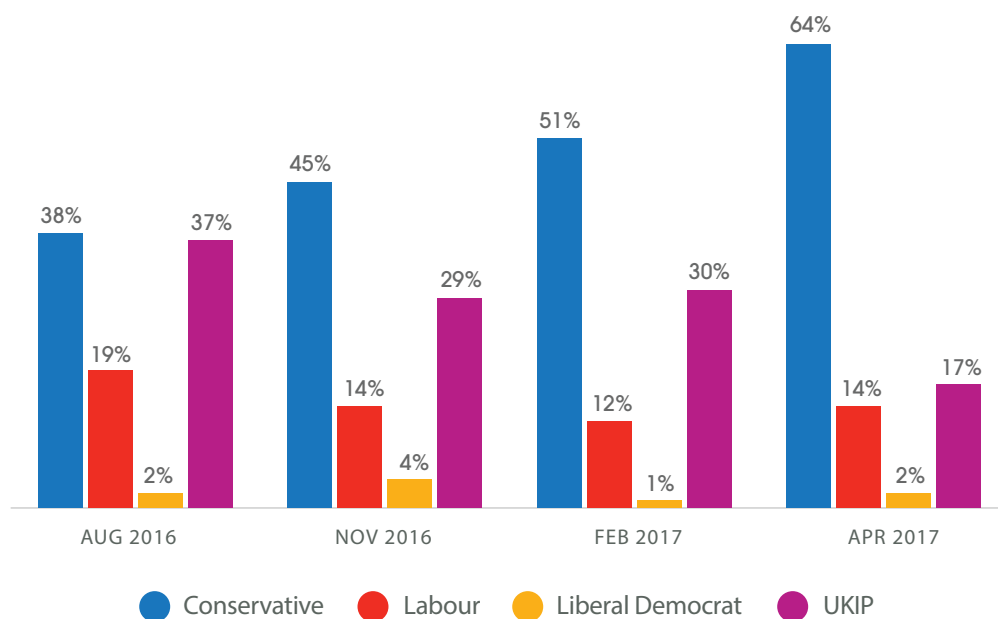
## Uniting the right

The 2017 local elections confirmed what Opinium's "Political Tribes" research has been showing since we first presented our work in August 2016: that Britain is undergoing a major political realignment, uniting the right and potentially shattering the left.

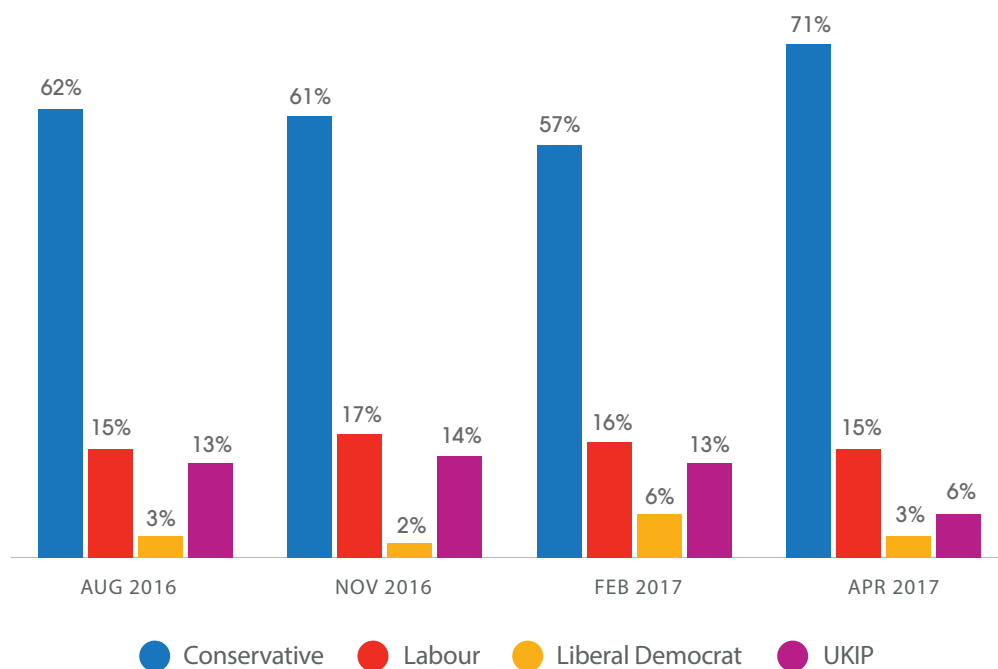
Our original analysis, developed with the Social Market Foundation, [and available here](#), showed that when the British public are segmented by political attitudes to various issues and ideas, eight natural clusters form. The two largest we labelled "Common Sense" and "Our Britain" which, respectively, represent traditional conservatism and the more nativist viewpoint typically espoused by UKIP. Between them these two groups make up almost half of the adult population with each representing around 25%. In contrast the other six groups are much smaller with none of them topping 15%.

