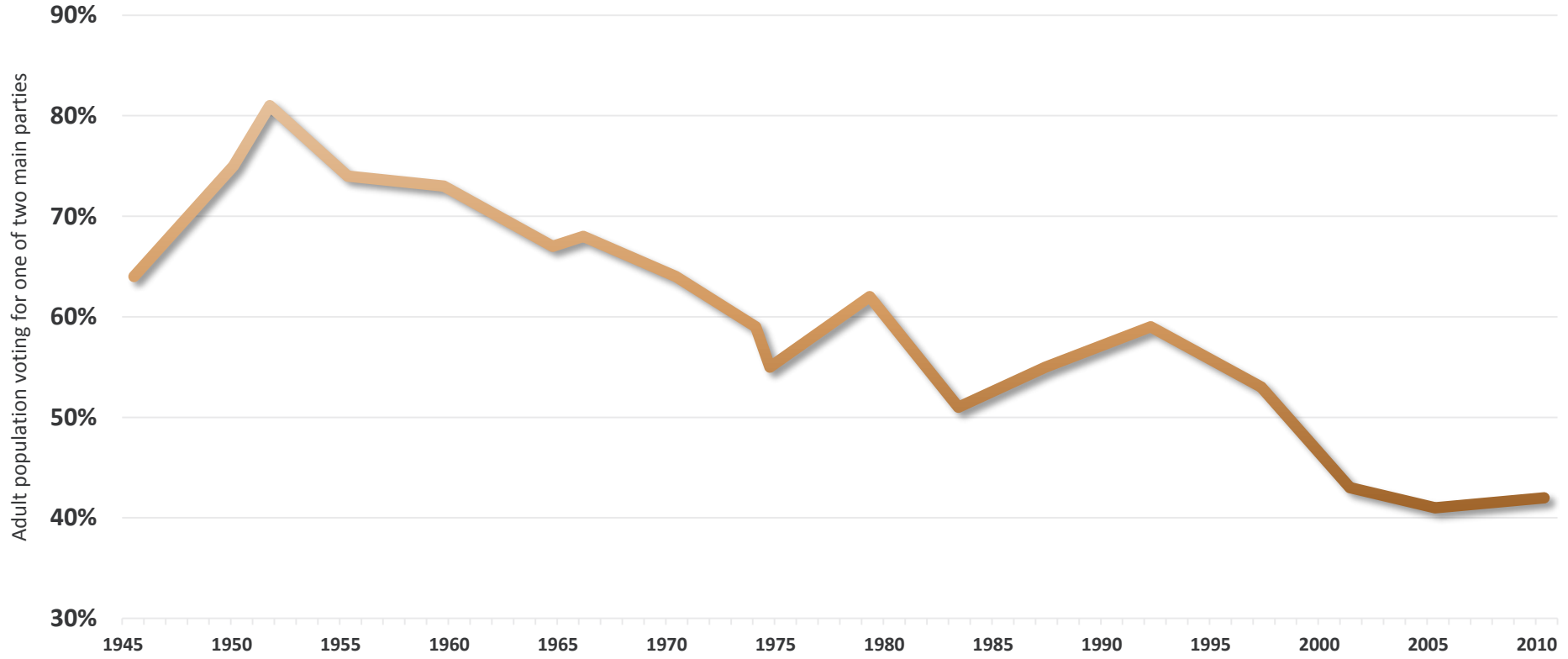




# Where are we?



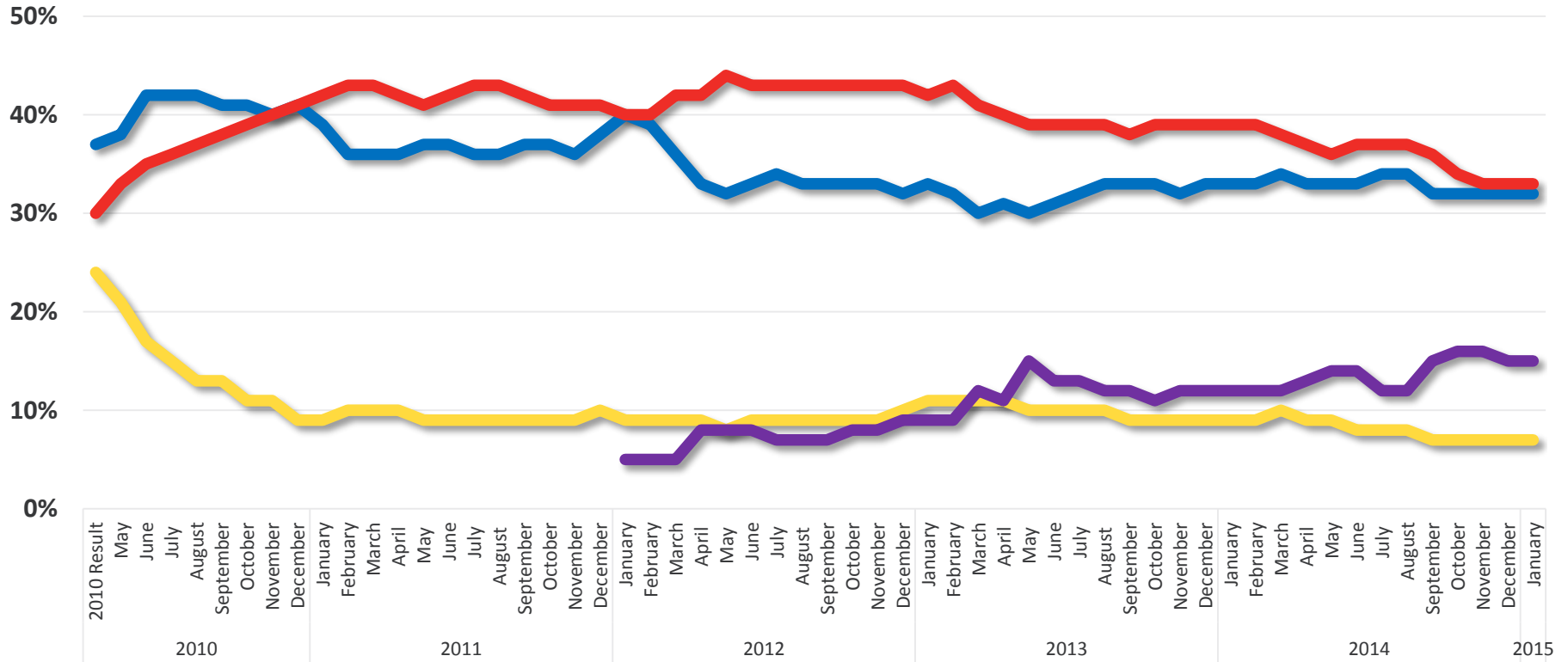
# The Decline of the Two Party System



# The General Election