



POLITICAL RESEARCH ACROSS THE UK

A winter of discontent?

With Brexit negotiations between the UK and EU having been kicked into the long grass, we await the outcome of what is sure to be a bitter and hard-fought election, where Brexit fights with domestic issues to capture the support of voters. Although early in the campaign phase, our polling from before the election was agreed, helps to contextualise somewhat predictable tactics being adopted by the leading political parties and politicians.

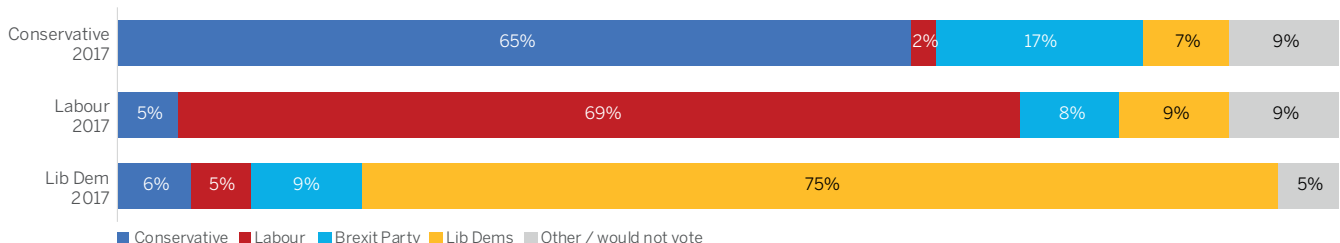
At the time of our research, we had the Conservatives and Labour neck and neck, both on 30% of those who said they would vote, but under the bonnet of British politics, a lot of factors are in play. Our research uses behavioural economics techniques to understand the rational, irrational and emotionally charged 'New Model Voters' in British politics.

The Voters are Churning

Both the Conservatives and Labour are expected to lose over 30% of those who voted for them in 2017. For the

Conservatives, 17% are claiming they'll now vote for the Brexit Party, highlighting the importance for Boris to be seen as a

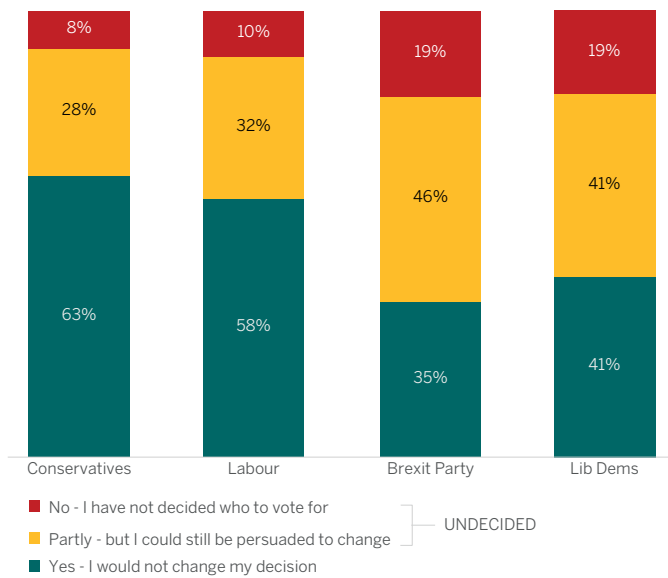
Q1. Which political party would you vote for in the upcoming General Election?



strong Brexiteer to help stop this churn. For Labour, 17% of their previous voters are split between the Brexit Party and Lib Dems. These are national trends and key will be whether this voter behaviour is clustered to particular electorates. In 2015, a relatively high vote share didn't translate into seats for UKIP. The challenge for Lib Dems is also to seek out the marginal seats and high potential churn areas, where they can pick up the MPs and influence once captured under Clegg.

When examining the conviction of support, the Brexit Party and Lib Dems also have a significant challenge during the campaigning period to lock in their potential support. Our research shows approximately 6 in 10 of their claimed supporters admit they could still change their minds on who to support, while this flips over for Conservative and Labour supporters, where 6 in 10 claim they will not change their decision.

Q2. Have you made up your mind on who to vote for in this UK general election?



Labour will lose 7% to the Brexit Party, 9% to the Lib Dems and 5% to the Conservatives, suggesting that their non-committal Brexit position is in line with their electorates' Brexit positions – but equally, that they are losing voters on both sides of the Brexit divide.

Labour will need strong turnout to win outright

Q3. How likely and discouraging would the following [scenarios] be on your likelihood to vote in an upcoming UK General Election?