In August, Common Sense were already very pro-Conservative. On the other hand, Our Britain were evenly split between the Conservatives and UKIP with 38% and 37% voting for each party respectively. Now, Theresa May's party takes 64% of the "Our Britain" vote while UKIP have collapsed from 37% to 17%.

## Voting intention of “Our Britain”

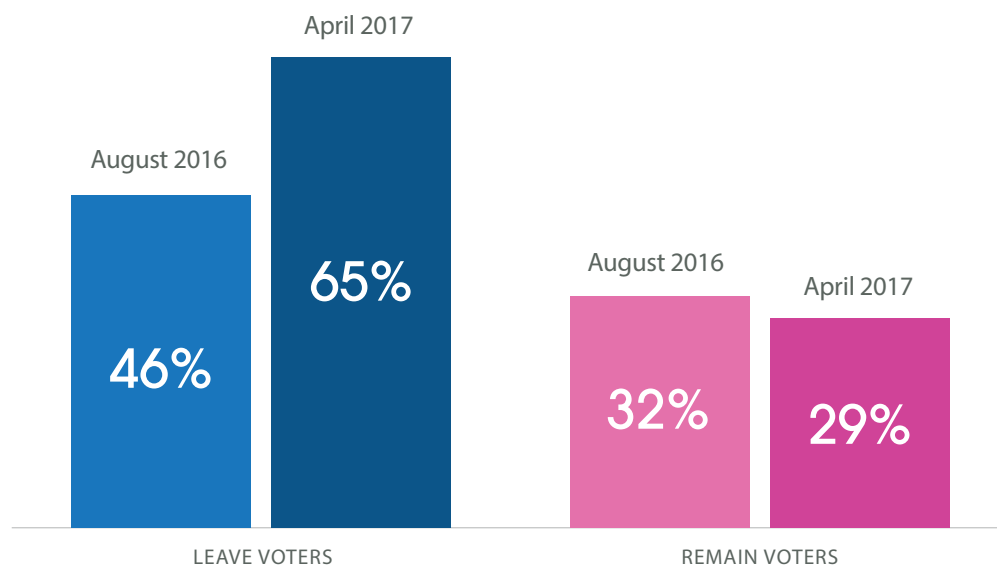


## Voting intention of “Common Sense”



Downing Street’s unstated but implicit strategy to “unite the 52%” is working and the Conservatives are carrying the Leave voters from all parties with them, most notably UKIP. In August 2016, the Conservatives were on 32% among Remain voters and 46% among Leave voters. In April 2017, their percentage of Remain voters has dropped slightly to 29% but their share of Leave voters has rocketed to 65%.

## Conservative vote share between August 2016 and April 2017

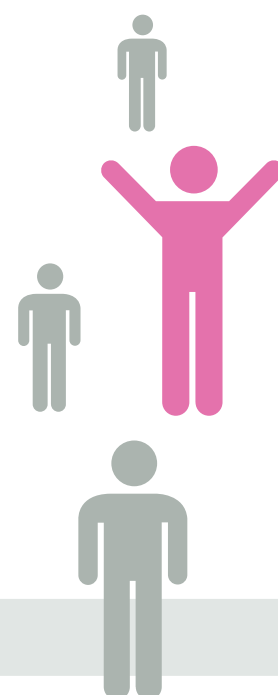


If the 52% are uniting around the Conservatives, what of the 48%? Outside of Scotland's unique political situation, what should Remain voters do?

The Liberal Democrats have sensed that Brexit could do for them what the Iraq War did after 2003 but since August they have grown from 8% of Remain voters to 15%, hardly a route back into government. As well as this, the distribution of Remain voters in mostly metropolitan constituencies means that they will face an enormous challenge converting their increased vote share into parliamentary seats.

