



What people think,
feel and do

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The Political Report

25th November 2019



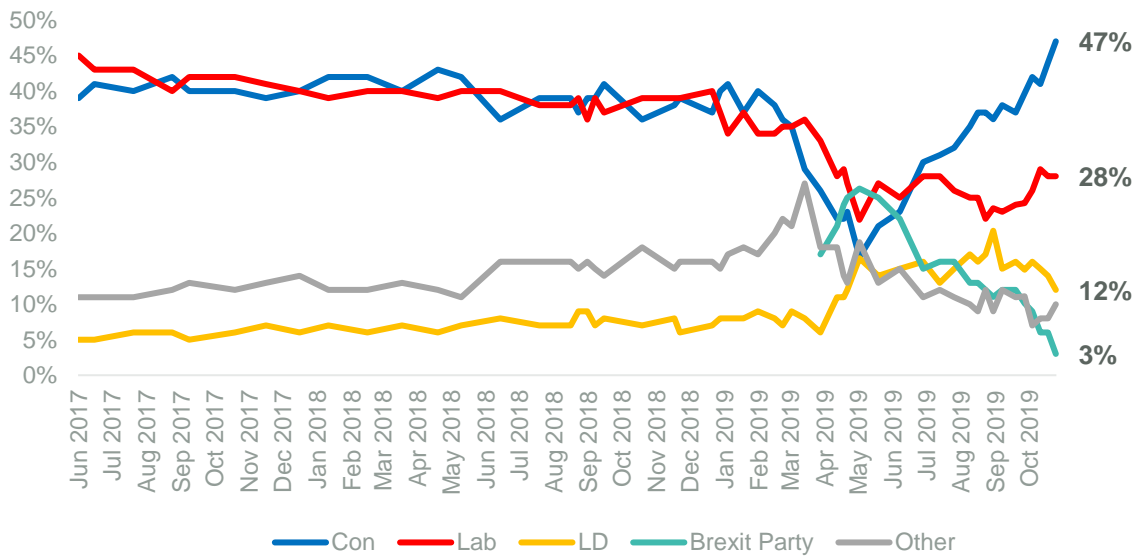
From the Opinium/Observer polling series

25th November 2019

One-minute takeaway

- The Conservative Party lead Labour by 19-points, with a vote share of 47%.
- Underlying their lead is the Tories continued monopolisation of the Leave vote, with now three quarters (75%) saying they would vote Conservative.
- Despite their first TV debate, the public haven't shifted their opinion on who they think would be the best PM, with 31% claiming neither Johnson or Corbyn appeal.
- Brexit is the most important issue when it comes to the public casting their vote, despite the NHS being seen as the most important issue facing the country as a whole.
- In the wake of the first leaders' debate, perceptions of both Johnson and Corbyn have got worse.

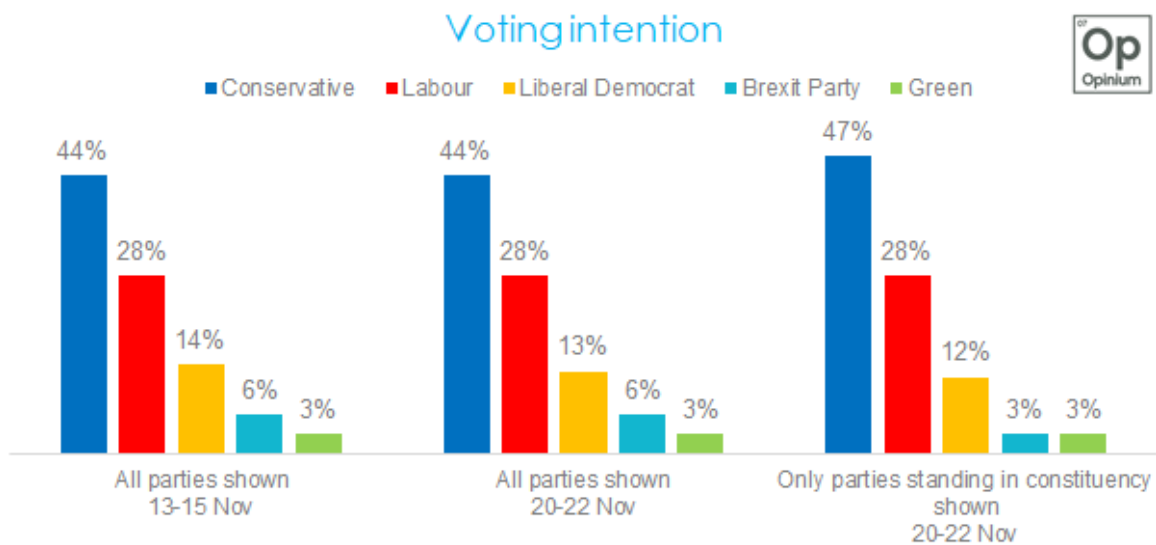
Voting intention since the 2017 general election



