

General Election 2024 - What happened?

Monday 8th July | 11.00-12.00 | Zoom



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Common





Key takeaways

A fragmented electorate

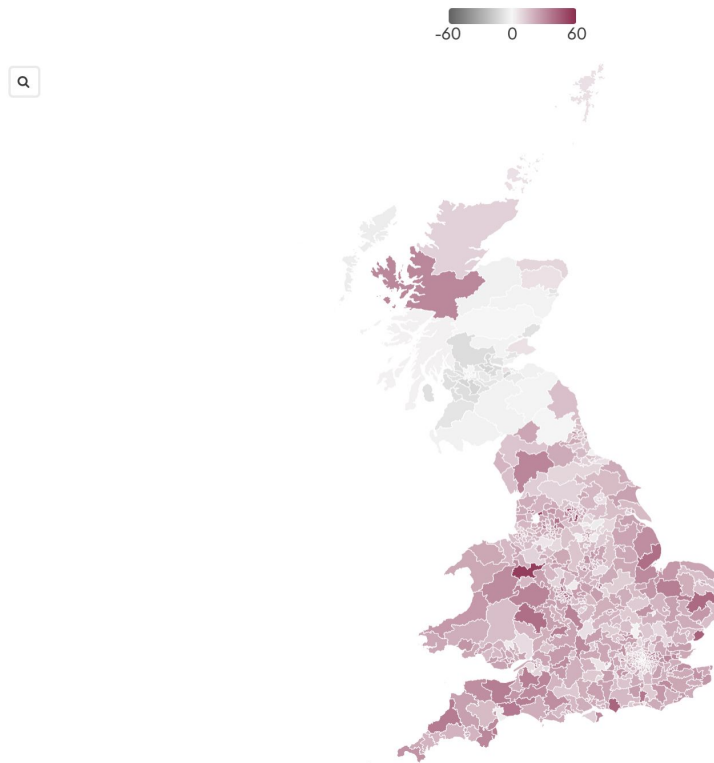
While Thursday's election delivered an historic turnaround for the Labour party since its 2019 defeat and a landslide victory, under the surface, the most consequential story of the election is the **increasing fragmentation of the British electorate**.

The 2024 Election returns both the lowest two-party seat share and vote share since 1923.

And this increasing splintering has happened on both the left and the right.

Where did smaller parties outperform?

Change in combined vote share of all parties excluding Conservatives and Labour



Clear demand to change the status-quo

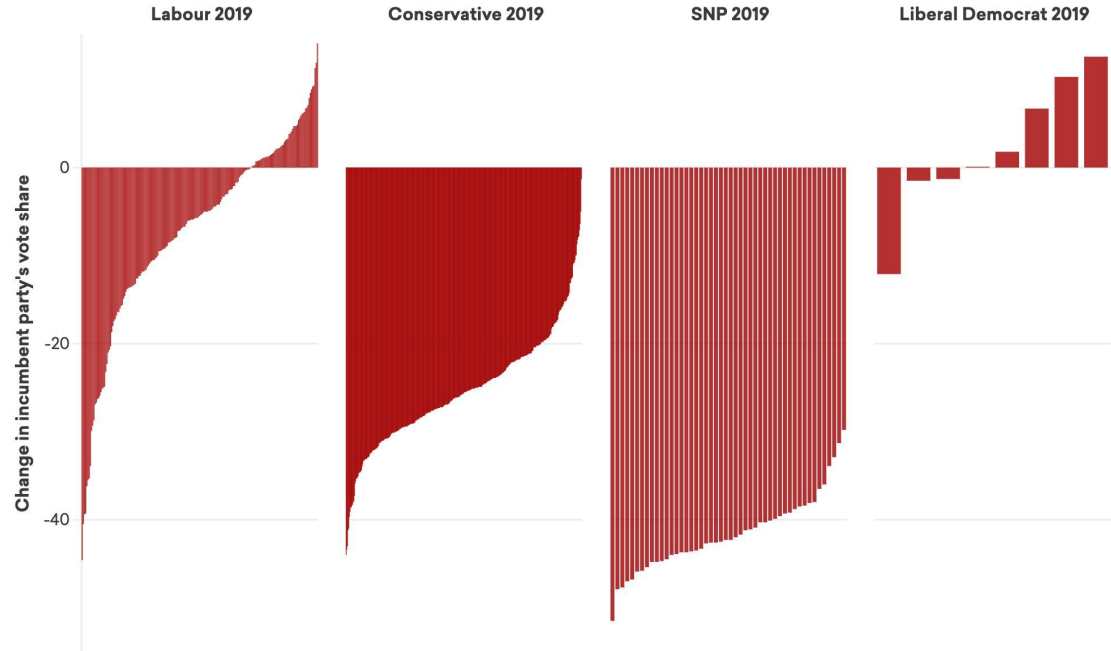
Voters in constituencies across the country wanted change.

Across most seats held by the Conservatives, the SNP and Labour in 2019, the incumbent party lost votes at this election.

The only exception to this is the Liberal Democrats who were more likely to gain votes in the seats they held in 2019 than lose votes.

The public's demand for change was not just directed at the Conservatives, but demanding change to the status quo across the board. In that regard this election is better thought of as a continuation of 2016 and 2019.

Incumbent parties lost vote share in the vast majority of UK constituencies

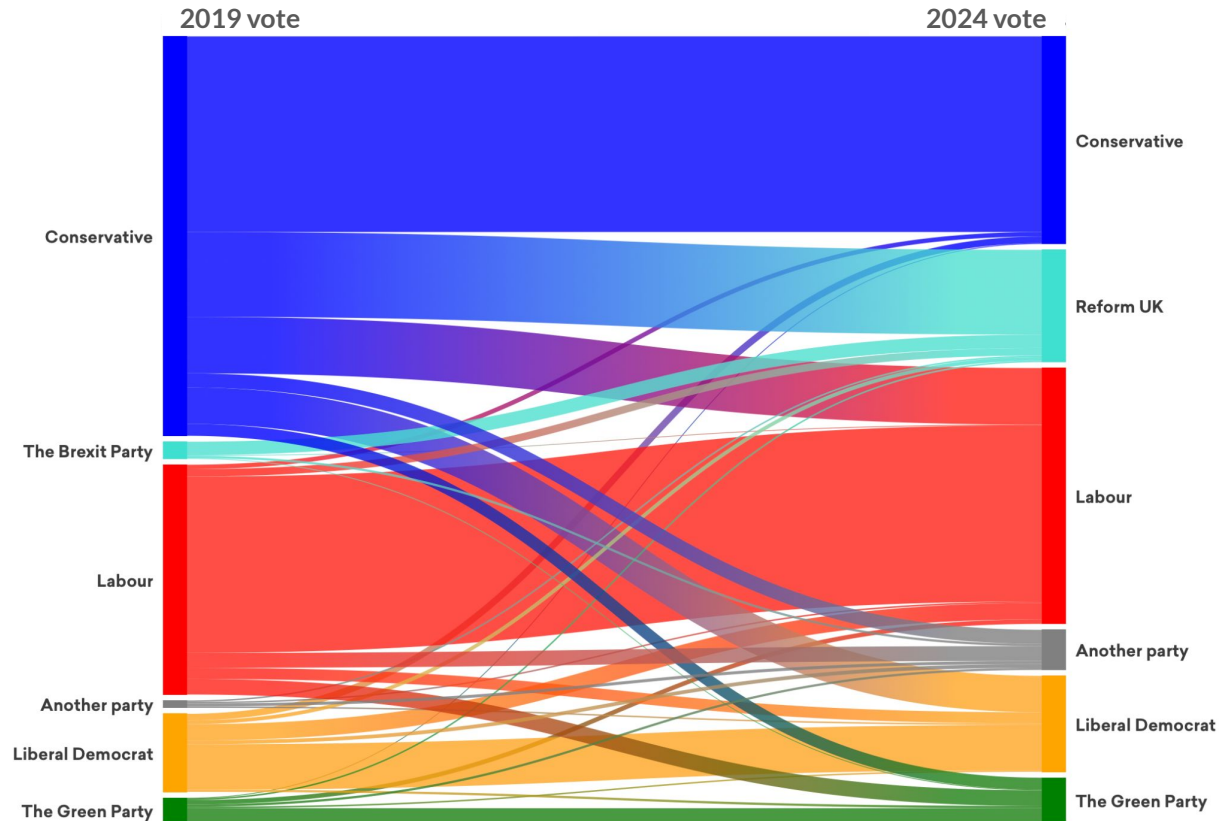


2024: A splintering electorate

Looking at the 2024 vote shares by 2019 vote, the splintering of the electorate across the left, right and centre is striking.

So too is the change in the dominance of the two largest parties whose combined vote share is down significantly on 2019.

It's in this context that Labour was able to secure a larger victory in terms of seats from a much lower vote share than the Conservatives in 2019, and a lower number of absolute votes than 2019.



A triumph of voter efficiency

Labour has lost seats where it could afford to lose them and gained votes in seats it needed to win to gain a workable majority.

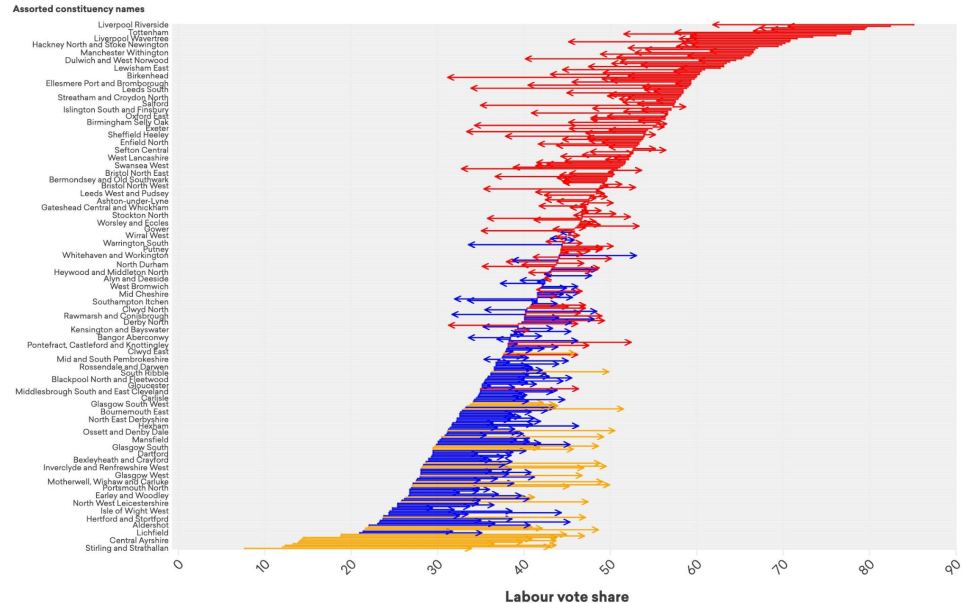
Labour's vote share fell across the board in seats they hold from 2019, with almost all increases happening in newly gained seats.

However, the SNP's very efficient distribution of the vote in 2019 where they won 45 seats, was reduced to 9 seats in this election. This shows the precariousness of a voter efficiency strategy in terms of marginality - an effect likely to shape Labour's approach in government.

It also means that it would take just a 6% swing to the Conservatives for Labour to lose its majority.

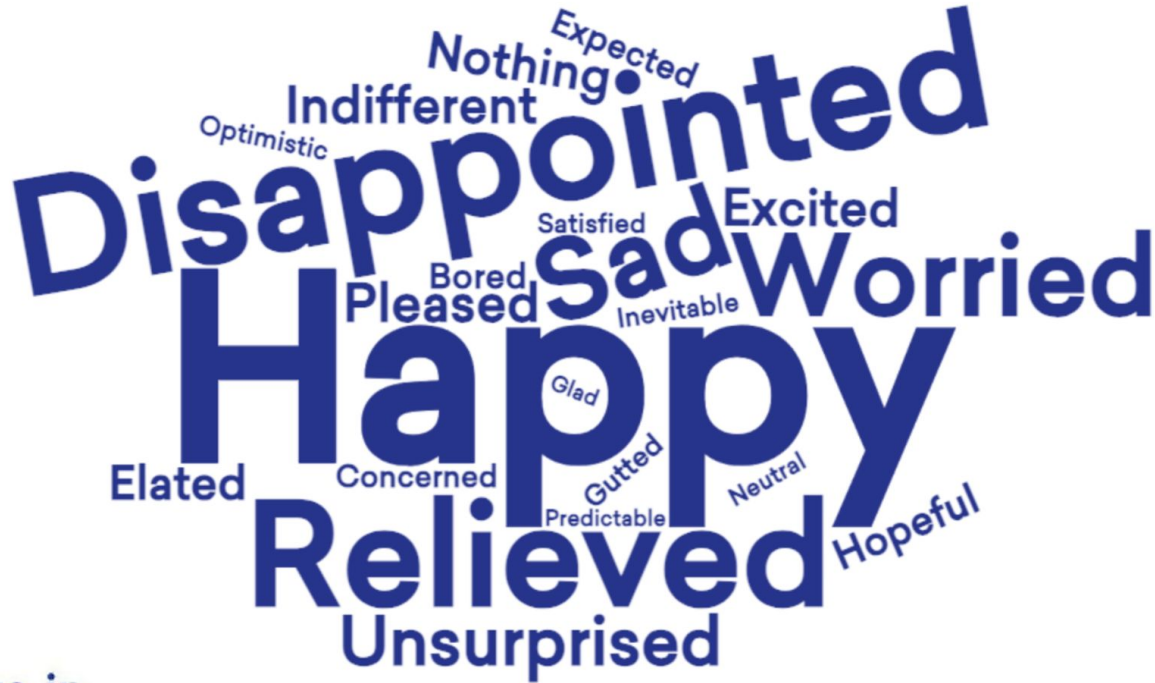
Changes in Labour vote share since 2019 All Labour wins in 2024

2019 winner ● SNP ● Con ● Lab



The public's post-results verdict

In a word or two, what emotion describes how you feel about last night's election result?