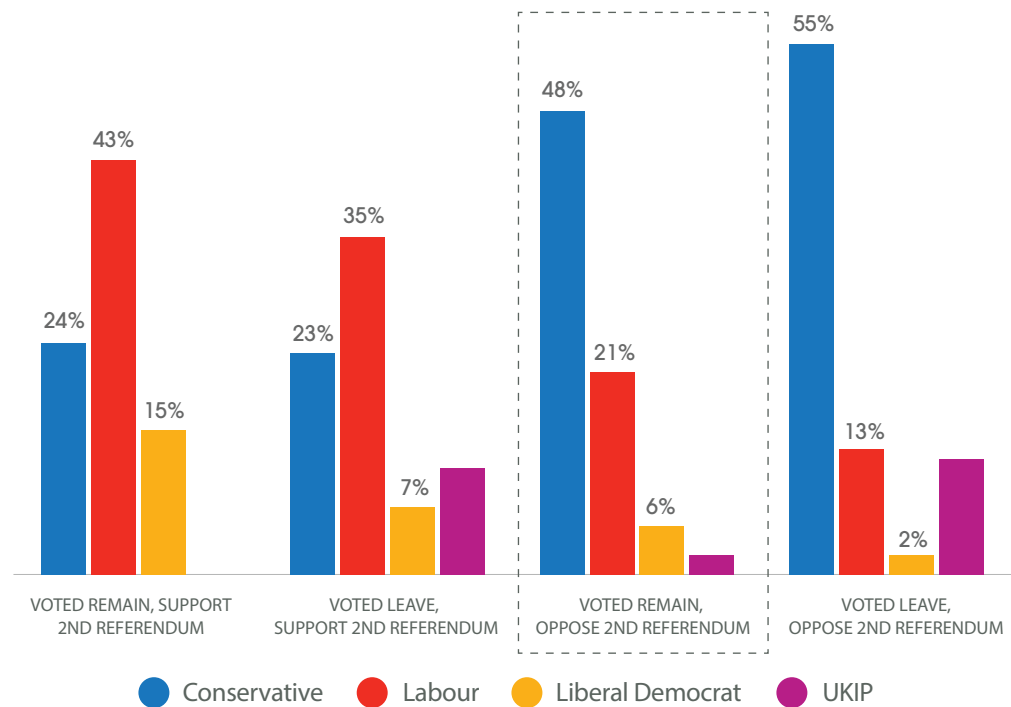
Labour's Brexit policy of, to put it charitably, constructive ambiguity may have won it few fans but its relative position among Remain and Leave voters has not changed since August. Talk of Remain voters moving en masse to the Liberal Democrats has, as yet, failed to materialise in large numbers. Labour remains the largest party among Remain voters almost by default, in the absence of other realistic options.

That leaves the Conservatives. A sizeable minority (39%) of 2015 Conservative voters supported Remain in the EU referendum but the party is now pursuing what was traditionally called "hard Brexit". That is a bigger proportion than 2015 Labour voters who voted Leave but Conservative MPs have fallen in line behind the government in the grand tradition of Tory adaptability and purpose. Prominent Remain supporters such as Nicky Morgan, Dominic Grieve and Anna Soubry have toned down their criticism and all three resigned from the Open Britain pressure group (and successor to the Remain campaign) when it advocated supporting Lib Dem challengers against various pro-Brexit Conservative MPs.



In a regular exercise Opinium runs with the Polling Matters podcast, we track attitudes to holding a second referendum on the terms of the eventual Brexit deal, with the options then being to accept the deal or cancel Brexit and remain in the EU after all. The consistent trend has been that the 52% who voted Leave are relatively united against holding another referendum while those who voted Remain are more divided. While most Remain voters favour a second referendum, a significant bloc oppose it and this bloc is dominated by Conservative voters.

## Voting intention by support / opposition to a 2nd referendum



When a party is as dominant as the Conservatives are now, the most effective opposition tends to come from within the governing party. Perhaps, for those who desire a softer Brexit, a senior Conservative politician needs to break ranks? Possibly using a major metropolitan newspaper as their platform?

Comparisons between British and American politics always tend to overstate the degree of similarity between the two countries but it is possible we may look back on the 2017 general election the way that Americans look back on Richard Nixon's 1972 landslide. One in which the social democratic coalition of social liberals and socially conservative but economically left wing voters was undone by the defection of social conservatives from the left to the right and where the left didn't really recover for a generation.