of 2010

Conservative	37%	306
Labour	30%	258
Lib Dems	24%	57
Ukip	3%	0
Other	6%	29

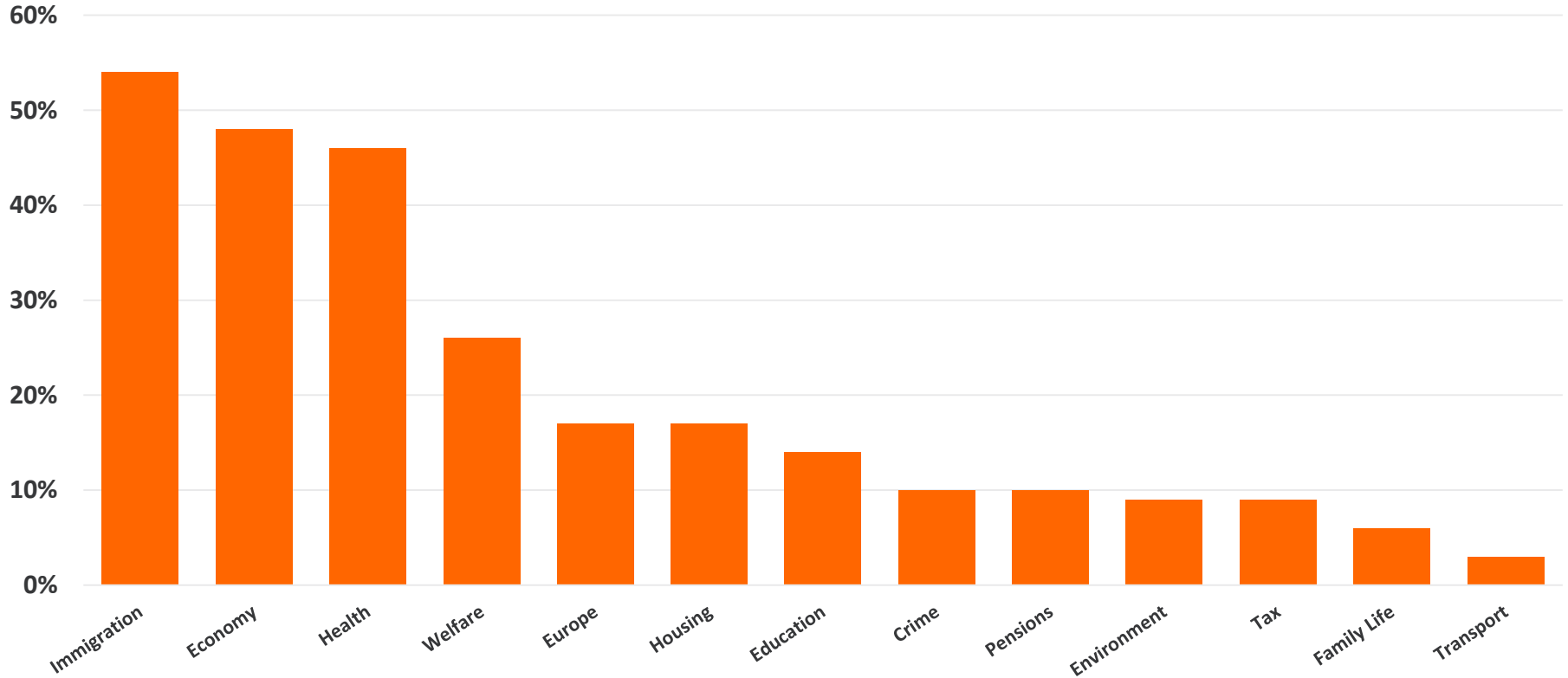
# Voting Intention



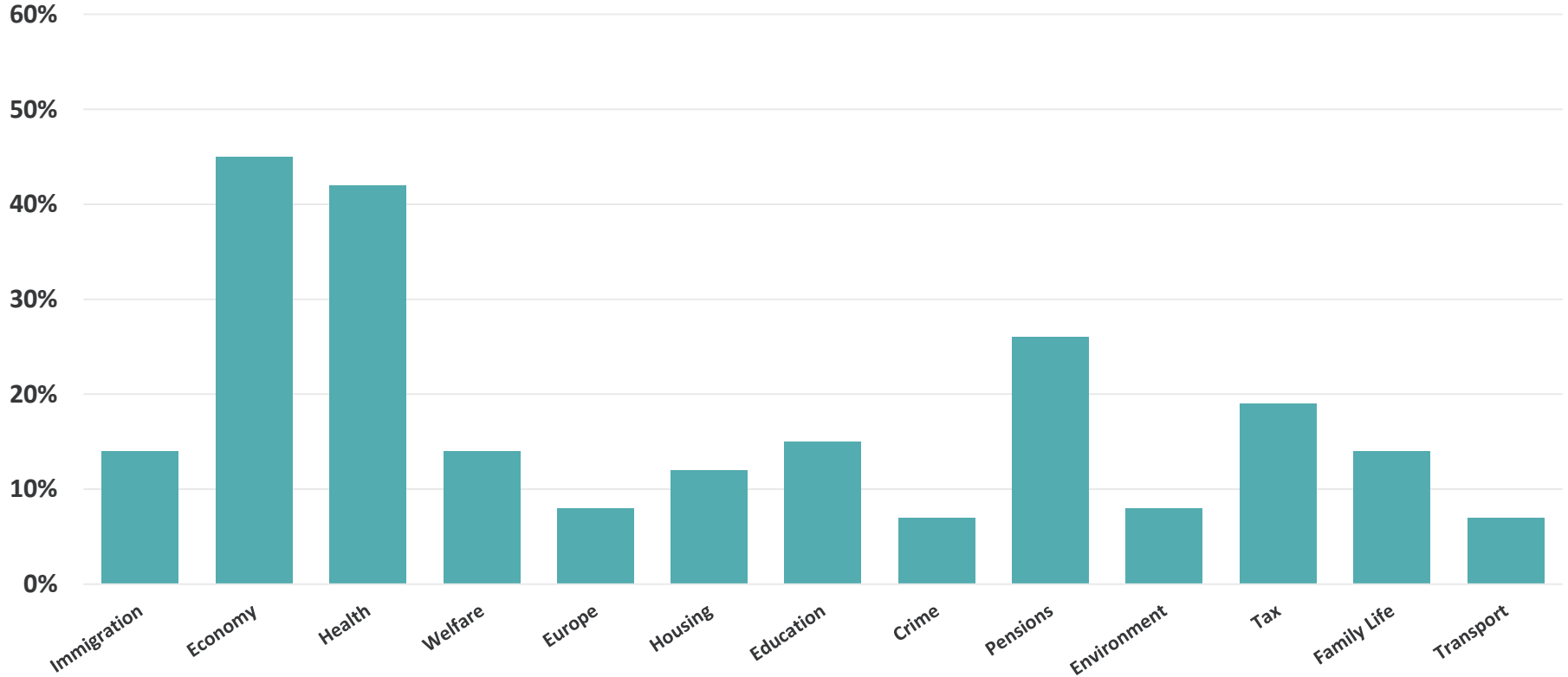