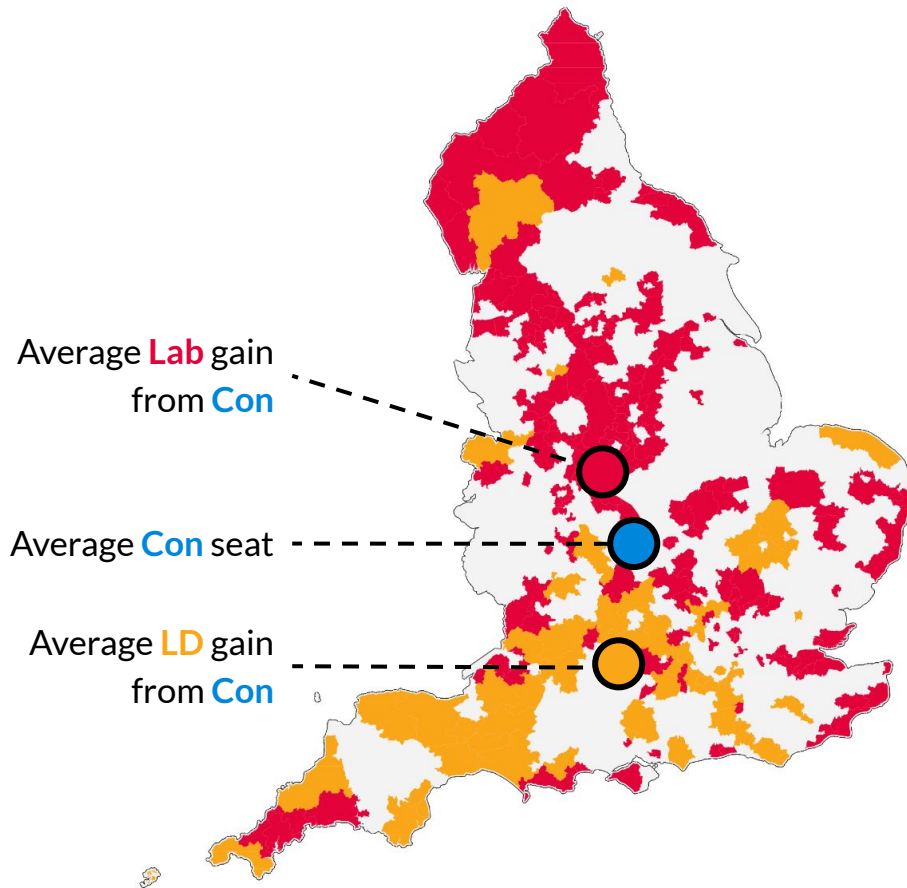
Britain's changing electoral geography

Unlike in 1997, the Conservatives have not retreated south. The centre of gravity of the Conservative Party in England is Daventry (Northants) - the same as it was in 2019.

What happened is that the Conservative coalition was burnt at both ends. Labour regained many 2019 Conservative seats in the North. And at the same time the Liberal Democrats are taking hold in the South.

The centre of gravity of Labour's gain from Conservatives is Nuneaton, 100 miles north of the average Lib Dem gain in Newbury.

From an electoral perspective, the "median" seat won by the Conservatives by vote share was Farnham and Borden, for Labour it was Wakefield and Rothwell, and for the Liberal Democrats it was Chesham and Amersham.



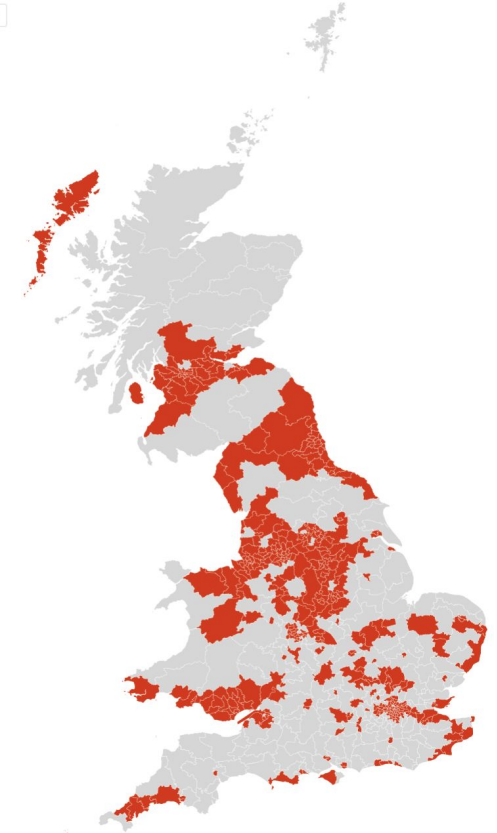
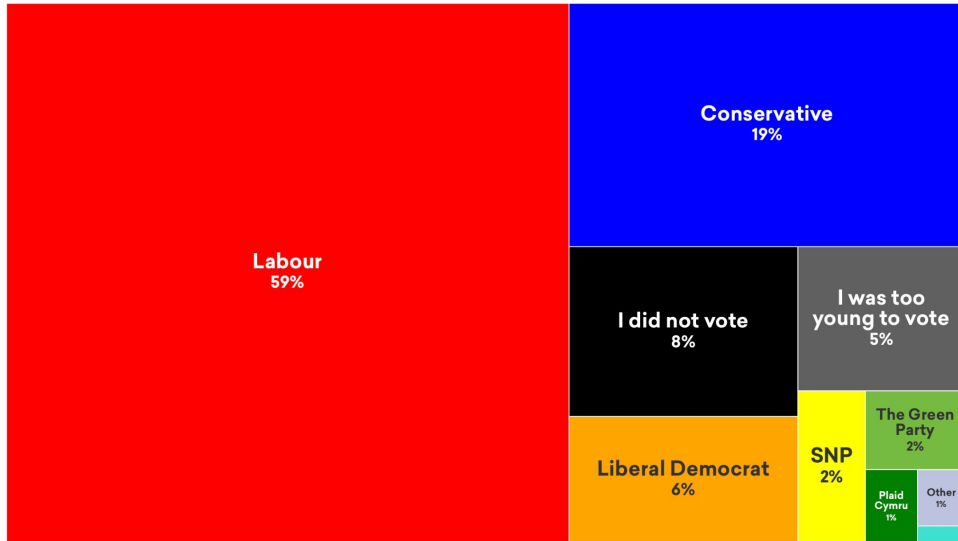


**The challenge of keeping
the new electoral
coalitions together**

Labour's new coalition

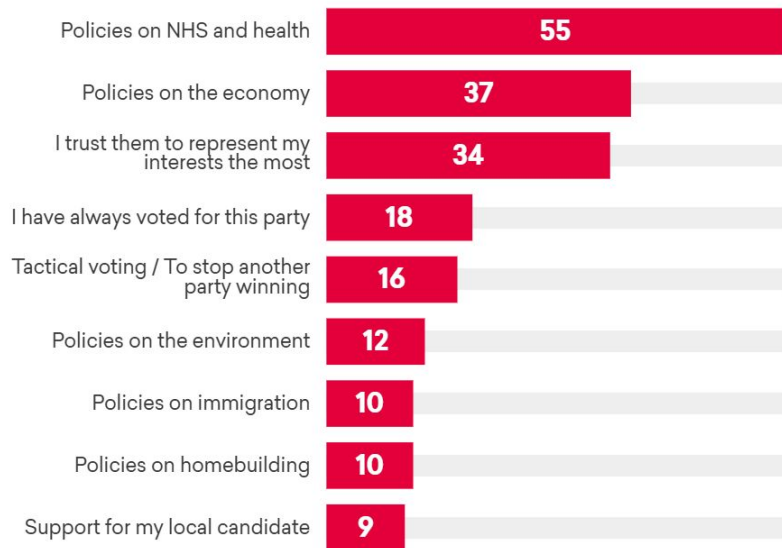
Who is the typical 2024 Labour voter? He's likely a 44 year old man who went to university and now lives in a city. Despite working full time, he has been struggling to make ends meet.

2019 Vote of 2024 Labour Voters

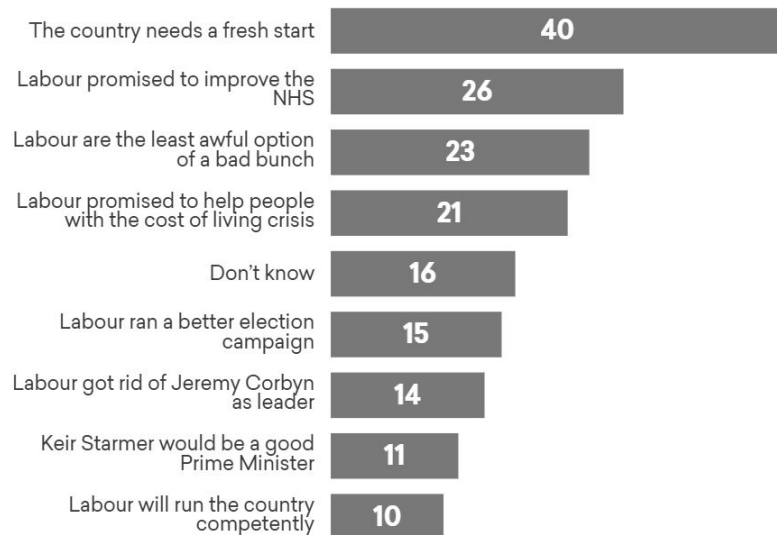


NHS key driver of Labour 2024 victory

You said you voted for Labour. What made you vote for that party? Select up to three reasons.



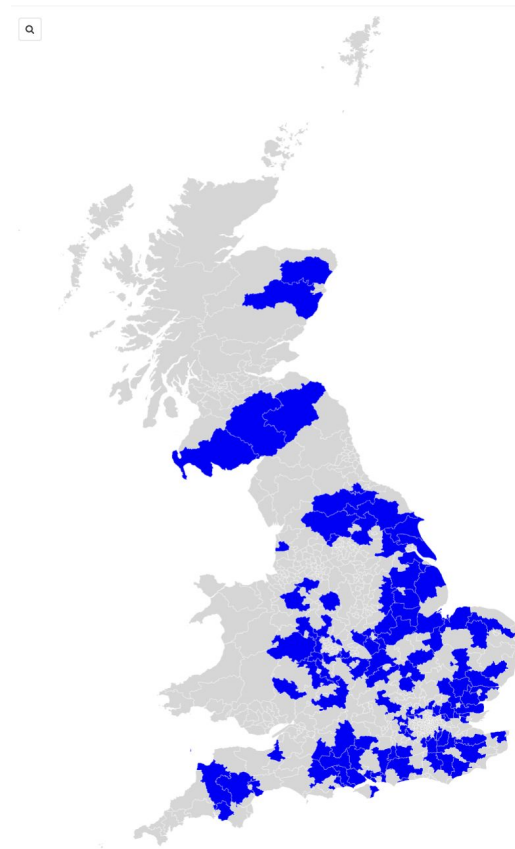
What do you think were the biggest reasons that Labour won so many seats this election? Select up to three.



2024 Conservative voters

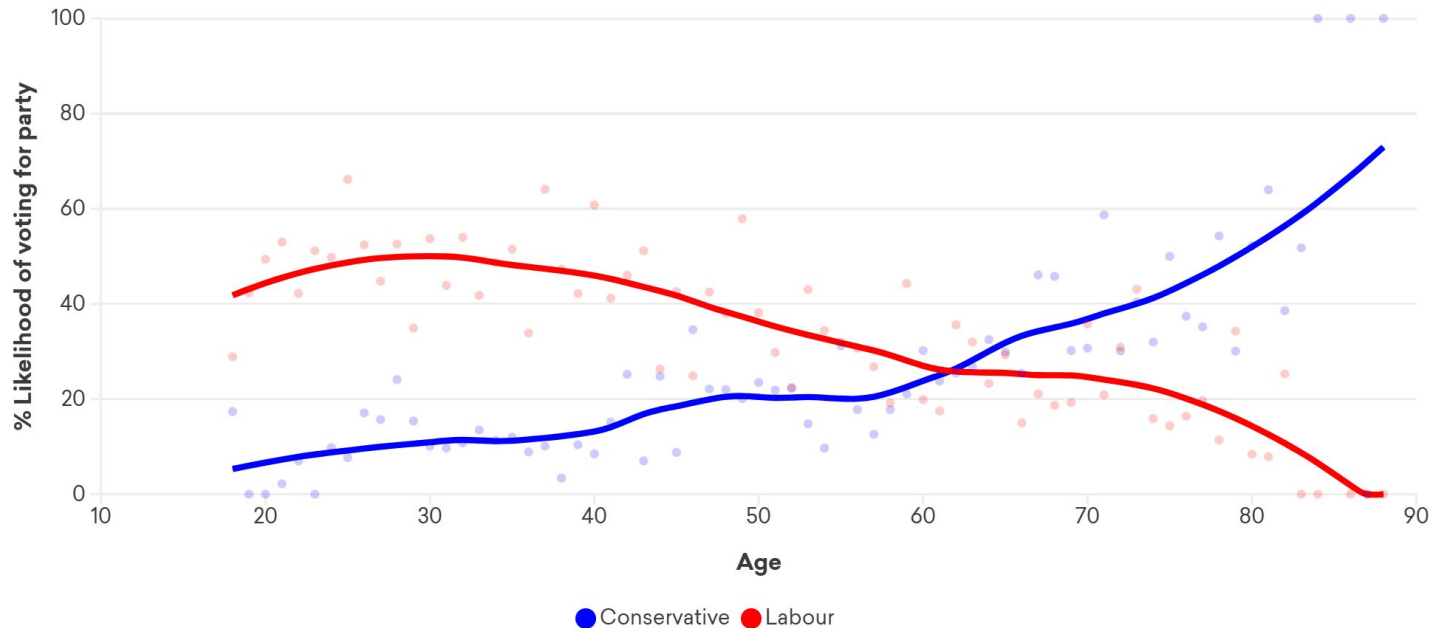
Who is the typical Conservative voter? They are 65 years old, white, Christian and retired. They didn't go to university and live in a small town. Financially, they're comfortable and own their home.