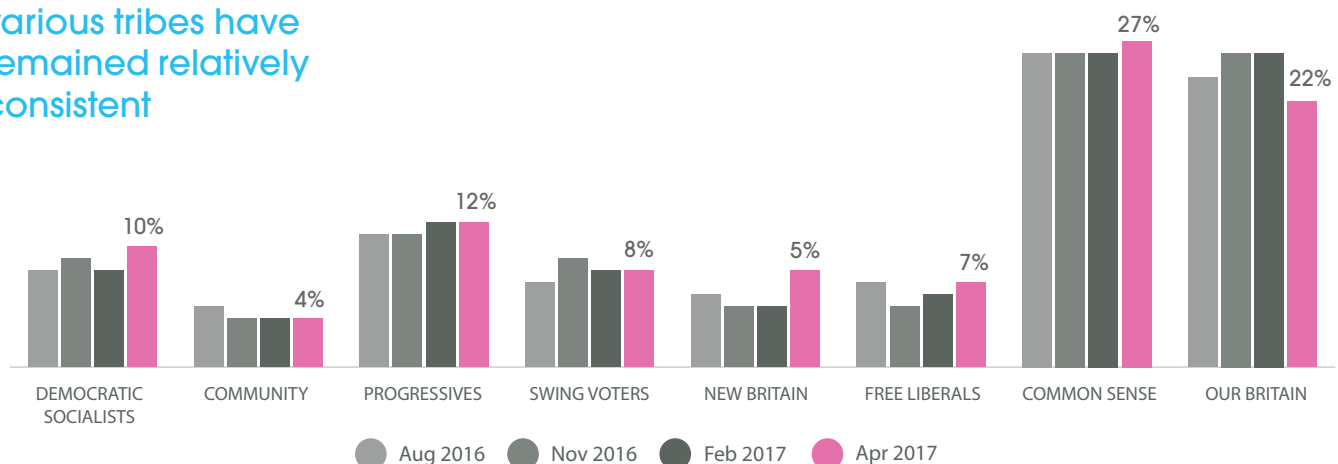




## Theresa May's personal appeal to "Our Britain"

Since August there has been little change in the size of each of the various tribes. The most pertinent figure, that "Common Sense" and "Our Britain" combined make up around half of the population, has remained steady although "Common Sense" has expanded slightly at the expense of "Our Britain".

The sizes of the various tribes have remained relatively consistent

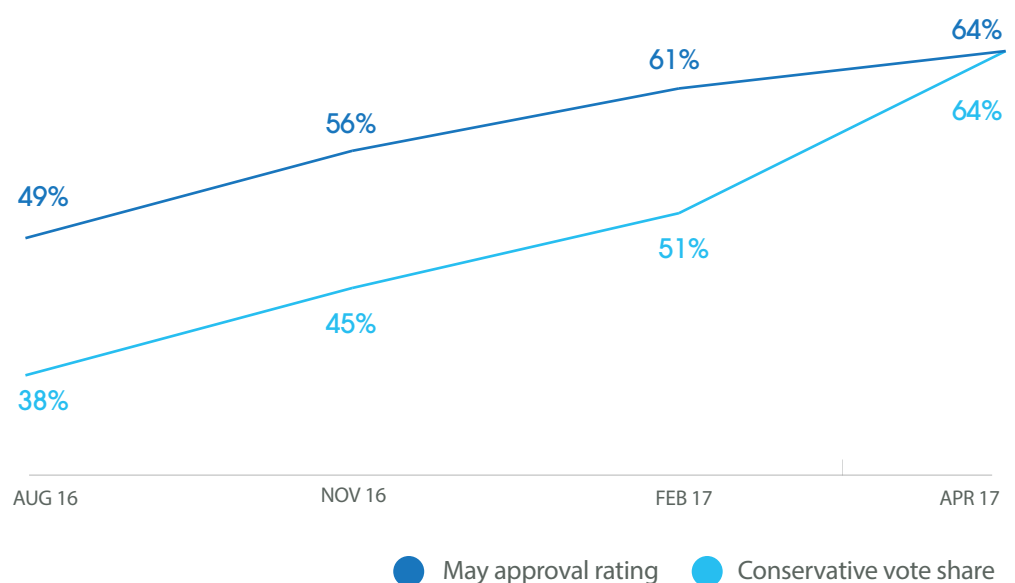


Ultimately, there has been no change in the overall size of each tribe that cannot be attributed to sample variation and margins of error. What is more interesting are the changes within each tribe.