# Current Voting Intention

Conservative	34%
Labour	34%
Lib Dems	8%
Ukip	12%
Green	6%

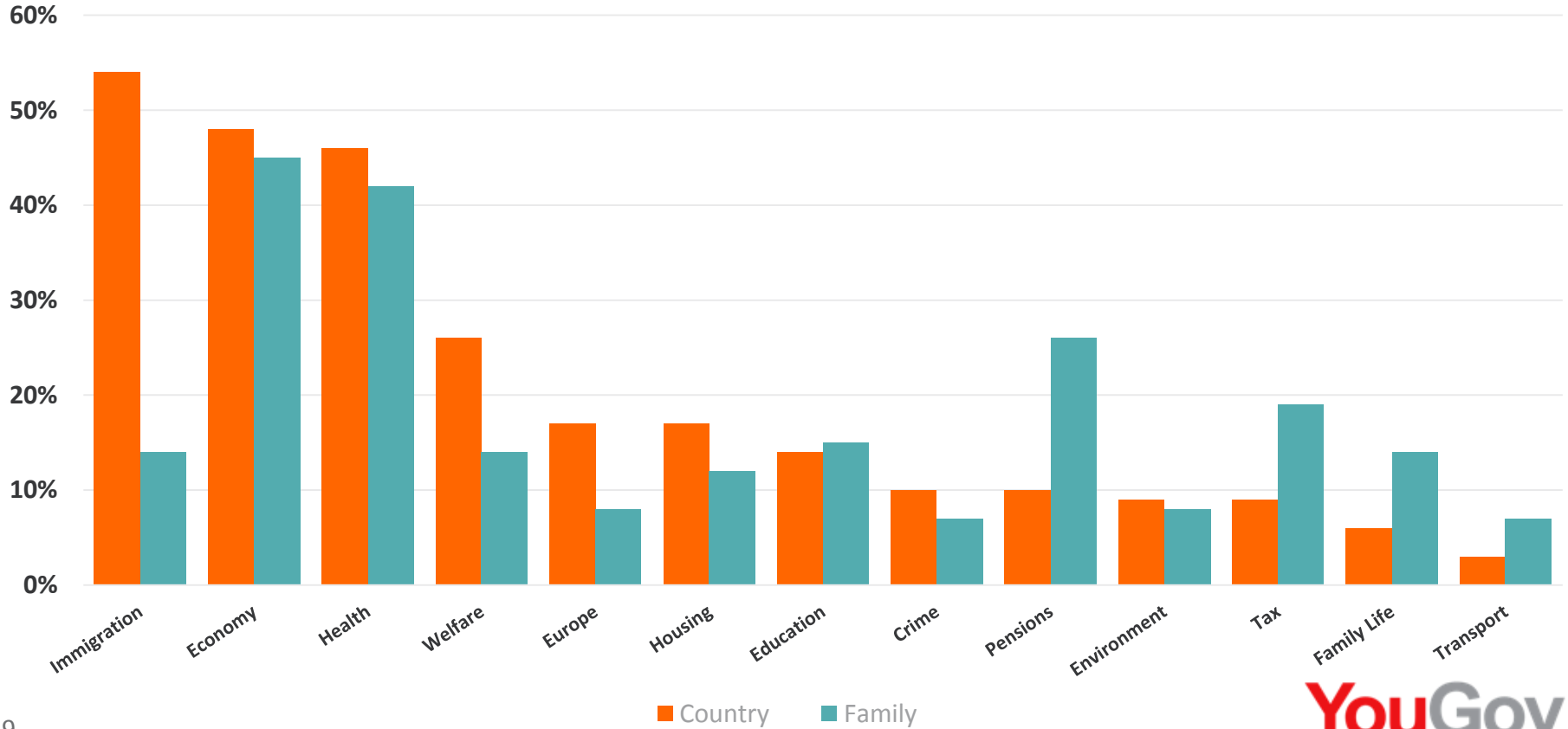