2019 Vote of 2024 Conservative Voters



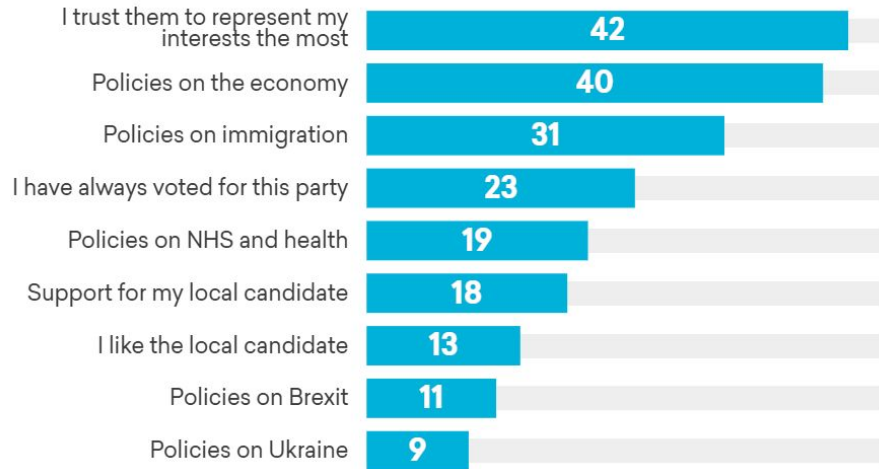
The Labour-Tory age crossover is now 62 - up from 39 in 2019

General Election 2024 Vote by Age

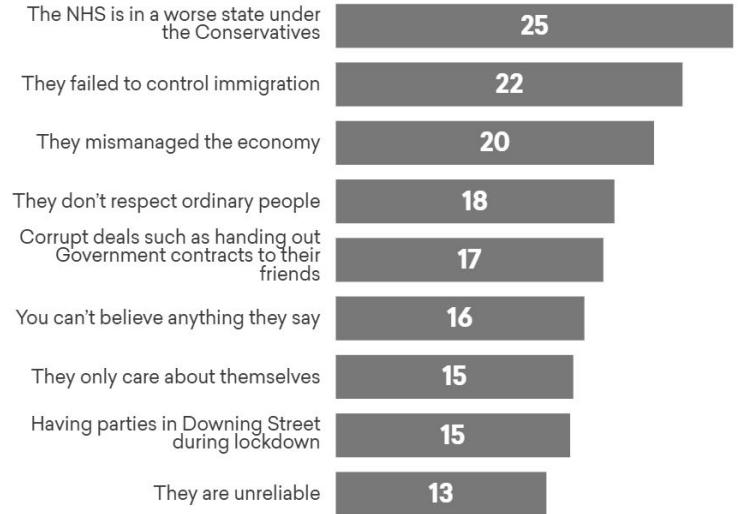


Tory voters backed the party on economic management, the electorate attribute their defeat to the NHS & immigration

You said you voted for the Conservatives. What made you vote for that party? Select up to three reasons.



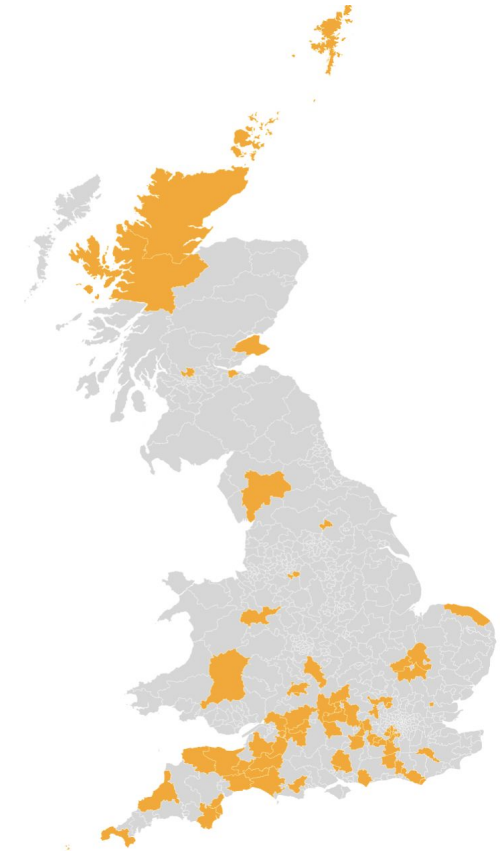
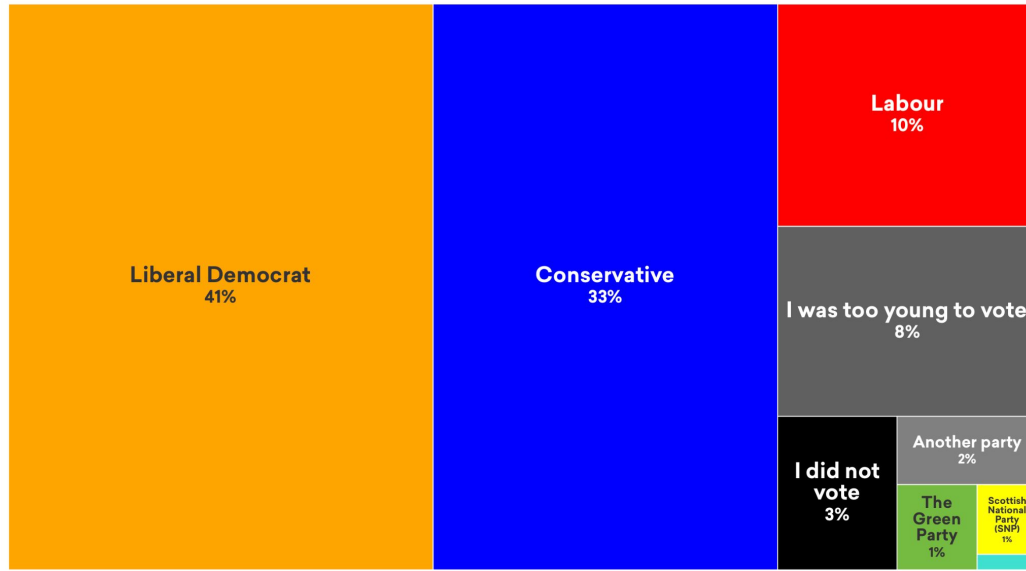
What do you think were the biggest reasons that the Conservatives lost so many seats this election? Select up to three reasons.



2024 Liberal Democrat voters

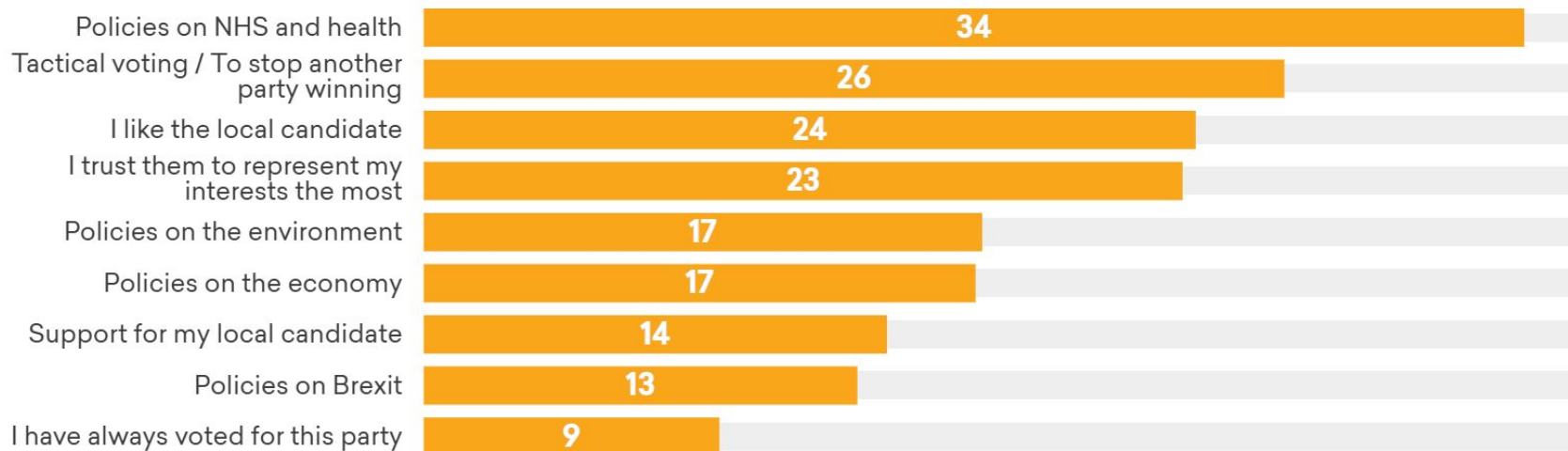
Who is the typical Liberal Democrat voter? She's likely a 57 year old woman who voted Remain. She lives in a village in the South.

2019 Vote of 2024 Liberal Democrat Voters



The NHS and stopping the Tories drove the Liberal Democrat vote

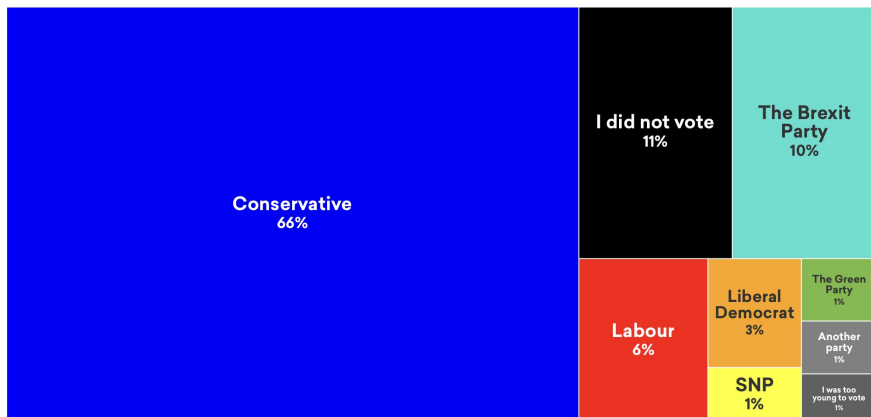
You said you voted for the Liberal Democrats. What made you vote for that party? Select up to three reasons.



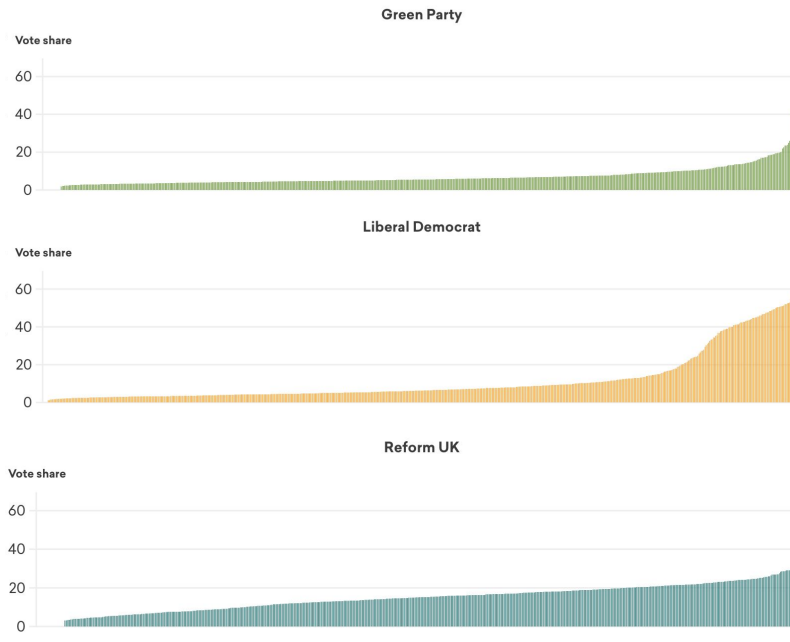
Reform UK's 2024 voters

Who is the typical Reform voter? A white 55 year old man who voted Leave. He probably lives in a village and didn't go to university.

2019 Vote of 2024 Reform Voters



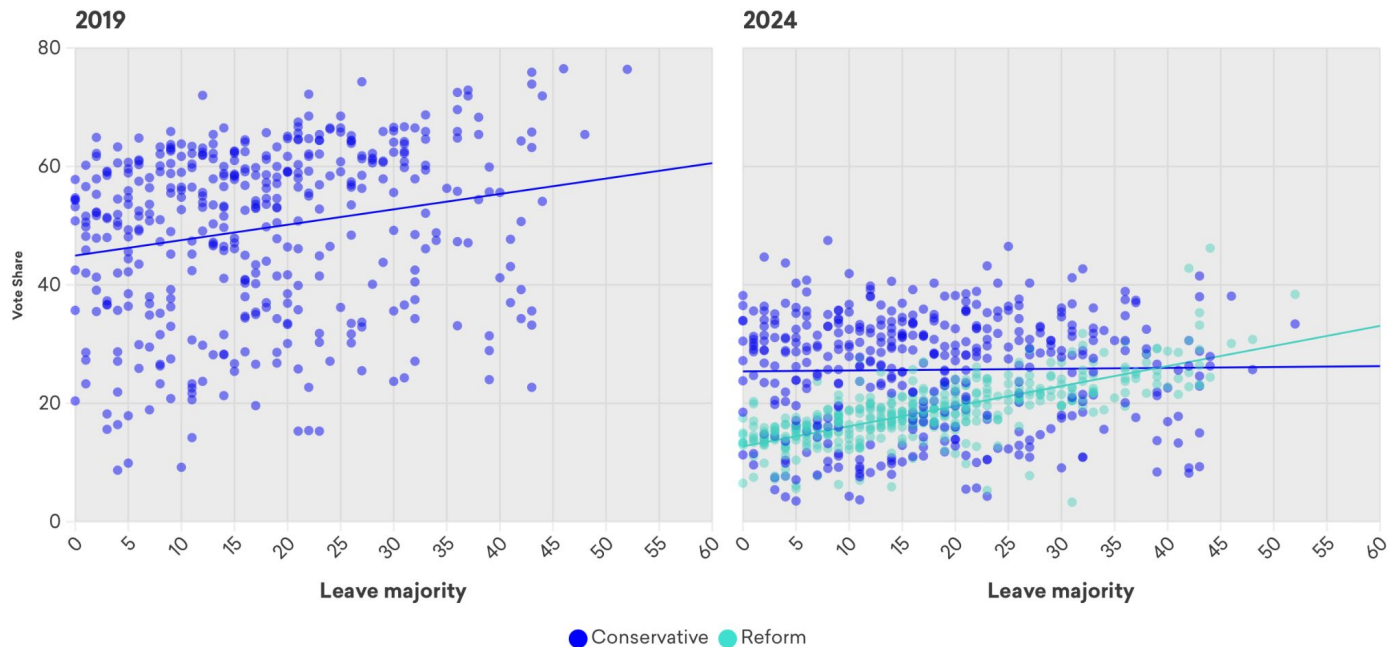
Reform's vote share is more evenly (and inefficiently) distributed than other secondary parties



The enduring relationship between Brexit and Reform

The relationship between a constituency's EU referendum vote and party vote share has diminished for Conservatives but affects support for Reform

Only Leave voting constituencies shown



Immigration is top concern for Reform voters

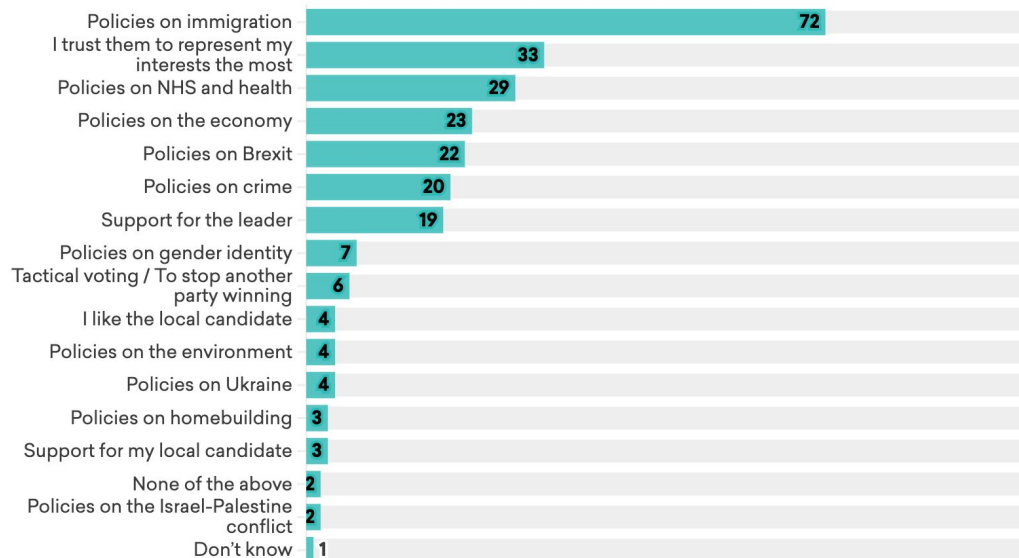
While immigration is a top concern for many Reform UK voters, the overwhelming view of this group of voters in focus groups is that they think the system is not working and part of Farage's appeal to these voters is his ability to challenge the system.