Much has been made of how the Conservative campaign has been heavily personalised with the words “Theresa May” featuring more often than “Conservative” and one recent campaign event referring only to “Theresa May’s Team”. The prime minister outpolls her party, in contrast to Labour’s situation, but this is particularly the case among “Our Britain”.

Focusing on a “hard Brexit” has seen May’s ratings among this group soar since last summer and the Conservative share of their vote has risen accordingly:

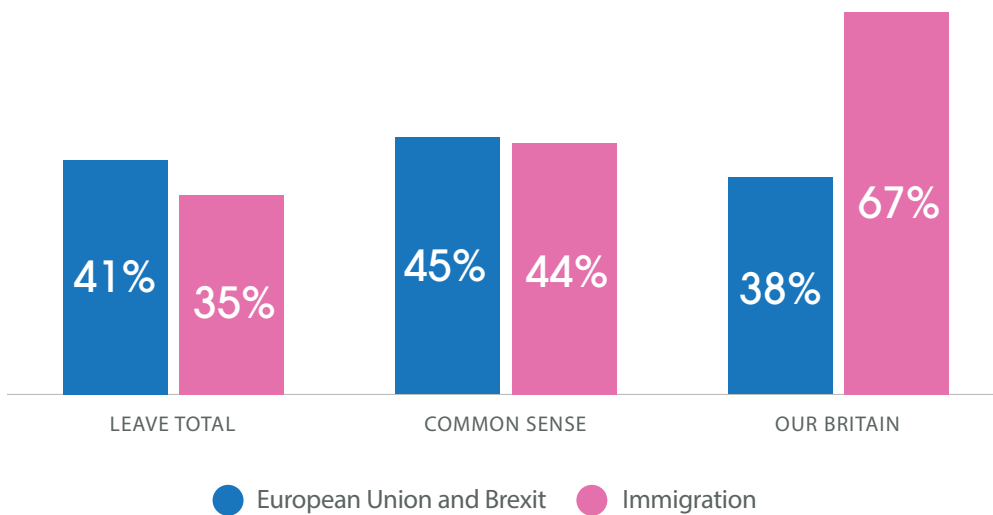
### Theresa May has turned “Our Britain” heavily to the Conservatives



But May’s support for “hard Brexit” is driven by a desire to limit immigration and a glance at the issues deemed most important to each tribe helps show why.

While “European Union and Brexit” is an important issue for all tribes, it is slightly lower than average for “Our Britain”. This would seem surprising in a group where 80% voted Leave but the results for immigration make sense of it. “Our Britain” are the most concerned, more than any other group, by immigration and it is Theresa May’s hardline approach to this issue which has won these voters over in such significant numbers.

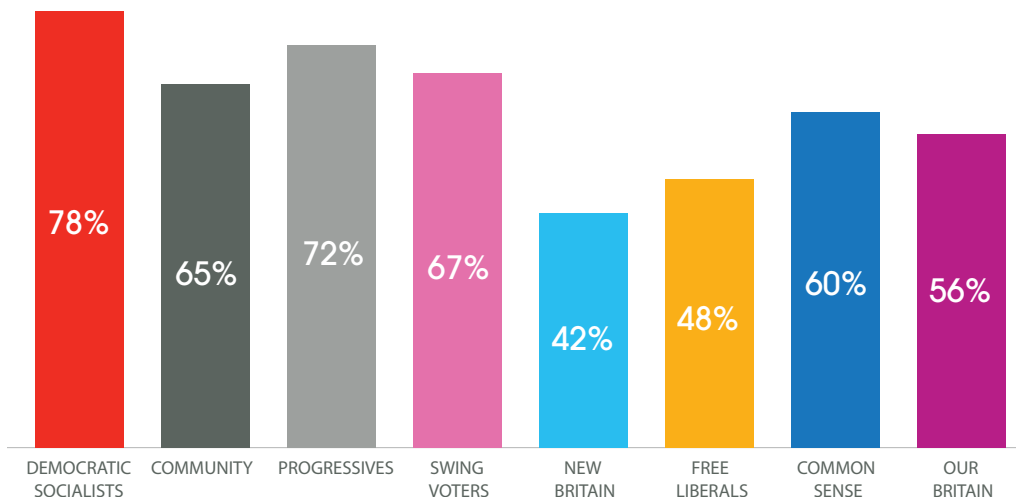
Immigration is the main driver of "Our Britain"



Immigration is also the issue that separates the "Community" group from the other generally left wing tribes. Only 3% of "Democratic Socialists" and 9% of the more centrist "Progressives" cite it as an issue vs. 39% of "Community".