# Most Important Issues



# Most Important Issues



# Most Important Issues



# Where are we going?

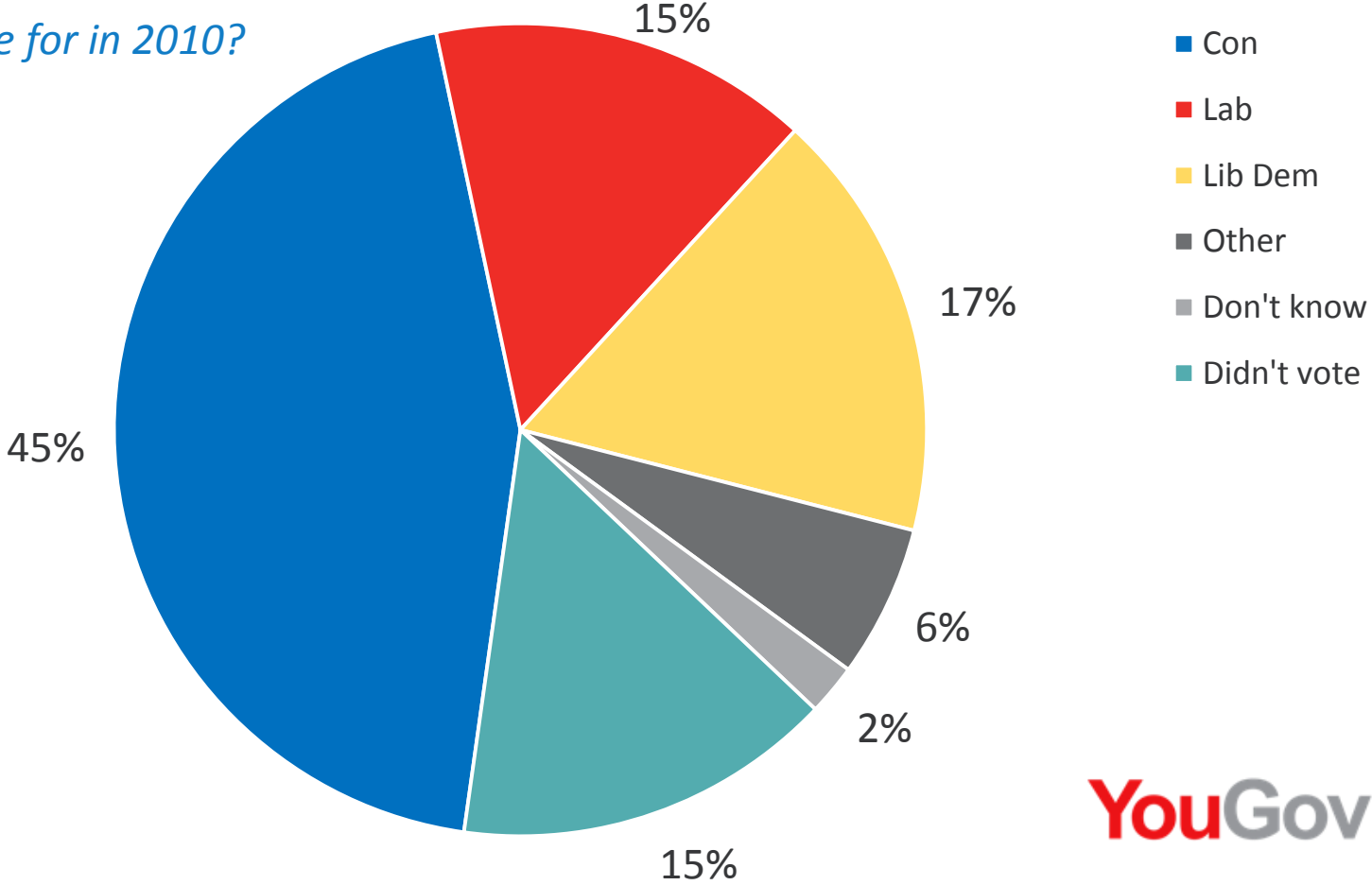


# The Big Questions

- What will happen to UKIP?