"I mean I'm not against immigration. We need immigrants, we need them, we need the workers, but it's the illegal immigrants which the other parties, conservatives haven't managed to stop the votes coming in. I'm sure Labour won't do it either. So it's a hot topic and he seems to be focusing in on that as his main topic."- John, Retired, Clacton

"When he's getting milkshakes thrown at him and he's getting rocks thrown at him on an open top bus, you've got to commend him because he's going out there and the others aren't doing that. They're all protected in studios and stuff like that. He seems to know how to talk to normal people."- Carol, Unemployed, Grimsby

I think what this country has become is disgraceful. I'm no longer proud to be British. Unfortunately everything has been reduced to the bare bones, our education system, our economy, our NHS, just what is the policing?"- Debs, Mental Health Support Worker, Aldershot

You said you voted for Reform UK. What made you vote for that party? Select up to three reasons.

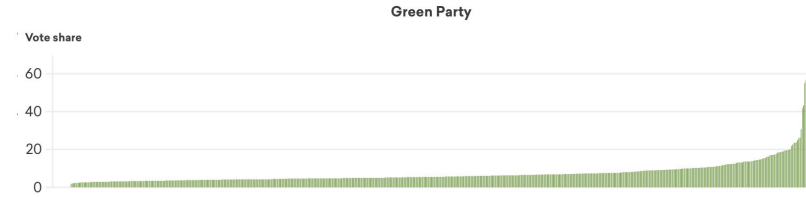


Holding the Green coalition together

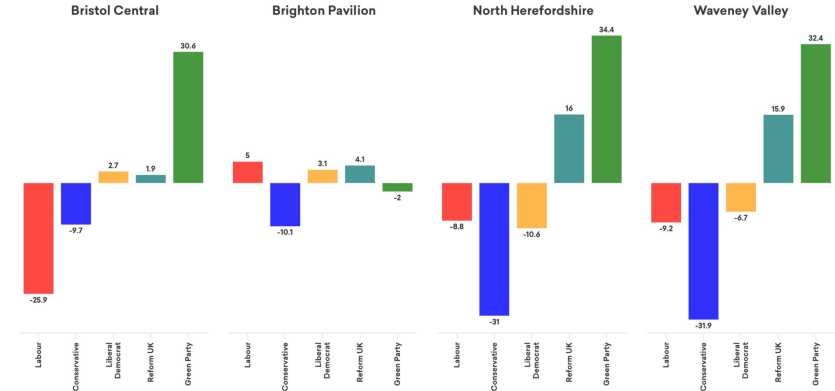
The Green Party's vote distribution was very efficiently distributed towards the four seats that they were targeting in this election and much more efficiently distributed than Reform UK vote. There are also now 39 seats where the Green Party is in second place to Labour.

However, given the different perspectives of the seats they've won (Bristol/Brighton and Waveney Valley/North Herefordshire) shows the challenge the Greens face in both holding these latter two seats (which were notionally Conservative seats), while making gains in their second place seats which are all to Labour.

Further analysis of the Green voter coalition coming next week.



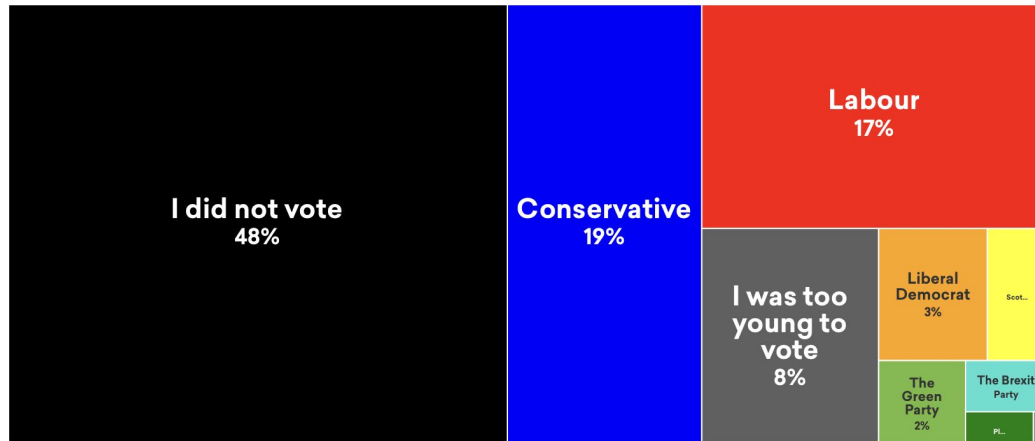
Changes in vote share with 2019 in four Green seats (+/- with 2019 notional)



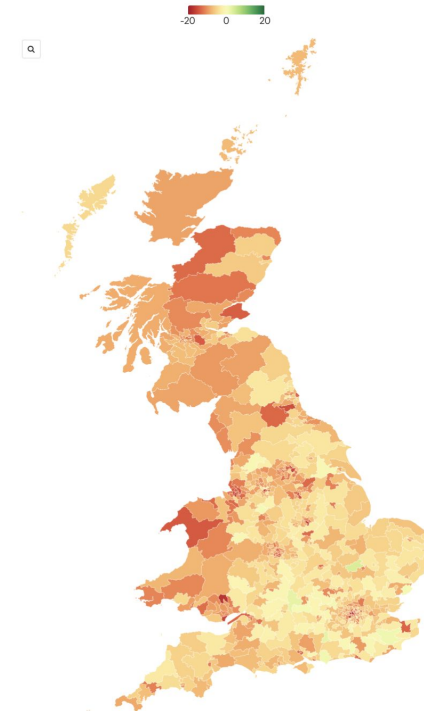
A low turnout election

From the 2019 election, turnout fell by 8% nationally and came in at 60% nationally - second lowest since 1885, with only the 2001 general election having a lower turnout. In Wales and Scotland, there was an even larger drop. In almost 60 constituencies, turnout was under 50%. Conservative 2019 voters were more likely to vote again this time around than Labour 2019 voters. Fewer than half of those who say they vote in most but not all elections voted last week.

2019 Vote of 2024 Non-voters



Change in Turnout (2019 to 2024)



Who is the typical non-voter? She is 43 years old, with no qualifications beyond school. She rents her home in a small town and is struggling with the cost of living.



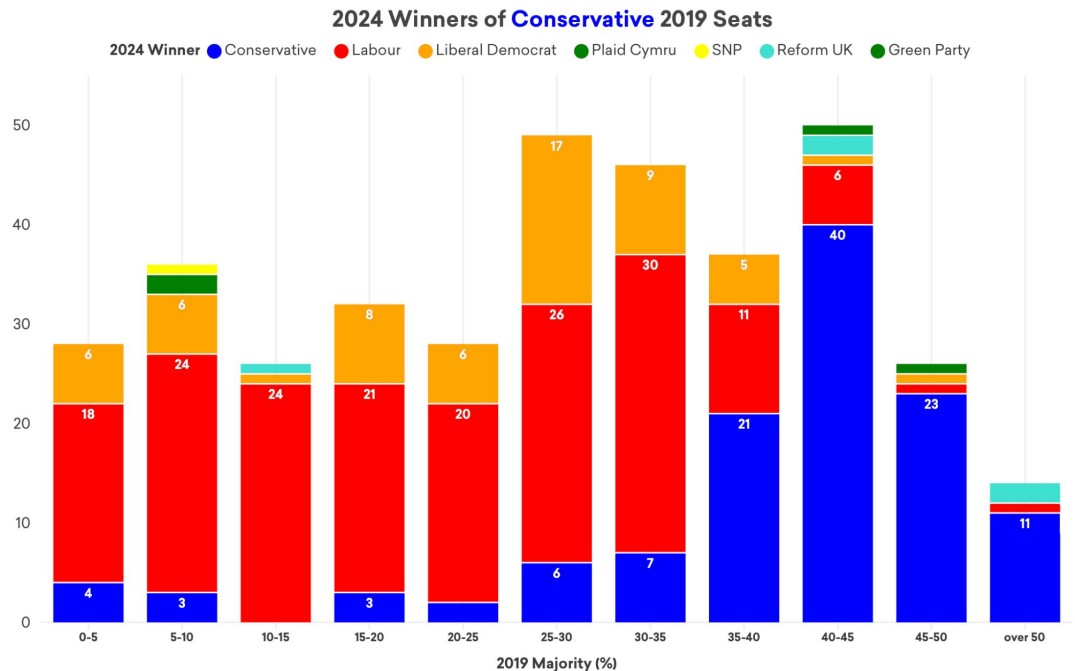
What happened in 7 key stories

The end of the 'safe seat'

The voter volatility of recent elections heightened in this election - a dynamic which affects both Labour and the Conservatives and explains some of the record breaking swings on election night.

Labour won in areas which it has never been competitive before, but also suffered shock losses in some of its safest seats. Senior cabinet ministers hold precarious majorities at the next election.

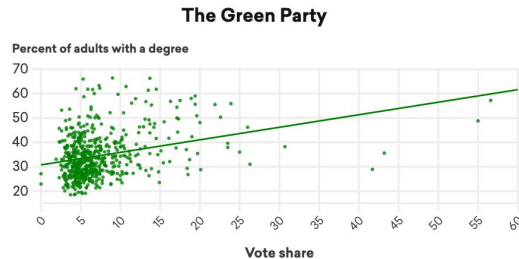
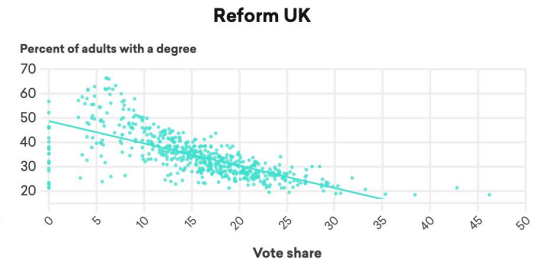
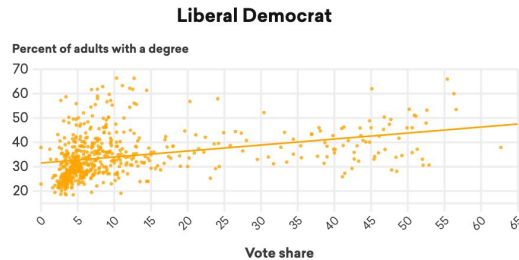
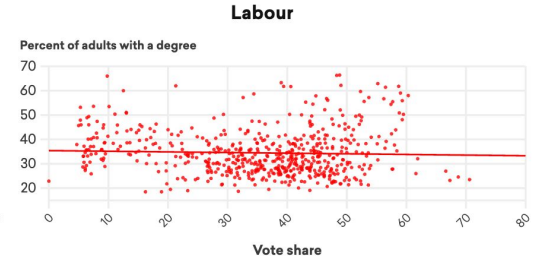
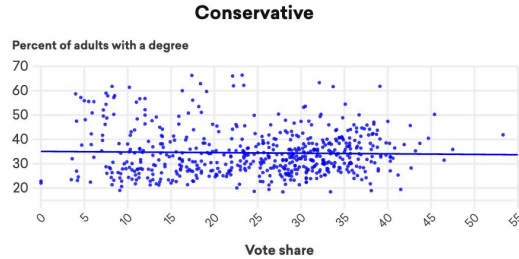
A big Conservative majority was no defence against Reform UK. While the Liberal Democrats held all of their by-election gains



Voter by education - realignment is here to stay

In 2019, the Conservative Party performed much better with voters with no degree, whereas this year their education gradient is virtually flat.

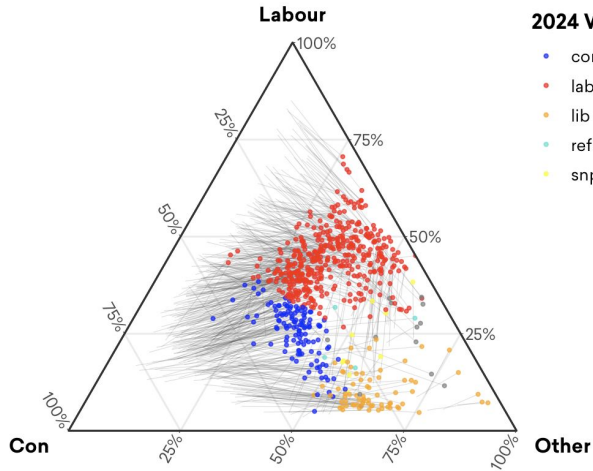
On the other hand, Reform UK has performed much better in places with fewer graduates, where the Greens and Liberal Democrats performed much better.