The state of the parties and leaders

The Conservatives lead by 19 points

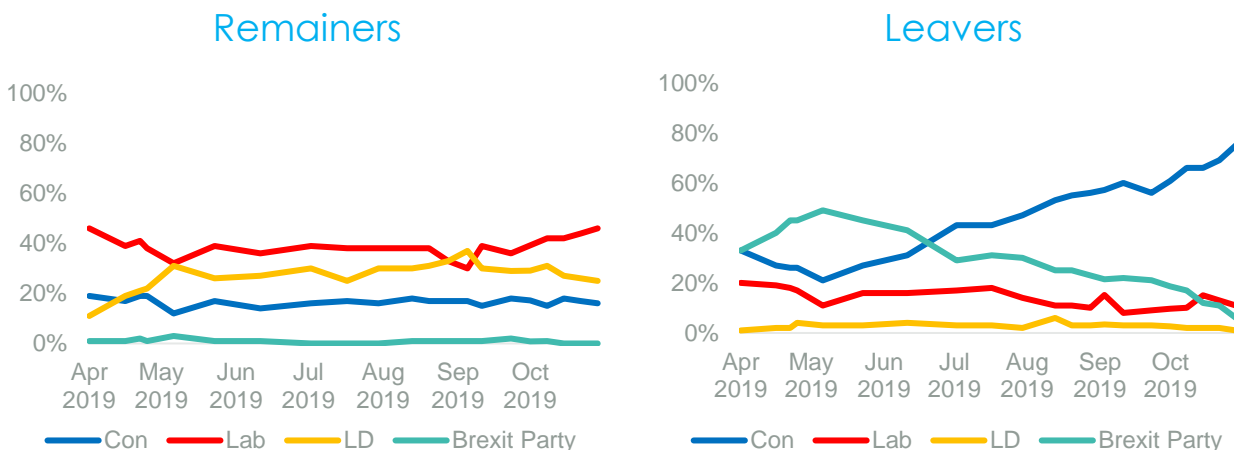
In a week that saw the first TV debate of the election, the Conservatives have 47% of the vote share. Labour have stagnated in comparison at 28% and now lag behind the Conservatives by some way.



The Liberal Democrats continue a downward trend, with the Brexit Party seeing their vote share half to 3% when taking into account constituency shortlists.