Where "Community" has more in common with other left wing tribes are their shared concern over issues like housing which is cited by 23% of both "Democratic Socialists" and "Community" and more than any other tribe.

% of each tribe citing the NHS as an important issue



Interestingly, while the NHS is the most commonly cited important issue (60% of all adults), concern is lowest among the tribes with the highest average income: "New Britain" and the "Free Liberals".

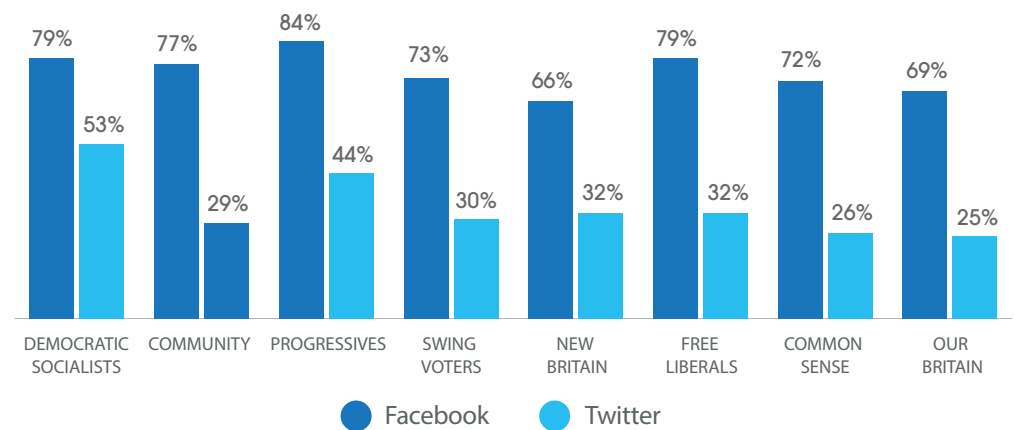


# Twitter is not Britain

David Cameron's maxim in 2015 explaining why so many failed to predict his victory in that year's election was that "Twitter and Britain are not the same thing" and in this wave of the research we looked at how each tribe is represented on social media.

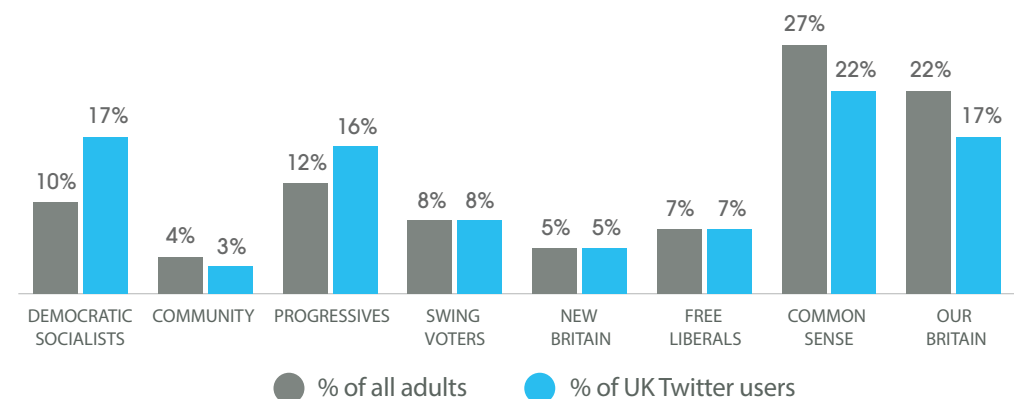
While 73% of UK adults have a Facebook account only 32% are on Twitter, which tends to dominate public debate about politics.

## Usage of social media among each tribe



There are clearly some demographic effects at play here as "Democratic Socialists" tend to be younger than groups like "Our Britain". But, if we flip this chart around, we can see that "Democratic Socialists" and "Our Britain" make up the same proportion of the UK's Twitter accounts despite the latter group being more than twice as many actual people as the former:

## Which groups are over and under represented on Twitter



Twitter users in each tribe have similar levels of usage with 50-60% saying they use it "10 times a day or more", so the gap in usage is at the level of having an account at all rather than between silent and vocal users.