	Conservatives (% distracted)	UK (% distracted)	Labour (% distracted)
Poor weather / rain	18%	24%	26%
Waiting time to vote	18%	25%	27%
Over-indulgence / hangover from the day before	19%	23%	27%
Social commitments	21%	27%	24%
Sporting event watching / participating in	20%	22%	27%

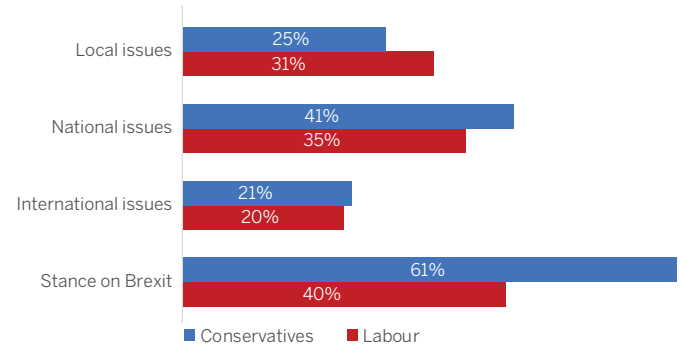
Labour's close polling numbers to the Conservatives merit a closer look. Labour voters are far more likely to be distracted from voting by everyday events, ranging from a busy day at work to a hangover. As a result, Labour will need to hope for strong voter turnout to really challenge the Conservatives.

Across all the potential events polled, 26% of Labour voters could be distracted from voting, compared with 19% for the Conservatives and 25% for the electorate as a whole.

Moreover, Labour voters are more likely to be dissuaded from voting by poor weather or rain. With an election in the depths of winter, this will likely play into the Conservatives' hands.

Brexit or Bust?

Q4. Assuming that you're going to vote, which of the following would significantly influence your decision on who to vote for?



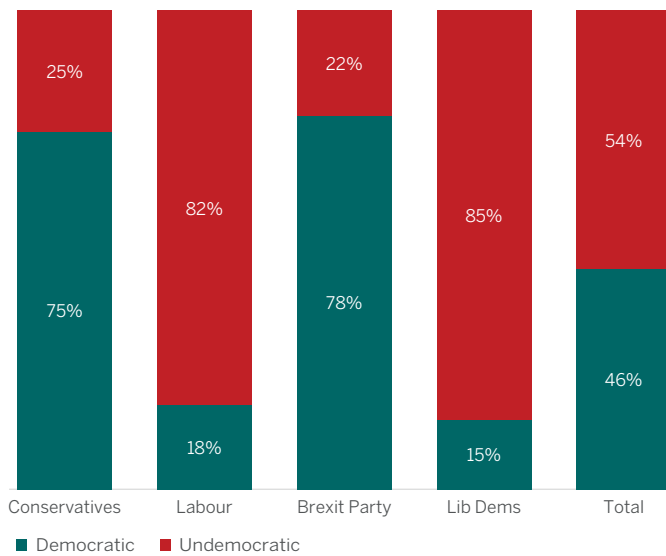
Although important, our research shows that Labour voters are significantly less influenced (-21%) by the party's stance on Brexit than those supporting the Conservatives. In contrast, intended Conservative voters are overwhelmingly influenced by their stance on Brexit and their leader.

Early messaging by Labour reflects this, with the weaponizing of many national and local issues early on in their campaign, in an attempt to shift the focus away from Brexit and back to their traditional strengths. They have vowed to outspend the Conservatives on the NHS and also accused them of jeopardising it on the back of a potential post-Brexit trade deal with the US. Recently, Labour have also promised to give every home and business in the UK free full-fibre broadband by 2030. Our research back in 2017 showed that Labour significantly benefited from the message that tuition fees would be scrapped, so it's not surprising that this pledge is being circulated again.

How Labour finances these promises is up for debate, but at a minimum they stand to perform better than initial polling forecast. They will only need to confront the implications of these pledges if they actually win the election.

Prorogation popularity depends on your position on Brexit

Q5. Which of the following statements [on prorogation] best reflects your opinion on developments in the UK Parliament?



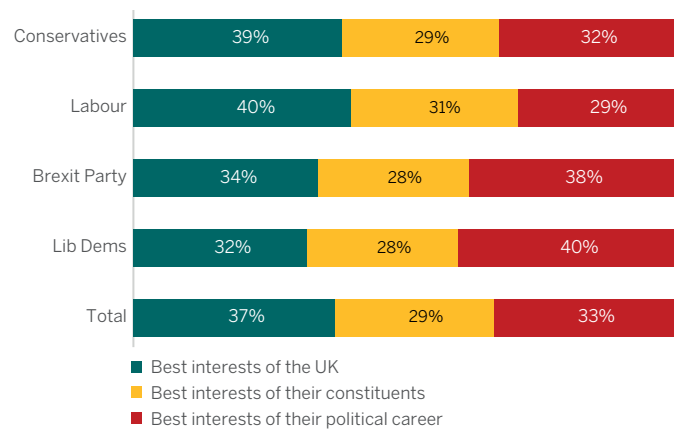
A significantly larger proportion of Conservative and Brexit Party supporters were in favour of Boris Johnson's plan to prorogue Parliament than the wider electorate, indicating his

approach played well among his base and Brexit-supporting voters. Should he attempt this strategy again if he stays in government, it will prove highly divisive once again.