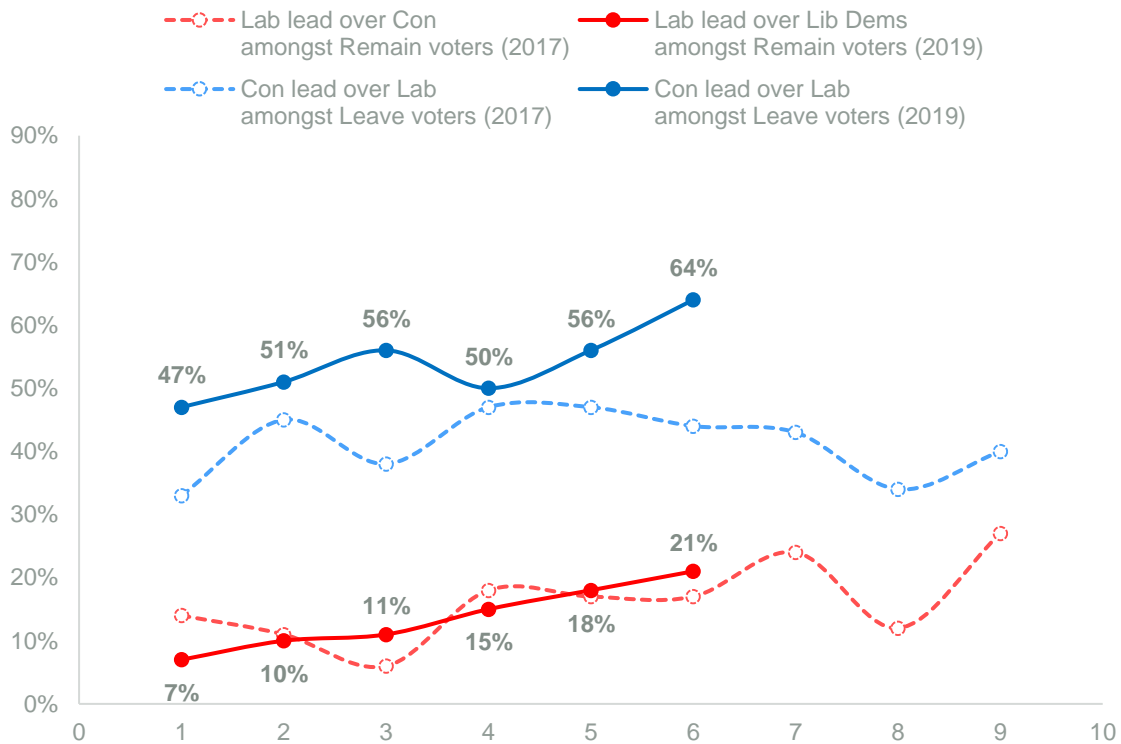
Tories continue their monopolisation of Leavers

Continuing their trend of absorbing the Leave vote, the Conservative's appear to have benefitted significantly from the announcement that the Brexit Party would not be standing in 317 Tory-won seats. Since this announcement at the beginning of last week, the Tories have gone from taking 69% of the Leave vote share to now a remarkable 75%.



Turning to the Remain vote, there are positive signs for Labour who have increased their vote share within this group 10 points since the election was called, going from 36% to 46%. However, despite the Liberal Democrats vote share declining since September, they still hold a quarter of Remainers' votes which is acting as a barrier to Labour's ability to consolidate this cohort behind them.

Party leads by EU Referendum Vote (2017 vs 2019 by week)



Key: week 9 is the week of the general election.

Comparing to the general election in 2017, the remarkable ability of the 2019 Conservative party to unite the Leave vote behind them as opposed to Labour is clear: they have a 20-point increase in voter share compared to this point in the last election. It was at this point in 2017 that the Leave vote began to stagnate and even begin to decline for the Tories, however the polar opposite appears to be occurring with Johnson at the helm.

The Labour Remain vote on the other hand continues to gain more modest support amongst Remainers, similarly to the same way it did in 2017.

Johnson maintains his lead on who would make the best PM, with Corbyn failing to make ground

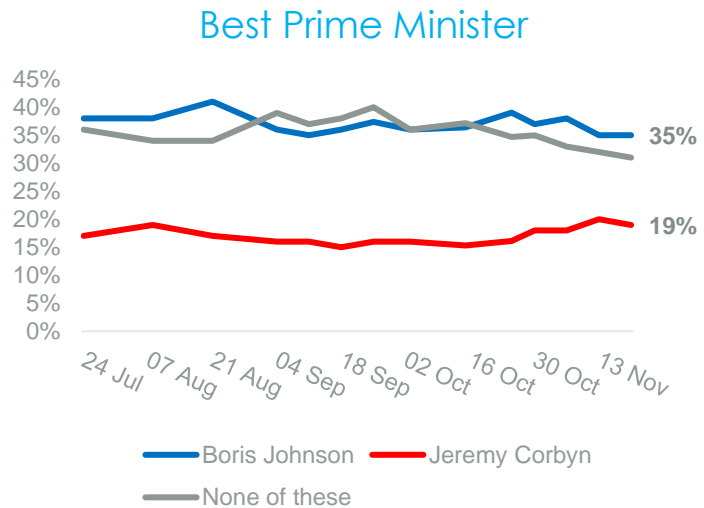
Little has changed after the first TV debate, with 35% continuing to believe that Boris Johnson would make the best prime minister.

Jeremy Corbyn has dropped 1 point since last week, with now 19% thinking he would be the best prime minister.