# The Brexit election

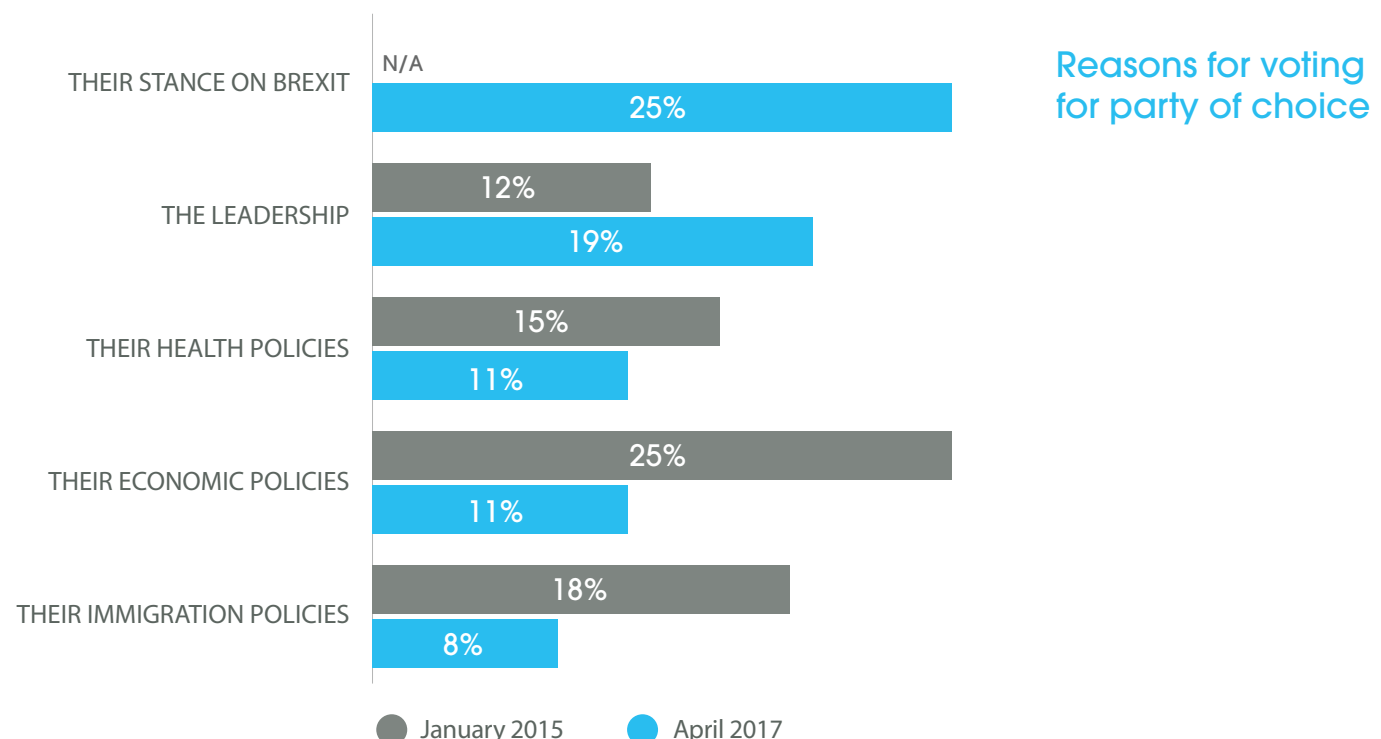
For the final section of this report, we reproduce an article that appeared on our website at the beginning of the campaign.

If the Conservatives do win this election comfortably, it will be because of Theresa May and Brexit.

This general election will be fought on terms that are very different from what we're used to. Two years ago we listened to a relentless barrage of slogans from Conservative politicians emphasising their party's credibility on the economy. Now we see the Conservatives doing their best to emphasize their stance on Brexit.

In 2015 and at the beginning of the campaign, Opinium asked voters what was the single thing driving their vote choice and found that the Conservatives have been even more successful in dominating the early stages of the campaign than in the last general election.

Currently, a quarter (25%) are voting for a party based on their stance on Brexit, while 19% are voting for a party based on their leadership. In January 2015 the economy came top of the list, but now it sits in a relatively distant third place, just ahead of health policies.







The effect it has had on the Conservative vote is striking. In 2015, half (49%) of Tory voters said they sided with the party mainly because of their economic policies. That has now fallen to only 14%. Now the main drivers for voting Conservative are the party's leadership (31%) and stance on Brexit (31%) in equal measure.