- 54% of the wider electorate believe Johnson behaved undemocratically in his prorogation of Parliament.
- Among Conservative supporters, however, this proportion drops to 23%, with 77% in favour of prorogation.
- This is mirrored among Brexit Party supporters, with 81% in favour of prorogation and just 19% against.

Trust in politicians – are Conservatives self-serving?

Q6. How do you think your MP balances the following?



When asked how their local MP balances the best interests of the UK, their constituents, or their own political careers, respondents are split across the board.

Lib Dem constituents feel most strongly - 40%, ahead of a mean of 37% - that their MPs represent themselves, perhaps reflecting a sense of anger at 2016 Remain-supporting MPs refusing to back second referendums and anti-Brexit policies.

Conservative constituents also feel their MPs prioritise their political careers, with 39% believing self-interest to be their priority ahead of a mean of 37%.

Labour constituents split the difference, but still believe their MPs to be serving the best interests of the wider UK at 40%.

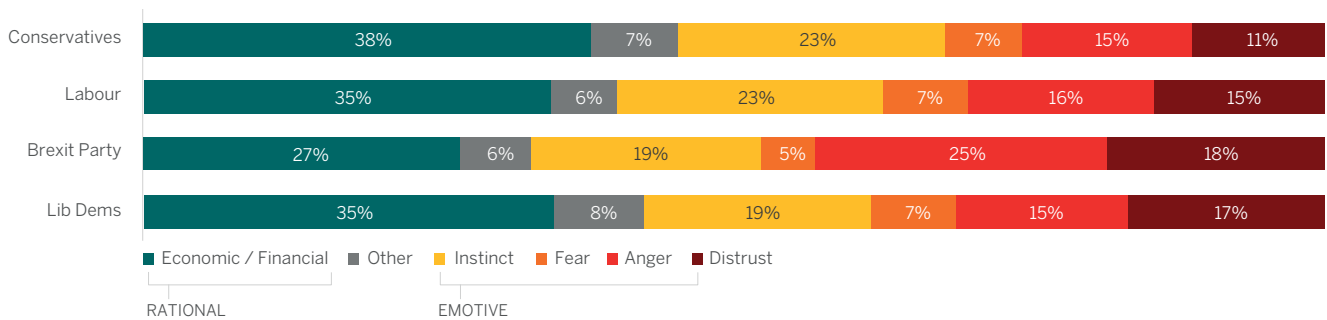
Fear and loathing in Westminster

Q7. How would you divide the reasons for your voting behaviour in the next UK General Election?

Brexit Party supporters are, perhaps unsurprisingly, the angriest of those polled, and Conservative supporters the least. More broadly, emotive rather than financial reasons are the primary driver for support across all parties.

Over a quarter (27%) of Brexit Party supporters cite anger as a reason for their voting behaviour in the next General Election, compared to a mean of 14% across all parties.

Emotive issues – comprising anger, fear, distrust, and instinct – account for more of voters' behaviour than economic issues across the electorate: 54% for the Tories, 60% for Labour and the Lib Dems, and 68% for the Brexit Party.



Conclusion

As things stand, circumstances favour the Conservatives, despite initial forecasts. Labour voters are more likely to be distracted and deterred from turning out to brave the December weather, while the protest blocs of Brexit Party and Lib Dem supporters are less sure of their voting intentions than those who support the Conservatives and Labour. Moreover, while Labour's Janus-esque position on Brexit reflects the

breadth of Brexit views held by their core electorate, it equally means they are set to leak voters to parties with stronger positions on both sides of the Brexit divide. Whatever happens, the febrile atmosphere in UK politics looks set to continue, with voters suspicious of politicians' motives and angry at the political process. We expect this dynamic to play out through a bitterly-fought, tightly contested election.

RESEARCH METHODOLOGY

FTI Consulting's Strategy & Research team conducted this research online with n=2,200 adults representative of the UK general population from 9th – 16th September 2019. Results were weighted by age, gender, location, UK GE 2017 & EU Referendum 2016 vote.

Please note that the standard convention for rounding has been applied and consequently some totals do not add up to 100%

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