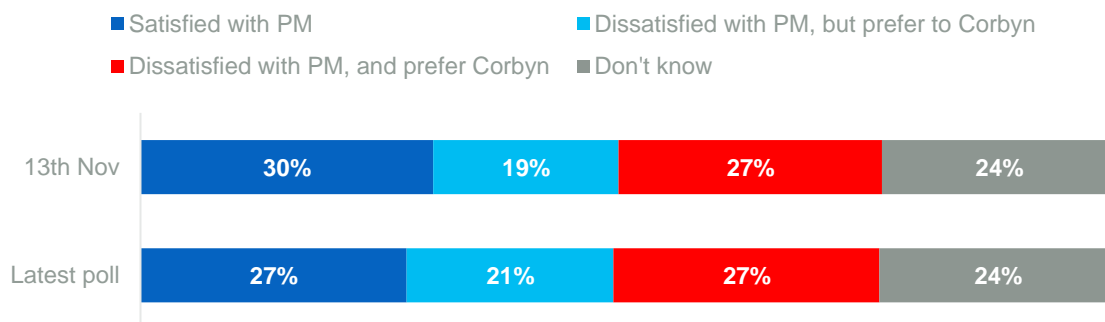
The Labour camp would have hoped that the first ITV debate would have provided an opportunity for Corbyn to start to close the lead on Johnson, however this is yet to materialise.

With just under three weeks left, the public ultimately still appear unimpressed with both candidates, with 31% claiming that neither candidate would make the best prime minister.

Public satisfaction with Johnson has dropped 3 points since last week's poll to 27%, although preference of Jeremy Corbyn remains static at 27%.



Leader preference 2019



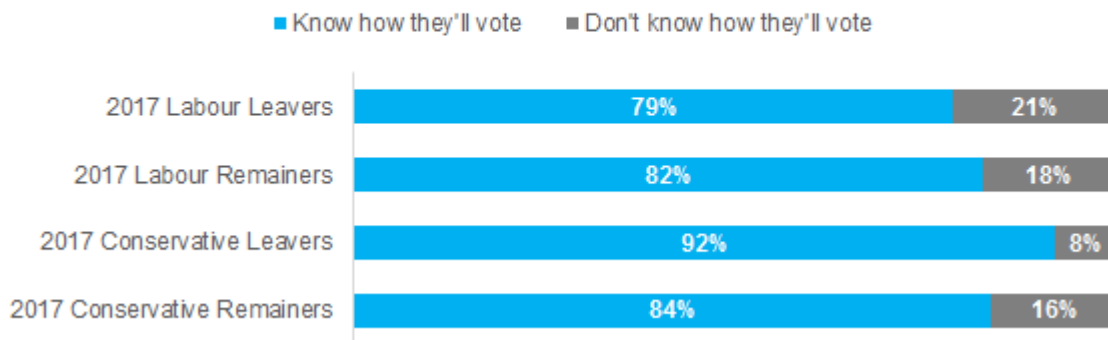
Opinium commentary

After all the party manifesto launches, a Question Time special and a head-to-head leaders debate, the two factors that have driven the early campaign continue to keep that Conservative lead in double figures.

First, the Conservatives continue to monopolize the Leave vote. Secondly, many people simply don't know who they will vote for, unless they are a right-of-center Leave voter, in which case you are a locked down and definitely in the blue column.

Which groups haven't made up their mind yet?

Fieldwork: 20-22 Nov



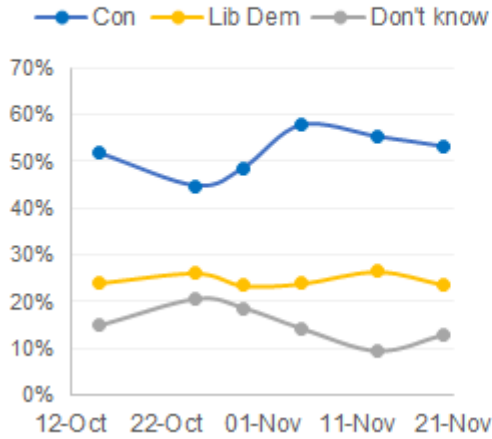
While only 8% of 2017 Conservative Leavers don't know who they would vote for in their constituency, those rises to 18% of Labour Remainers and over a fifth (21%) of Labor Leavers. On one hand, it gives the Conservatives a huge lead amongst the 'decideds', on the other hand, there are a large number of voters who simply don't know if they will switch allegiance next month or return to their traditional Labour home. We can't count them either way currently, what judgements can we make about these don't knows?