# UKIP Converts

*Who did they vote for in 2010?*

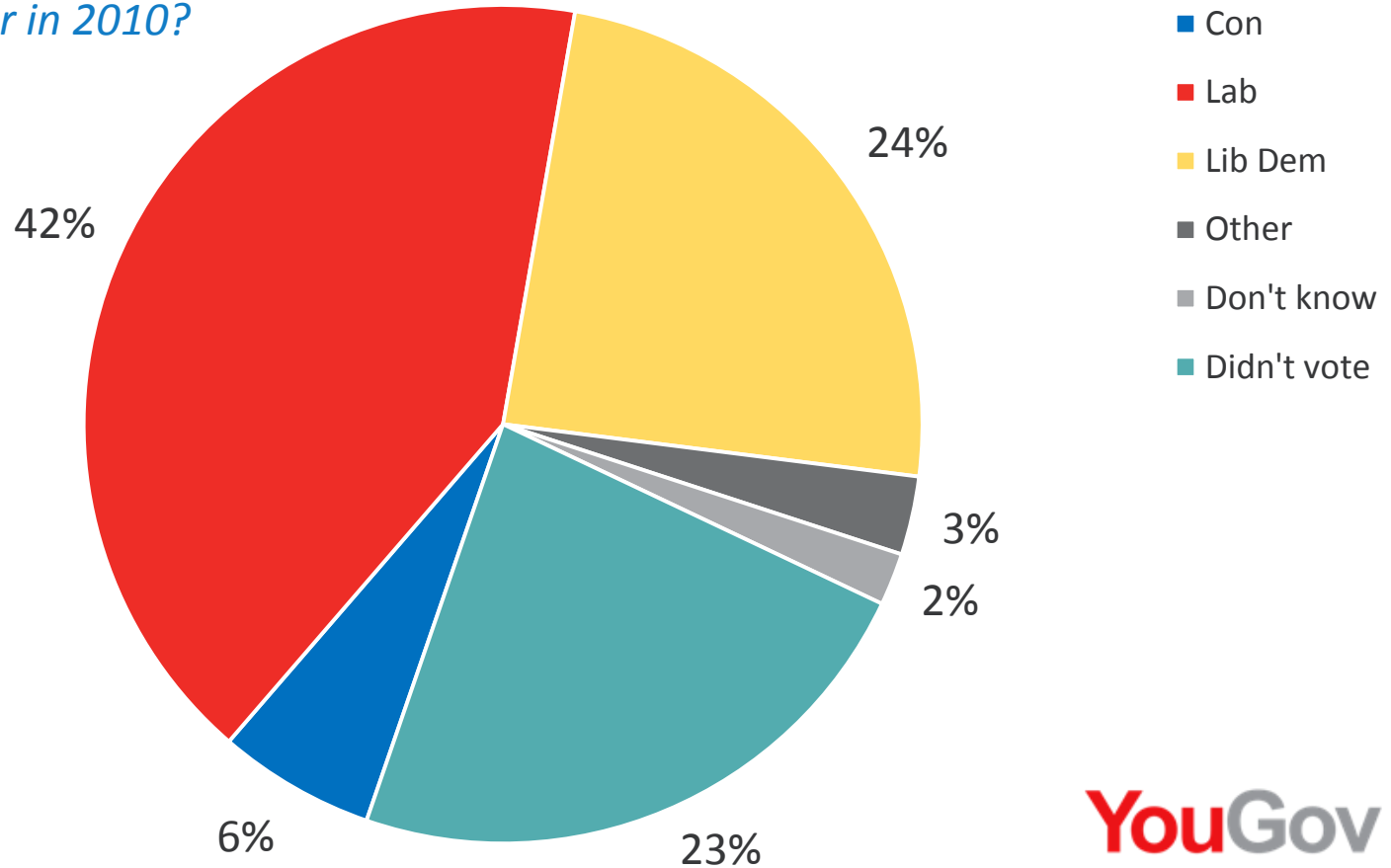


# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?

