

To: Shelter

Re: Analysis of MRP results

- > **One in three 2019 Conservative voters who are private renters would abandon the party if an election were held today**
 - Only 67% of Conservative voters who rent privately would stick with the party if an election were held today. This number improves amongst homeowners (72%) and more so amongst those who own their home outright (75%).
 - In a national context, where the Conservative party looks set to lose voters, it is clear that private renters are moving away from the party at an accelerated rate when compared to other tenure types.

- > **Of those private renters leaving the Tory party, 46% intend to vote Labour, 20% each for the Liberal Democrats and Reform UK and a further 10% for the Greens**
 - Our analysis shows that whilst private renters are moving away from the Tories, they are not swinging directly behind Labour, instead spreading their vote across a number of parties. Whilst our poll showed that almost three-quarters of private renters believe the Conservative party have the wrong policies on housing, our MRP analysis suggests they haven't decided which party *does* have the right policies on housing.

- > **Private renters are the most likely to base their future vote intention on housing policy, with 65% agreeing that housing policy will be a factor. The same metric for homeowners is 40%**

- > **There are 38 seats uncovered by our MRP analysis - mostly in London and the South - in which private renters are the key constituency. These seats will likely determine whether the Conservative party wins a majority at the next election**
 - To be included in this seat count, it had to have the following properties:
 - A greater density of private renters than the national average (15%)
 - A greater drop in the 2019 private renting Tory vote than generally in the seat (i.e. private renters were moving away from the party at a quicker rate than the seat was in general)
 - The constituents linked their future vote intent to housing policy at a level which was higher than the national average
 - Using this framework we arrived at the 38 seats in which private renters will be key in the next General election:

I. Marginal seats (in our MRP) which flipped to Labour

Labour pick-ups, private renters crucial: seat now marginal
Harrow East
Milton Keynes North
Hastings and Rye
Milton Keynes South
Gloucester
Reading West
Wycombe
Worcester
Camborne and Redruth
Pendle
Crawley
Filton and Bradley Stoke
Vale of Clwyd

II. Flipped to Labour in our MRP and by a big enough margin to be considered safe Labour

Labour pick-ups, private renters crucial: seat now safe Labour
Blackpool South
Southampton, Itchen
Stoke-on-Trent Central
Wolverhampton South West

III. Marginal seats (in our MRP) which Labour did not flip

Non-Labour pick-ups, private renters crucial: seat now marginal
Richmond Park
South Thanet
Ceredigion
Telford
Dover
Worthing West
Arfon

- IV. *Marginal seats (in our MRP) which flipped to Labour, where private renters are numerous but dropping from the Tory party at the same rate as other tenure types*

Labour pick-ups, private renters dropping at same rate as other tenure categories - marginal
Cities of London and Westminster
Kensington
Wimbledon
Hendon
Chipping Barnet
Lincoln
Uxbridge and South Ruislip
Truro and Falmouth
South Swindon

- V. *Marginal seats (in our MRP) which did not flip Lab, where private renters are numerous but dropping from the Tory party at the same rate as other tenure types*

Non-Labour pick-ups, private renters dropping at same rate as other tenure categories - marginal
Chelsea and Fulham
Finchley and Golders Green
Kingston and Surbiton
Twickenham
Croydon South

> **Of these 38 seats, only 5 are in the so-called “Red Wall” which are seats considered by many to be the easiest pick-ups for Labour**

- These seats are concentrated in the South and London and present a challenge to the Conservatives - if they lose the Red Wall (as is expected) and continue to struggle in these seats (by lack of appeal to private renters - a critical voting block in these seats) then a majority at the next election seems unlikely.