Brexit is also driving the Lib Dem vote. Half (50%) of those currently intending to vote Liberal Democrat state the party's position on Brexit is the main reason why they intend to do so.

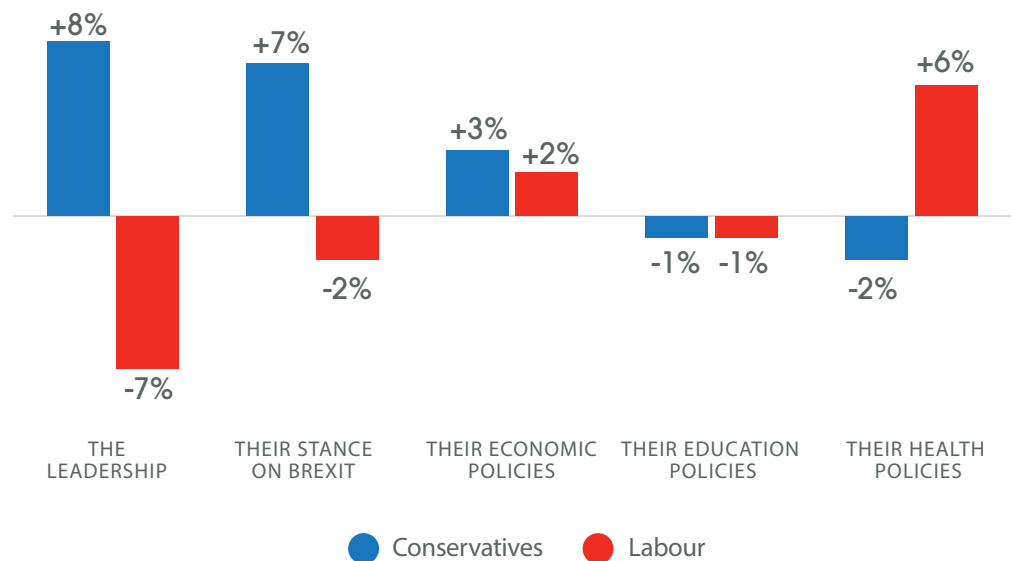


## The effect on the party's vote

We also asked voters what was putting them off voting for each party. What we get from this is the net effect the party's stance on a particular policy area was having for its vote share.

For example, 10% of all UK adults said they were voting for the Conservatives because of their position on Brexit, while 3% named it as the reason why they were not voting Conservative – so we can say that the party's stance on Brexit has contributed net 7% of all potential votes up for grabs.

Net effect on vote share of each issue  
(% of all UK adults)



For the Conservatives this shows how important it is for them to keep the election about Theresa May and Europe – they are both significant net gainers for the party. The economy is also an auxiliary net gainer for the party, but Labour does at least have an economic narrative with which to respond.

What the Conservatives must avoid is getting bogged down on domestic issues such as the NHS, which is the biggest drag on the Conservative vote share, and also the biggest contributor to Labour's.

Unsurprisingly, the results demonstrate how much of a bind Brexit is for Labour – an equal number of Leavers and Remainers say they are not going to vote for Labour due to the party's stance on Brexit. However, it's the leadership that is the main sore spot for Labour, and nothing can be done about that between now and the 8th of June.





## About the authors



### **Adam Drummond // Head of Political Polling**

Adam is the Head of Political Polling and has been with Opinium for six years. In that time Opinium have accurately predicted the result of two London Mayoral elections and the EU referendum. Adam works with clients in both the corporate space as well as universities, charities, campaign groups and news organisations.



### **James Endersby // Managing Director**

James is managing director of Opinium Research and whilst leading a fast growing research and insight agency, continues to work closely with clients from a variety of sectors in the UK and around the world. James has a management consulting background having worked for the Monitor Group Management Consultants (now Monitor Deloitte) and was based out of the London, Delhi and Boston offices.



### **James Crouch // Senior Research Executive**

James works across a variety of fields including our social research division and is a member of the Opinium political polling team. James' experience has primarily been amongst consumer and secondary research, delivering cutting edge insight into the key drivers behind our changing behaviour and attitudes for clients, ranging from academic institutions to media outlets and think tanks.



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## **About Opinium**

Opinium is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on the pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and resolve commercial issues, helping them to get to grips with the world in which their brands operate, by ensuring we develop the right approach and methodology to deliver robust insight, targeted recommendations, and address specific business challenges.

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