# SNP Converts

*Who did they vote for in 2010?*

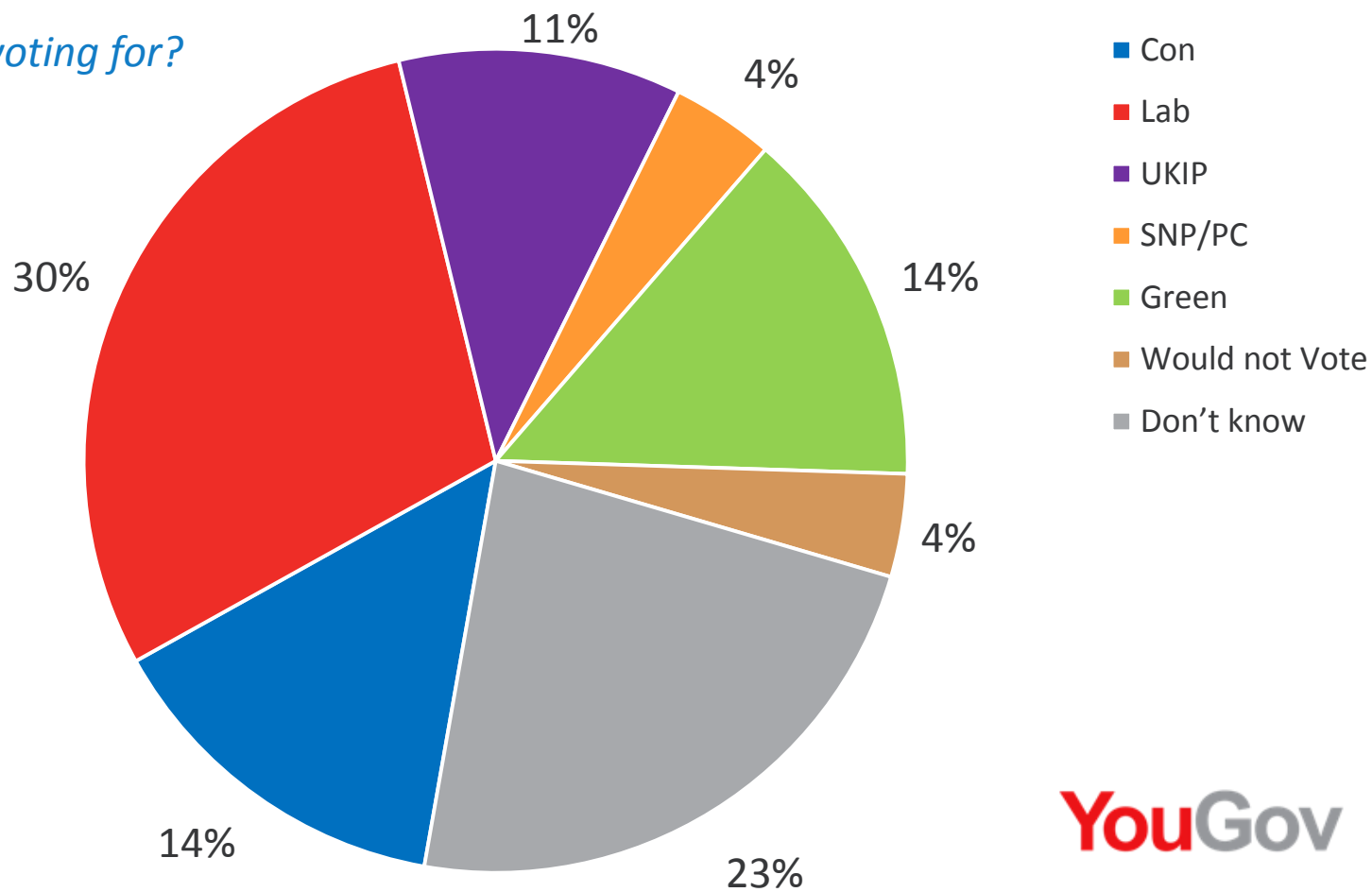


# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?
- What will happen to the Lib Dems?