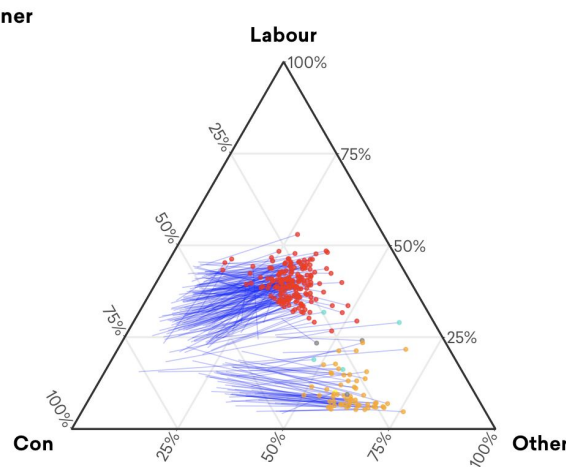
The gravitational pull of third parties

Conservative losses are most driven by the rise of third parties (both the Liberal Democrats and Reform) rather than direct or upward movement to Labour. Similarly, Labour gains are driven by third parties splitting votes in the seats the Tories were defending rather than seeing major rises in Labour vote shares. Independent candidates also dented the Labour vote share. The exception here is Scotland where there were clear swings to Labour.

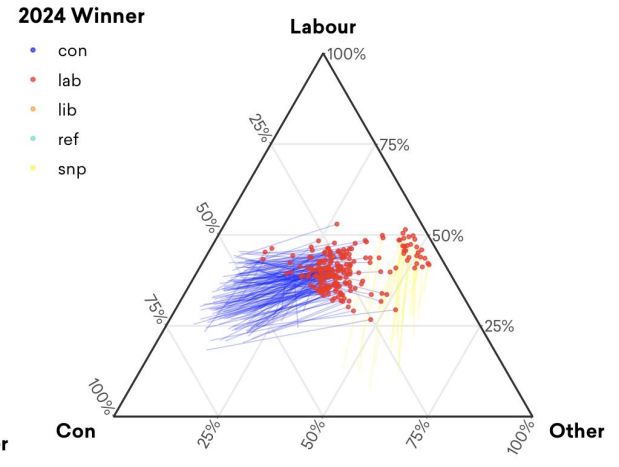
Changes in vote share since 2019



Change in vote share since 2019
Conservative LOSSES only

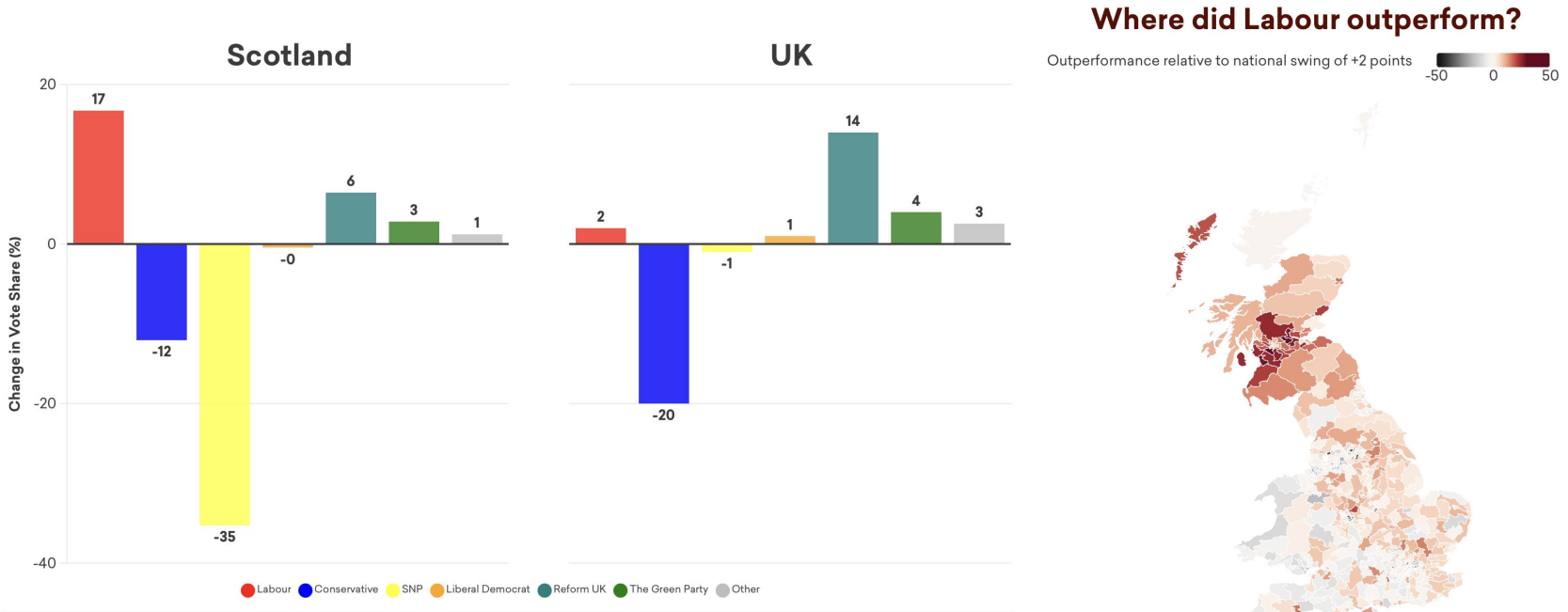


Change in vote share since 2019
Labour GAINS only



SNP collapse and Labour overperformance in Scotland

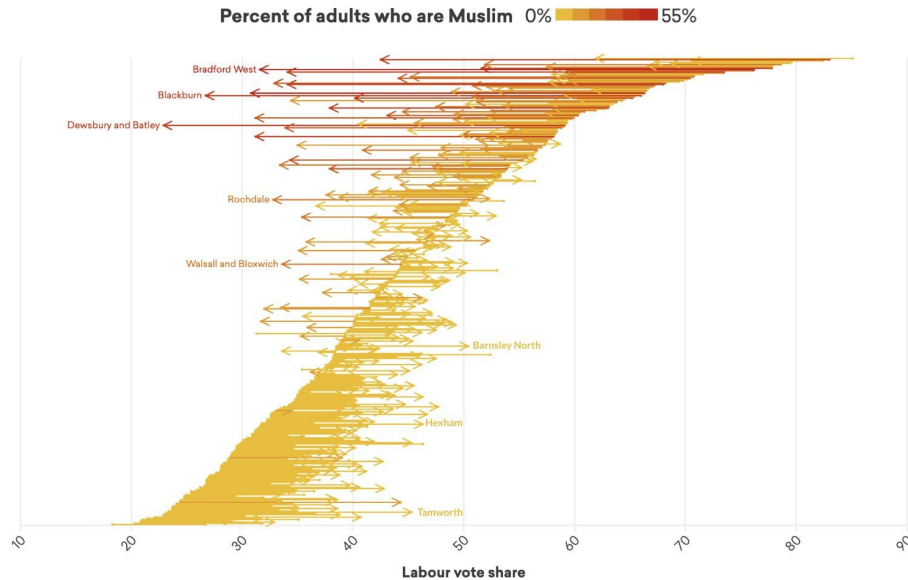
The SNP's loss of 39 seats at this election was as dramatic as their gaining 50 seats at the 2015 general election. The SNP-Labour swing on Thursday's election was 26 points. This is both shaped by SNP collapse (-35 on vote share), but also Labour overperformance in Scotland.



Was this the Gaza election?

All of the biggest swings against Labour on election day happened in seats with the biggest Muslim populations

How the Labour vote changed since 2019, by constituencies' Muslim population



Gaza matters - but it's not the only issue

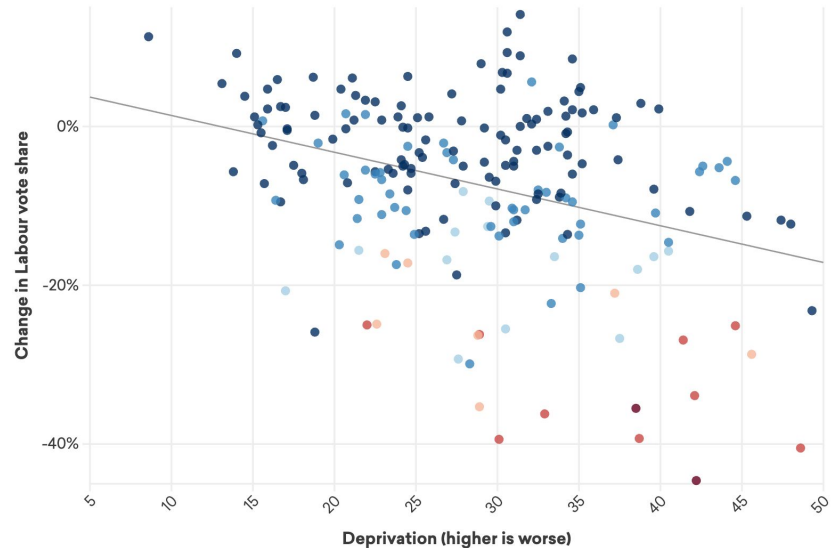
Gaza clearly matters to many voters in Muslim areas, but in our focus group research with British Muslims, it's clear that their shift away from the Labour Party goes further than Gaza.

For these voters who've loyally backed the Labour party, they blame for taking them for granted and neglecting their local area which feels increasingly run-down and deprived.

For example in Rochdale, the enduring effect of the closure of the maternity unit at Rochdale Hospital, the closure of McDonalds, and frustration that no one comes to Rochdale to shop anymore.

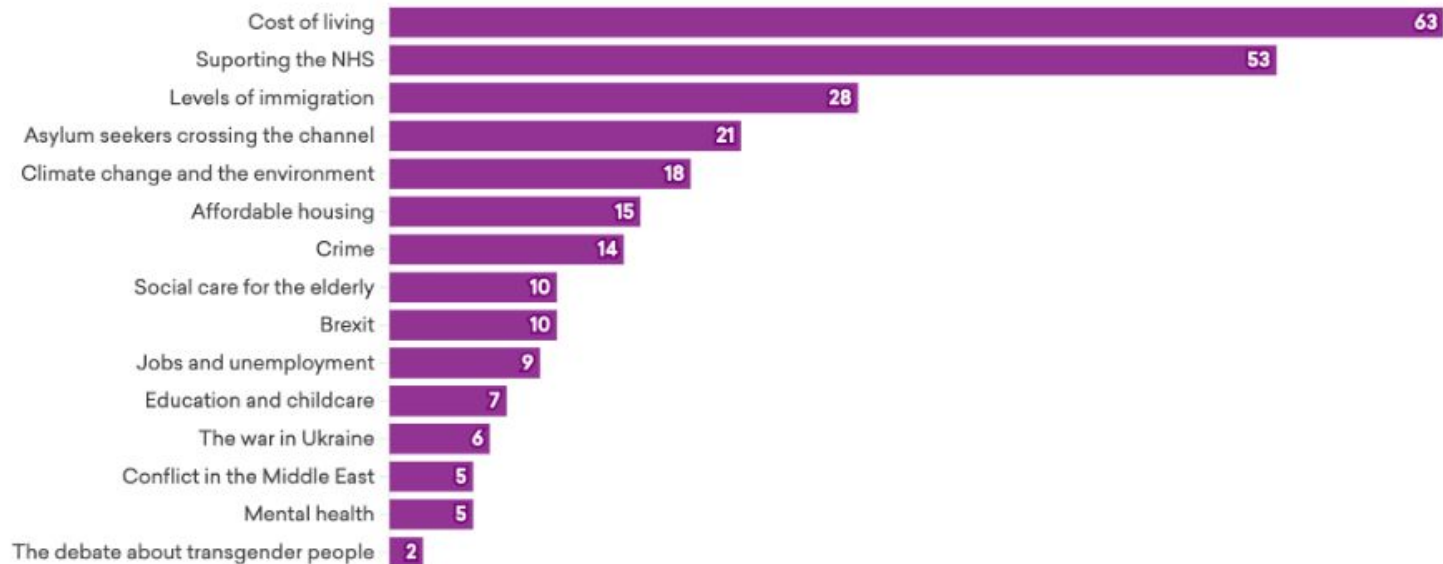
More deprived areas swung the most away from Labour, but this was more pronounced in the most Muslim areas

Percent of adults who are Muslim 0.3% ■■■ 53.9%



The immigration election? A top issue, but pales in comparison to cost of living and NHS

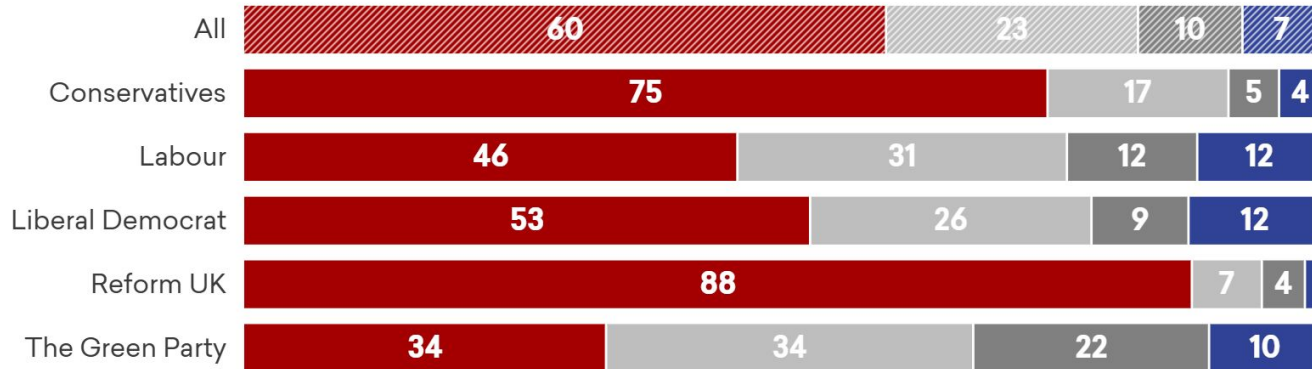
Thinking about the General Election, which of the following issues had the biggest impact on how you voted? Please select up to three



The public want to reduce net migration

Thinking about the number of immigrants the UK Government accepts into the country each year, which of the following comes closer to your view?