There has been a drift back to Labour amongst their Remain wing of voters since the start of the campaign, which could have a sizeable impact on final vote share.

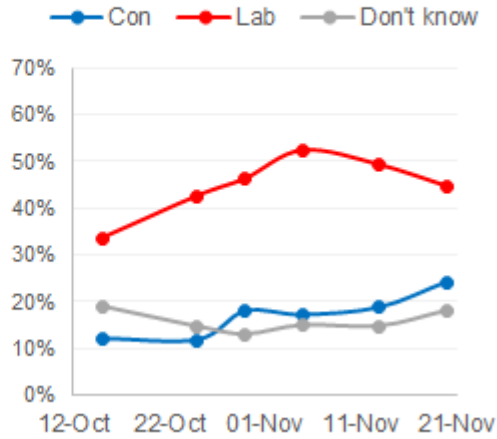
However, Labour's Leave wing has worse news for the party. A quarter (24%) of 2017 Labour Leavers now expect to vote Conservative, which has doubled since this time last month. In short, these 'don't knows' are falling in the wrong direction for Labour.

The bad news for the Conservative Party is the proportion of their 2017 Remain voters planning to back the Lib Dems has not dropped at all. It was 24% in this weekend's poll and it was 24% in mid-October.

Voting intention of 2017 Con Remainers



Voting intention of 2017 Labour Leavers

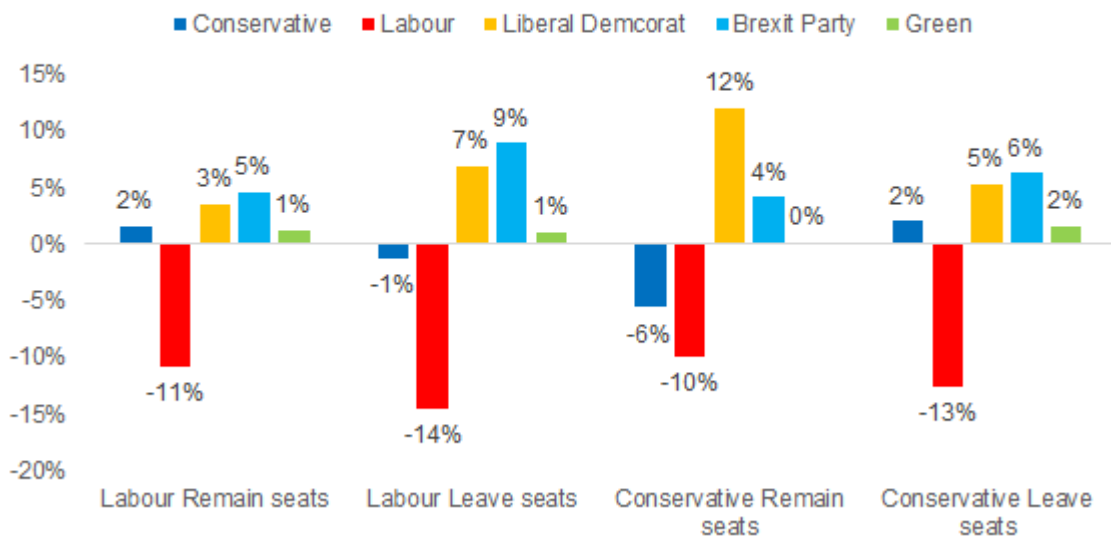


This fractured electorate explains why the Conservatives, despite running a campaign that is trying to be as inoffensive as possible to its traditional core vote, are still reliant on converting those Labour Brexiters.

We drilled down into all the answers to our regular voting intention question over November to assess what is happening in different constituencies. In Conservative held pro-Remain seats in England and Wales, there is a 9% swing to the Lib Dems on average (Conservatives down 6 points, Lib Dems up 12 points). But in Labour Leave seats, Labour are down 14 points while the Tories remain almost steady.