# Lib Dem Defectors

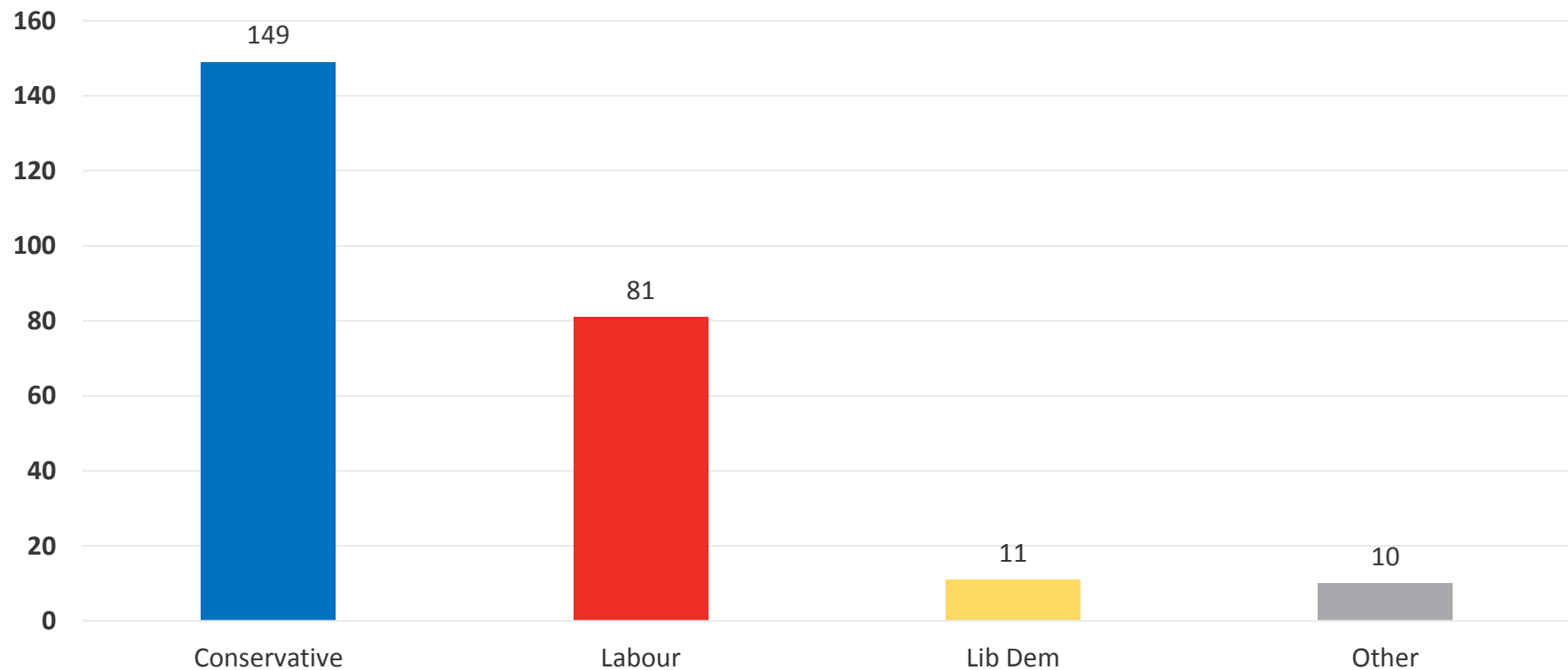
*Who are they now voting for?*



# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?
- What will happen to the Lib Dems?
- What about MP incumbency more generally?