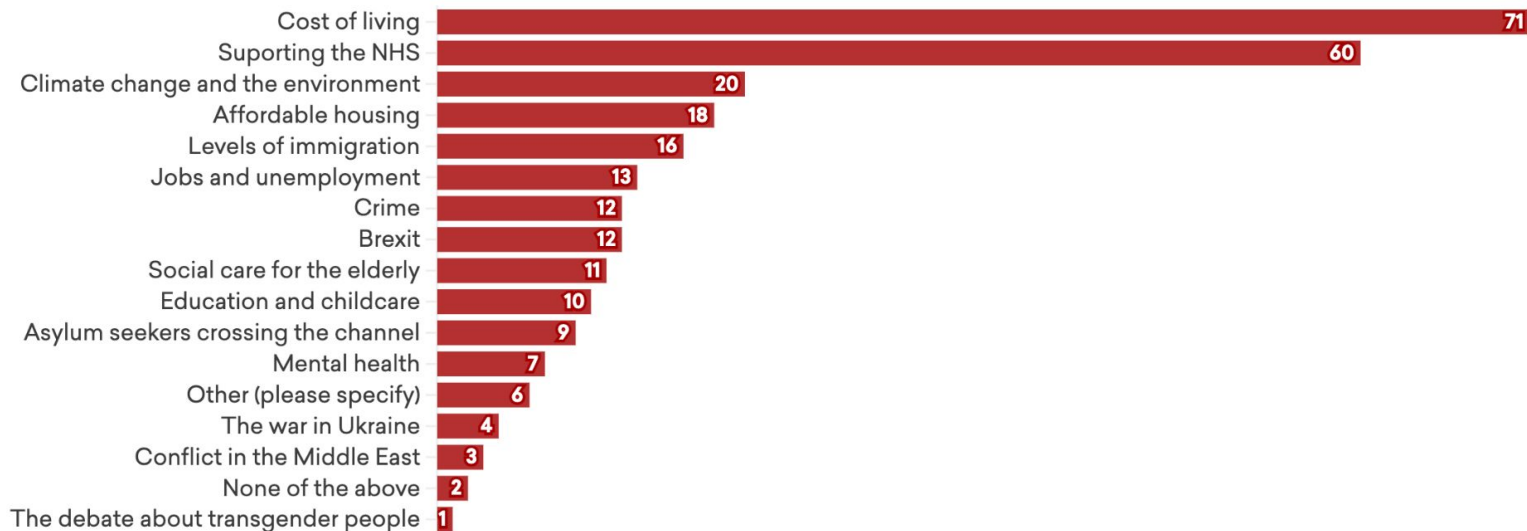
- Government should reduce the numbers
- Government should keep the number the same
- Don't know
- Government should increase the numbers



A climate election? Clear mandate with Labour voters on climate

Thinking about the General Election, which of the following issues had the biggest impact on how you voted? Please select up to three

Labour and Liberal Democrat voters only

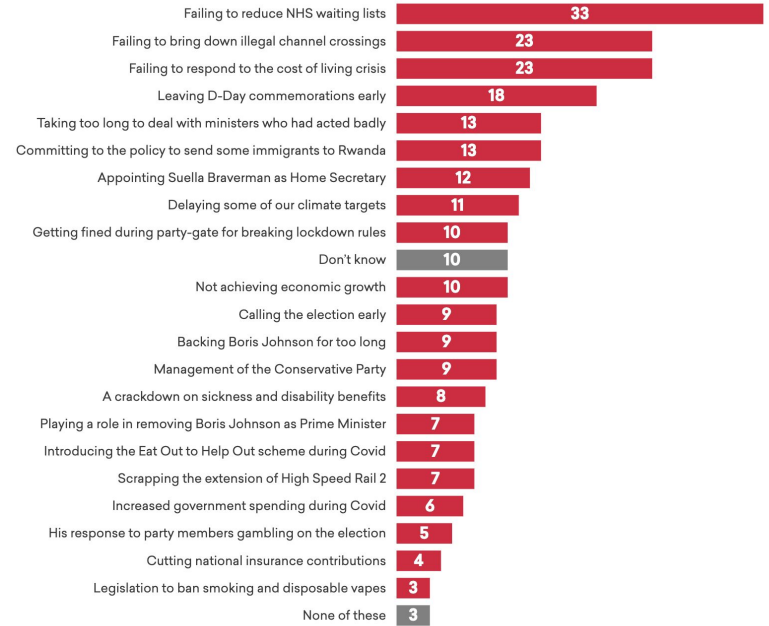


Most see Sunak's climate delays as a mistake, and few see it as an achievement

Thinking back on Rishi Sunak's time in government, which of the following have been his best achievements? Select up to three.

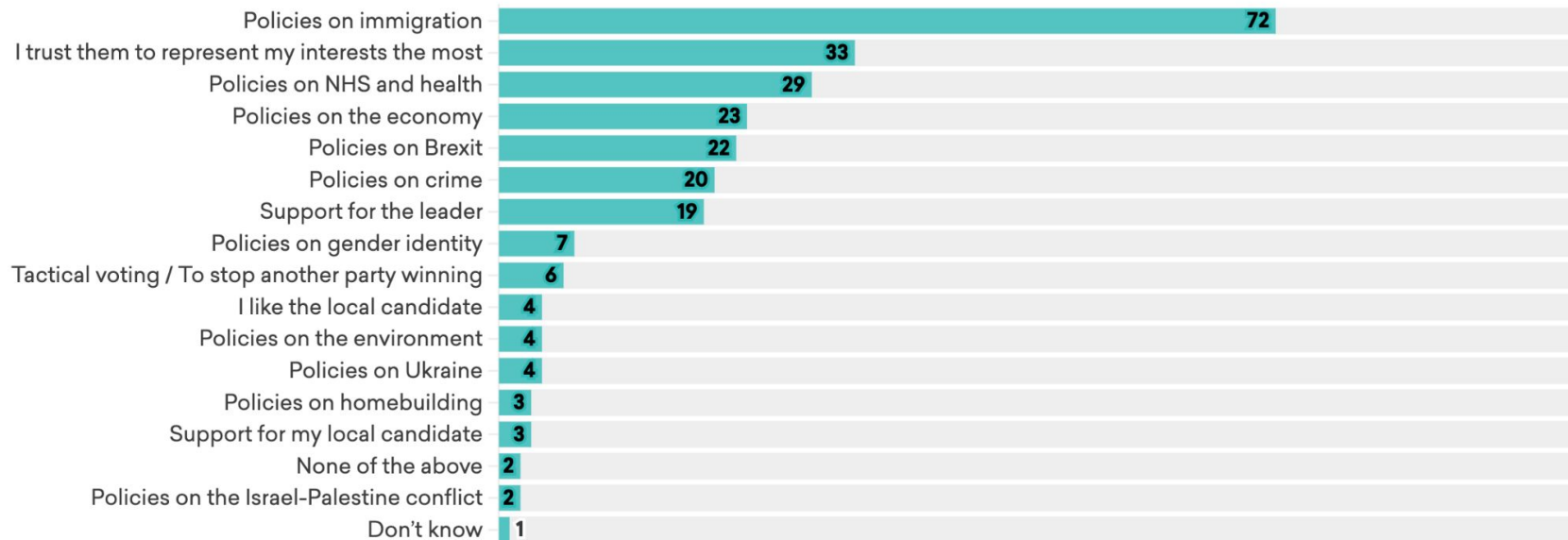


Thinking back on Rishi Sunak's time in government, which of the following have been his best mistakes? Select up to three.



Reform voters vote on immigration, not climate

You said you voted for Reform UK. What made you vote for that party? Select up to three reasons.



Support for GB Energy is high across board

Do you think Labour's pledge to set up Great British Energy, a publicly-owned clean power company will be...

- Very good for the country
- Good for the country
- Neither good nor bad for the country
- Don't know
- Bad for the country
- Very bad for the country



Is 2024 a re-run of 1997?

While the government's current majority (172) is very similar to New Labour's first majority (178), there are some clear differences:

Labour loses seats - including some very safe seats

The rise of third parties on both the left and the right

Conservatives retain seats in Scotland and make a gain in Leicester East and hold seats like Keighley and Stockton West

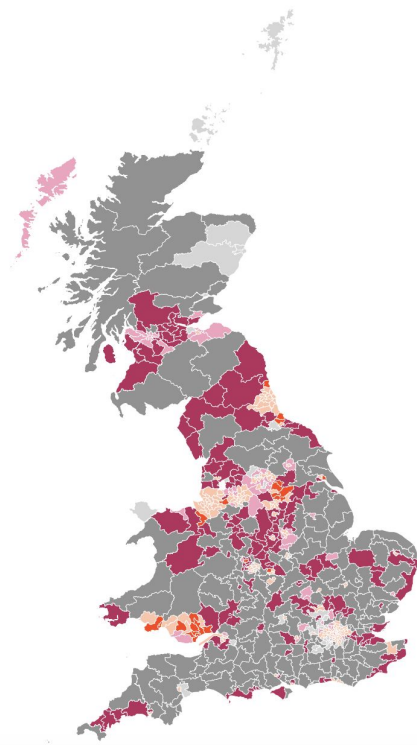
Clear differences in external economic context - little optimism



Challenges for Labour

Starmer is personally unpopular in many of the seats Labour won

- Labour gain, Starmer popular
- Labour gain, Starmer unpopular
- Labour hold, Starmer popular
- Labour hold, Starmer unpopular
- not a Labour win, Starmer popular
- not a Labour win, Starmer unpopular



Our MRP model of Starmer's approval ratings shows that Starmer is only popular in 269 seats across the country.

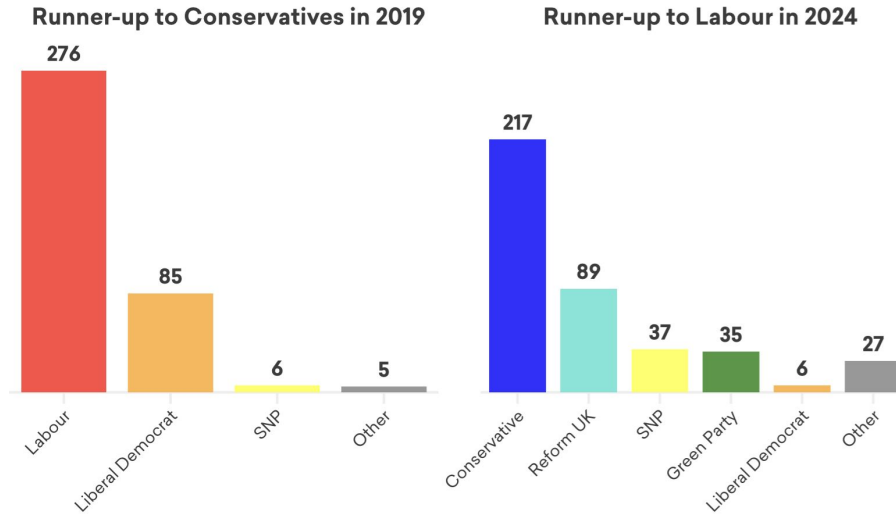
Of the 412 seats that Labour won, Starmer is unpopular in 181 of those.

This poses a challenge for the new government in shifting perceptions in these seats as it sets out its governing agenda.

Multi-faceted opposition

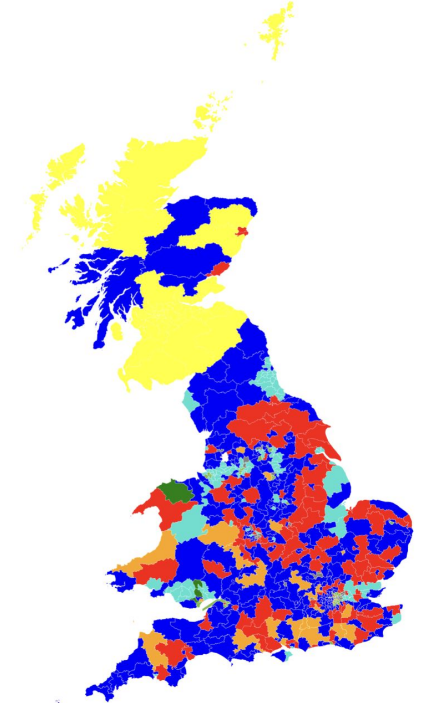
Unlike in 2019, there are a wider variety of parties which are second place challengers in each constituency. By the next election, the context could change or it could be important base to build from locally.

Labour's coalition is surrounded on all sides



Second place party by constituency

Legend for the map:
Reform UK (light blue), Labour (red), Conservative (dark blue), Scottish National Party (SNP) (yellow), Liberal Democrat (orange), Plaid Cymru (green), Other (grey), Green Party (dark green)



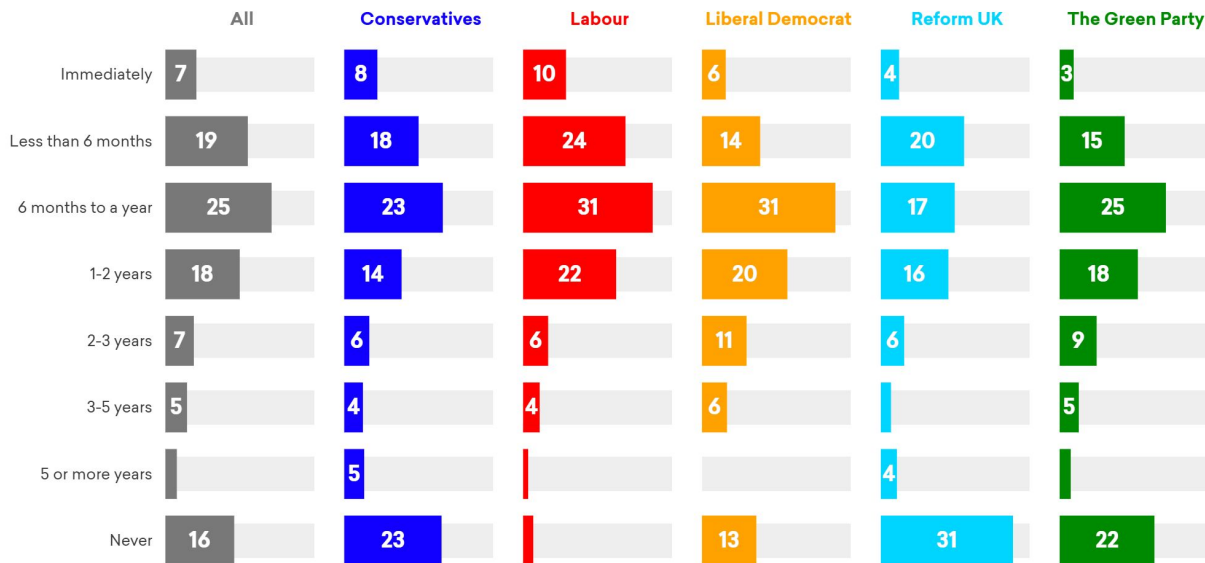
Voters don't give the government much time to change things

A plurality of voters (43 per cent) give the Labour party between 6 months and two years before they start seeing a difference from Labour's policies in government.