Vote share change by seat type

Fieldwork: 6 Nov - 22 Nov



This near 7% swing to the Conservatives in target marginals will deliver the party far more gains than a 9% swing against them in their southern strongholds will cause losses. Furthermore, these numbers do

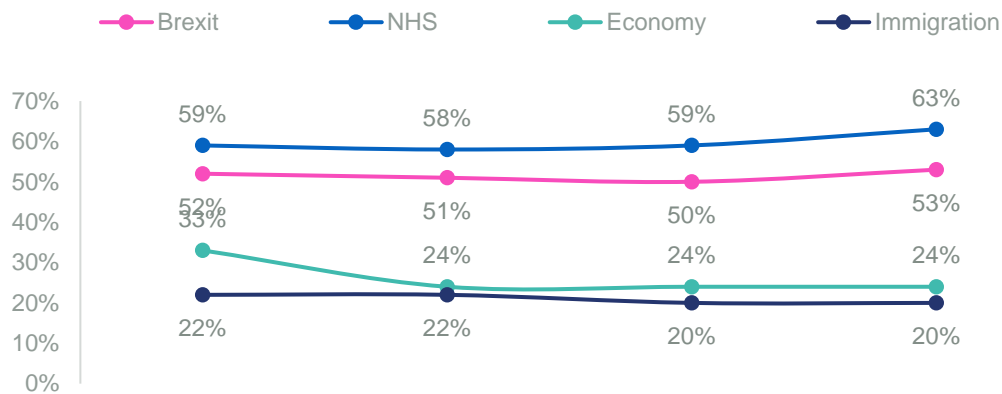
not factor in the Brexit Party standing down in Conservative seats, which is likely to return a good 3 to 6 points in the Conservatives' favour across the board.

Even if the national Conservative lead closes when (and if) those undecided left-wing Remain voters back Labour at the last minute, it is unlikely to change the key story of this election in either the Conservatives defences in Surrey or their targets in places like Stoke.

How this election will be fought

Despite the NHS being the most important issue facing the country, Brexit remains the issue on which voters are most likely to base their vote

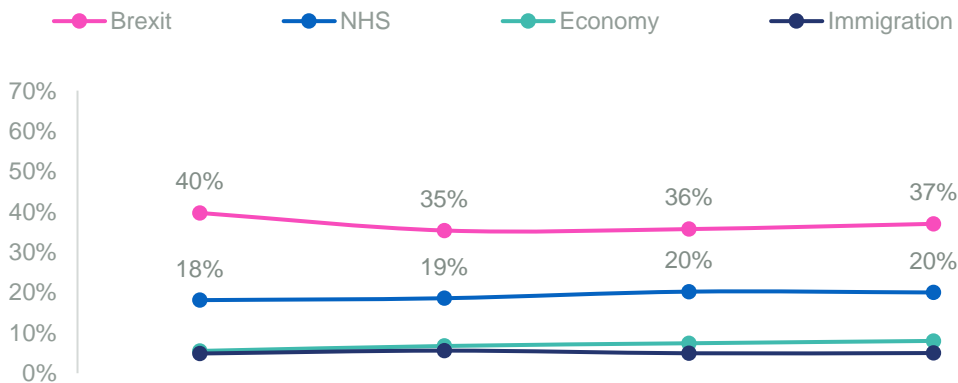
Top 3 issues facing the country
 (30 Oct / 6 Nov / 13 Nov / 20 Nov)



The NHS remains at the forefront of voter’s minds as the largest issue facing the country, however Brexit is stubbornly the issue that matter most to the public when thinking about the ballot box.

With a 17-point difference between the issues, it would appear that Corbyn has been unable to weaponize the NHS, or other domestic issues for that matter, in the minds of voters.