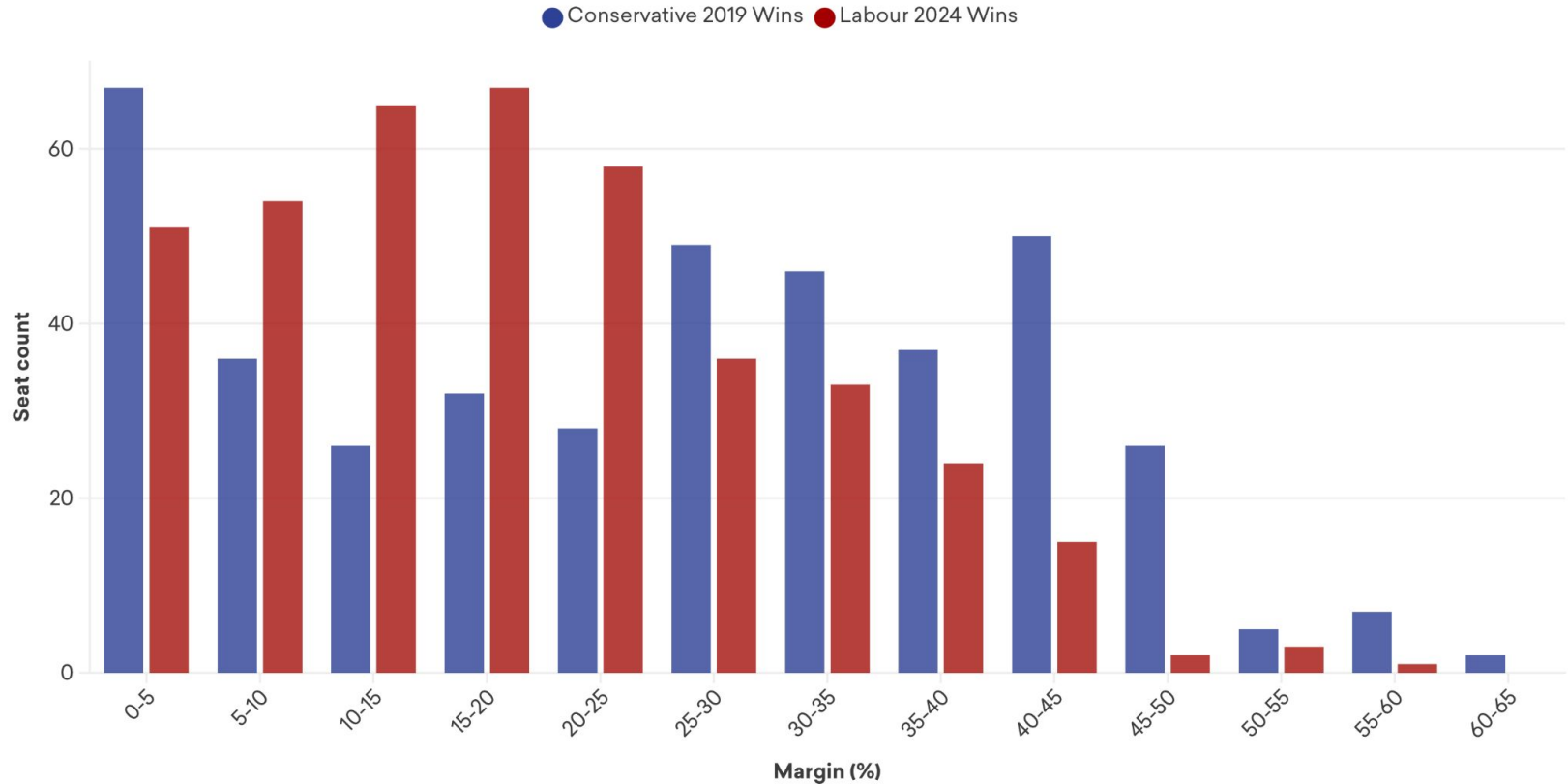
A quarter (26 per cent) are more impatient and want to see a difference within 6 months of their taking office.

More than a fifth of Green, Conservative and Reform UK voters have low expectations for the new government said they never expect to see a positive difference from Labour's policies.

After how long do you expect to start seeing a difference from Labour's policies, if at all?



Labour's 2024 majority is more precarious than the 2019 Conservatives' majority



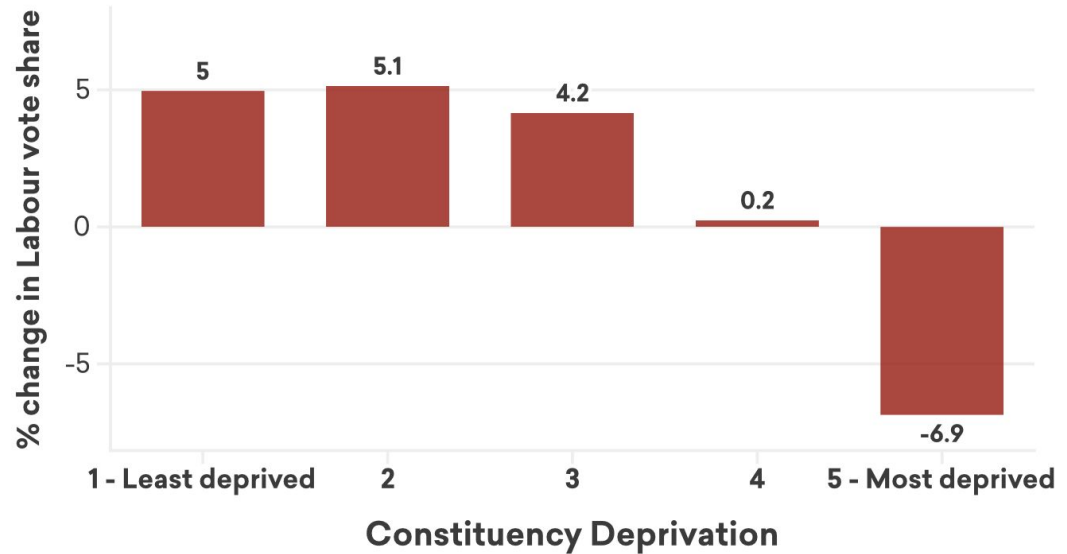
Swing to Labour higher in more affluent areas than more deprived areas

Those who live in areas which are struggling the most were less likely to back the Labour Party at the election with a significant swing against the Labour Party from 2019.

This places a premium on Labour delivering for more deprived communities as it sets out its agenda for governing.

Swing to Labour by Level of Deprivation

2019 to 2024 GE

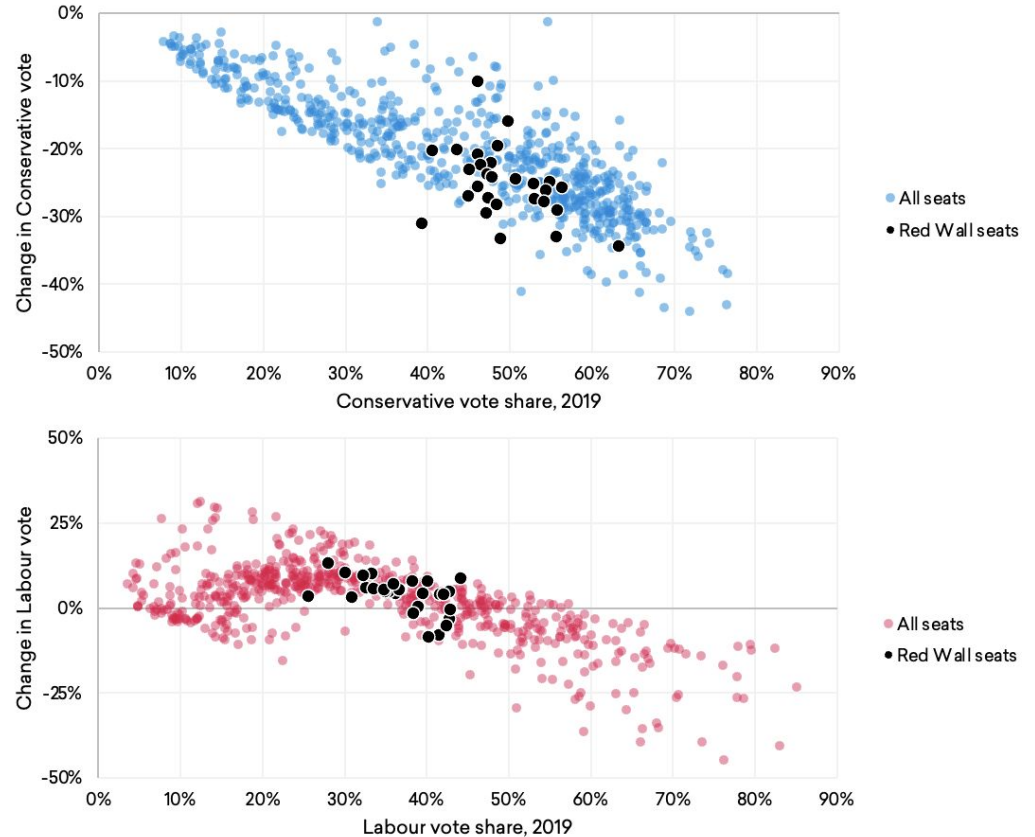


Red Wall recovery for Labour, but not to pre-2019 levels

Conservative vote share halved in the Red Wall, as it did across the country. And Labour regained all but one of the Red Wall seats they lost.

Labour is less popular in these seats now than in 2019, losing a total of 17,000 votes across the 28 Conservative-held Red Wall seats.

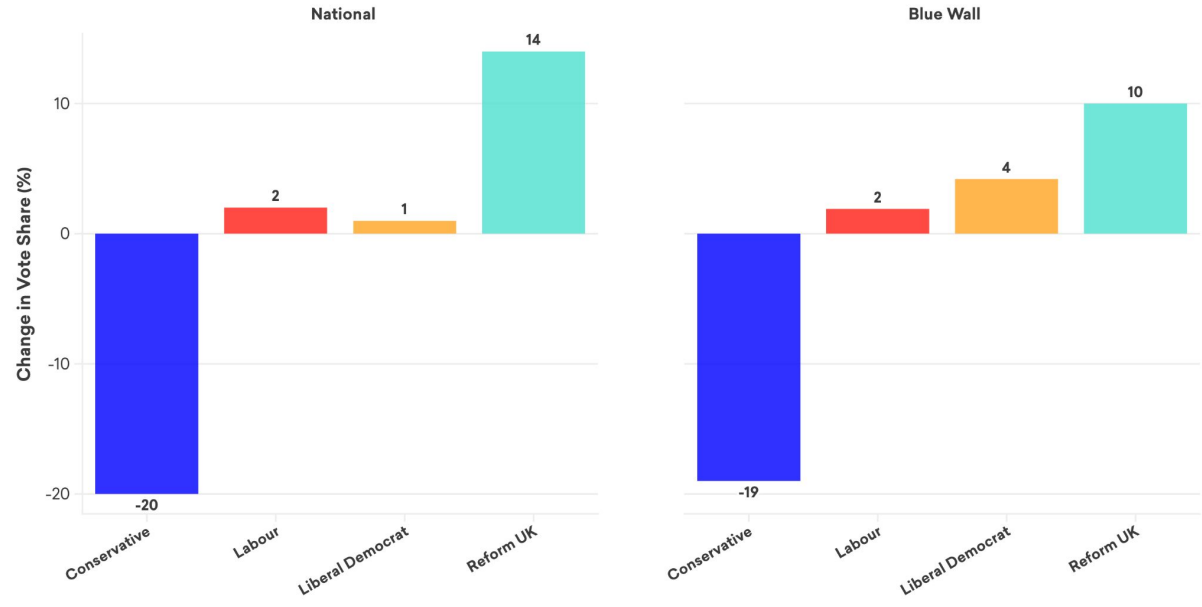
This suggests that the realignment is here to stay. Labour's advantage in these seats is far lower than it was.



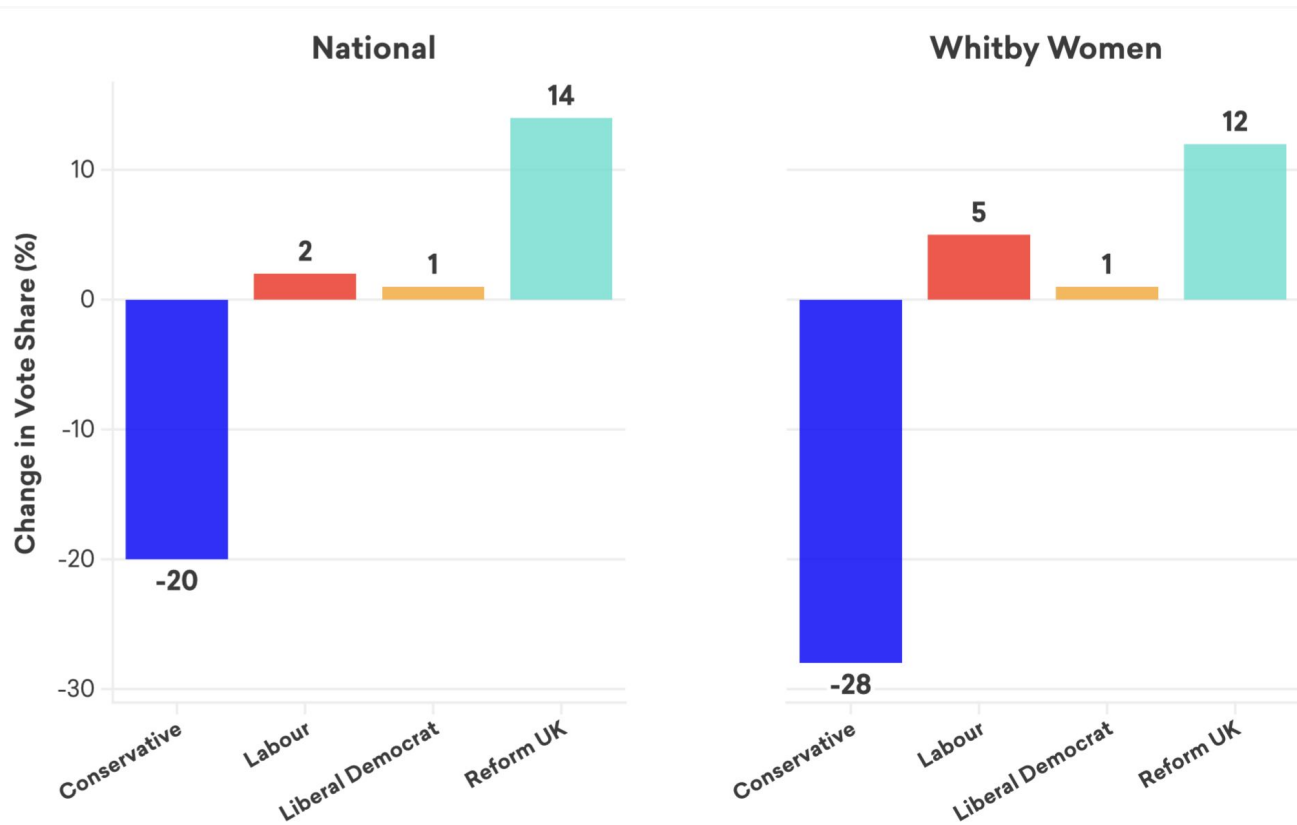
Conservative collapse in their Blue Wall heartlands

Of 37 representative Blue Wall seats which the Conservatives won in 2019, the Conservatives held only 9. The Liberal Democrats gained 19 and Labour took 9.

Conservative vote share fell by 19 points in the Blue Wall. The Liberal Democrats outperformed in these areas with a swing of +4, while Reform UK underperformed.



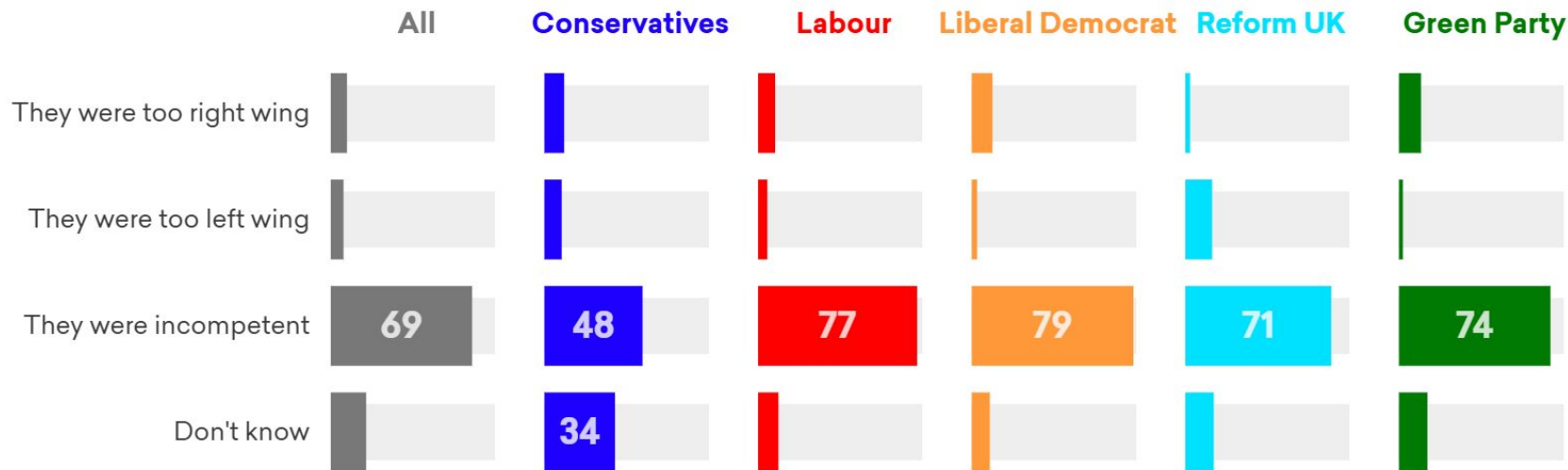
Whitby Women



**Where do the
Conservatives build back
from?**

Competence rather than ideology explains Conservative loss

From the following list, which do you think best explains why you think the Conservatives lost this election?



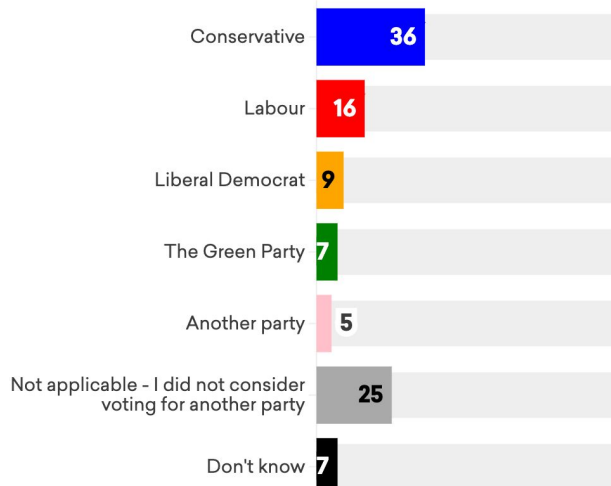
Lego-block voter coalition building misunderstands voters

Barely a third of those who voted for Reform UK on Thursday say they might have voted Conservative.

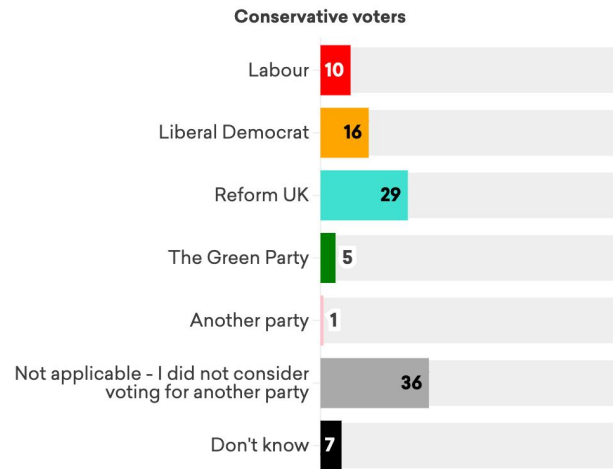
Adding up the Conservative and Reform UK votes is misguided - in part because Reform UK are attracted to other parties, but also because a pact with Reform might lose the Conservatives votes to other parties.

Only three in ten Conservative voters said they might have voted for Reform with more prepared to go to parties of the left.

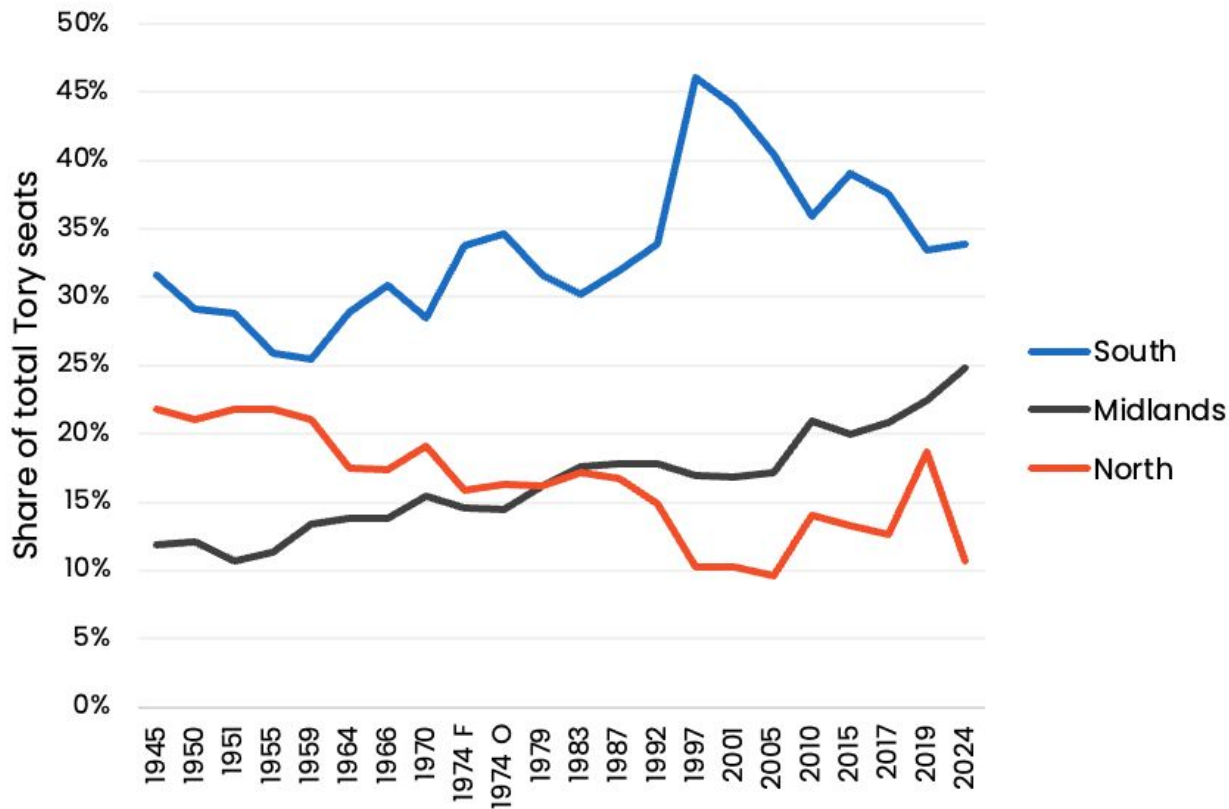
You said you voted for Reform UK yesterday. Are there any other parties that you might have voted for, if you hadn't voted for that one? Select any that apply



You said you voted Conservative yesterday. Are there any other parties that you might have voted for, if you hadn't voted for that one? Select any that apply



Conservative heartland moves to the Midlands



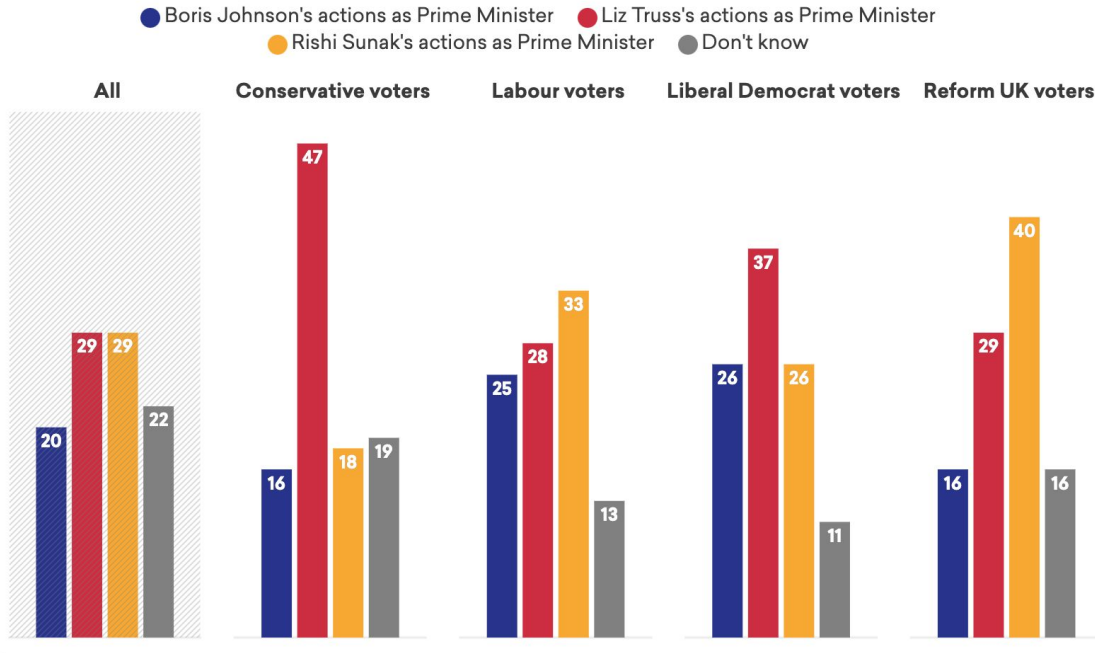
The Midlands now make up a larger share of Conservative seats than ever before.

The Conservatives' 30 Midlands seats account for 25% of all Tory MPs.

Despite the ebb and flow of the Tory party since WW2, the Midlands keeps steadily increasing its seat share within the coalition.

The blame game

If the Conservatives lose the election, do you think that was more due to...



The public are torn on which Conservative Prime Minister is responsible for the party's woes.

Loyal Conservative voters overwhelmingly blame the actions of Liz Truss, with almost a majority saying she is responsible.

Current Reform UK voters are more likely to blame Rishi Sunak than any other Prime Minister.

And current Labour voters are more likely to blame Boris Johnson than any other voter group does..

Tees Valley and Scotland - starting points for Conservative recovery

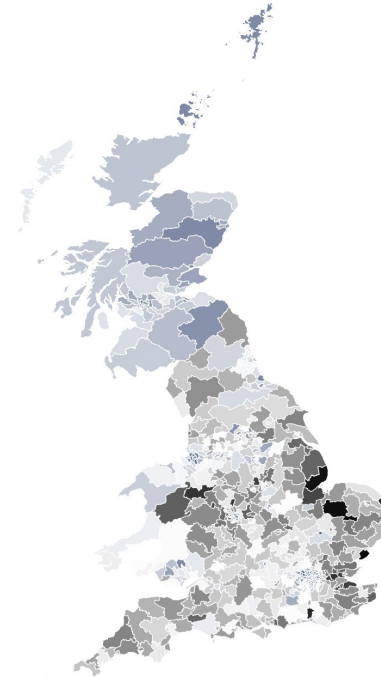

Looking at where the Conservatives overperformed locally compared to their national swing, two places stand out on the map - Scotland and Tees Valley.

Holding their seats in Scotland is a key difference between the Conservatives defeat in 1997 when they were wiped out and 2024 where they have retained their seats in Scotland and suffered smaller swings against them in Scotland (-12 vs -20).

A similar pattern emerges in Tees Valley where the swing against the Conservatives was much less (-13 vs -20 points) and where the Stockton North seat was held.

Where did the Conservatives outperform locally?

Outperformance relative to national swing of -20 points



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