Issue most likely to base vote on
 (30 Oct / 6 Nov / 13 Nov / 20 Nov)

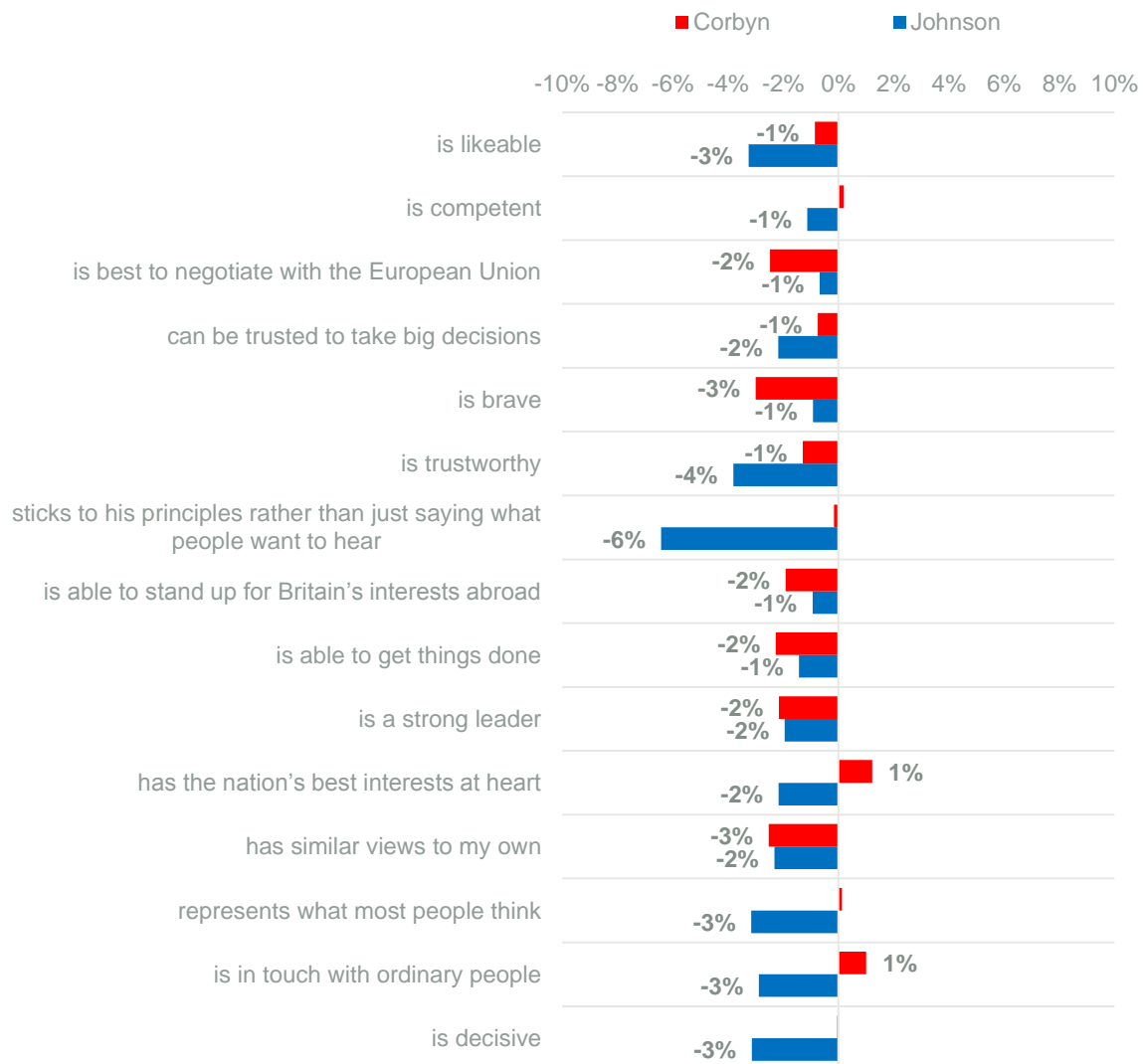


This is because for both Leave and Remain voters, Brexit takes priority over all other issues. Therefore, it is unsurprising that the Conservative tactic of coalescing and hardening a core base of Brexit voters is bearing fruit in overall voting intent figures.

A view on the Leaders

Perceptions of Johnson and Corbyn have not improved in light of their first head-to-head debate

Difference in leadership perceptions
 (NET difference vs. last poll)



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It is striking that neither politician was able to improve perceptions of themselves over the last week, with Corbyn only able to improve perceptions of having the nation's best interests at heart and being in touch with ordinary people by one point each. On the other hand, Johnson has lost 6 points on the perception that he sticks to his principles and 4 points on being seen as trustworthy.

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 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 overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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