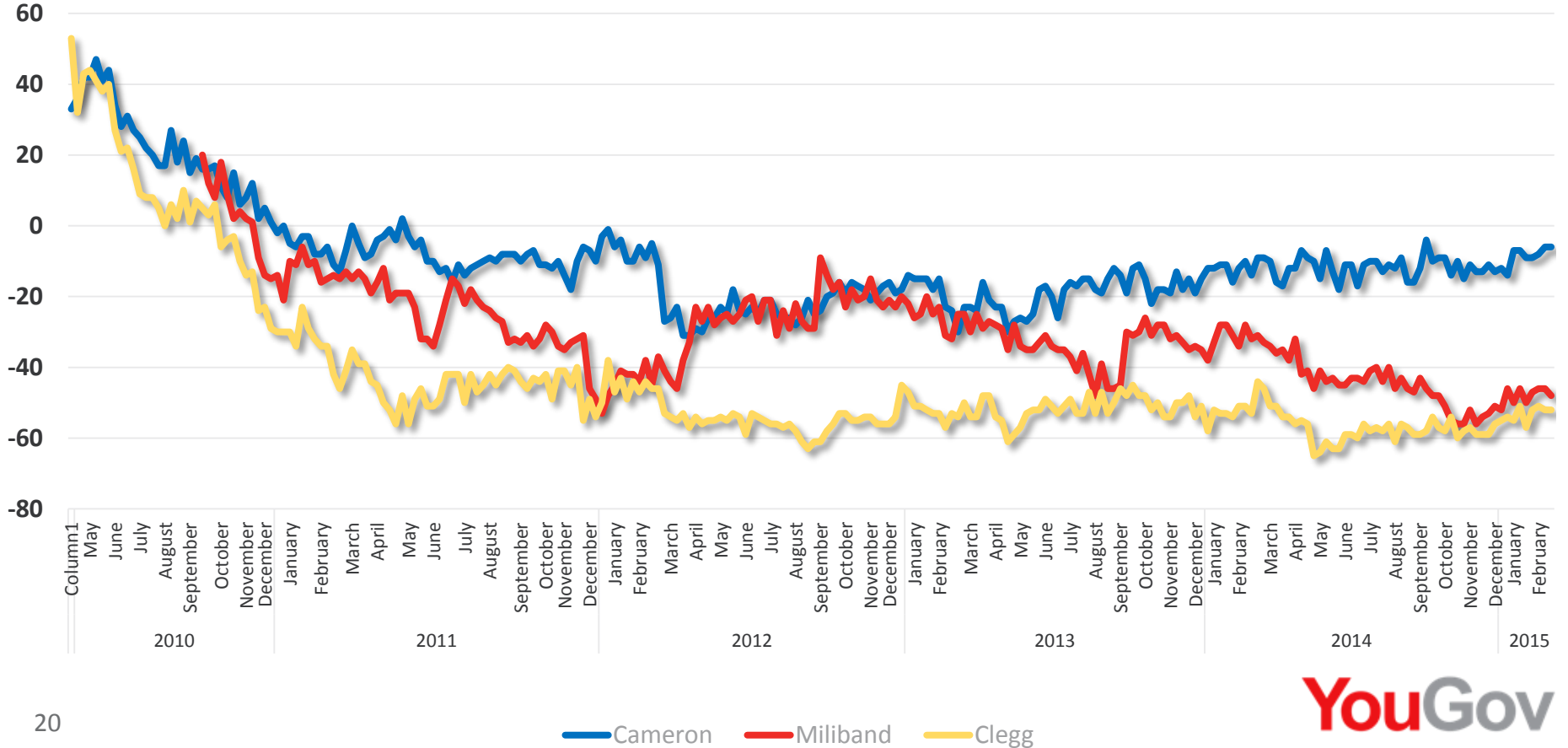
# Incumbent MPs



# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?
- What will happen to the Lib Dems?
- What about MP incumbency more generally?
- What effect will the leaders have on the campaign?

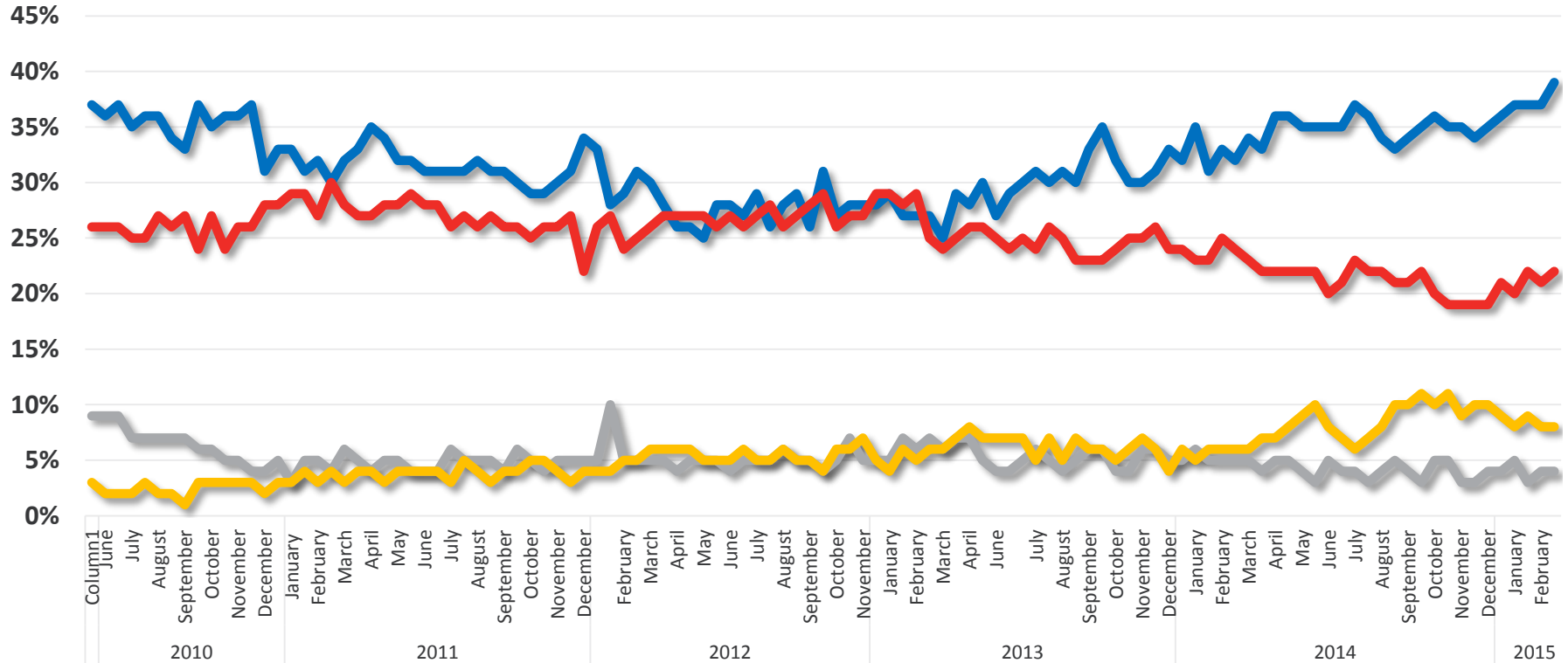
# Leaders Approval



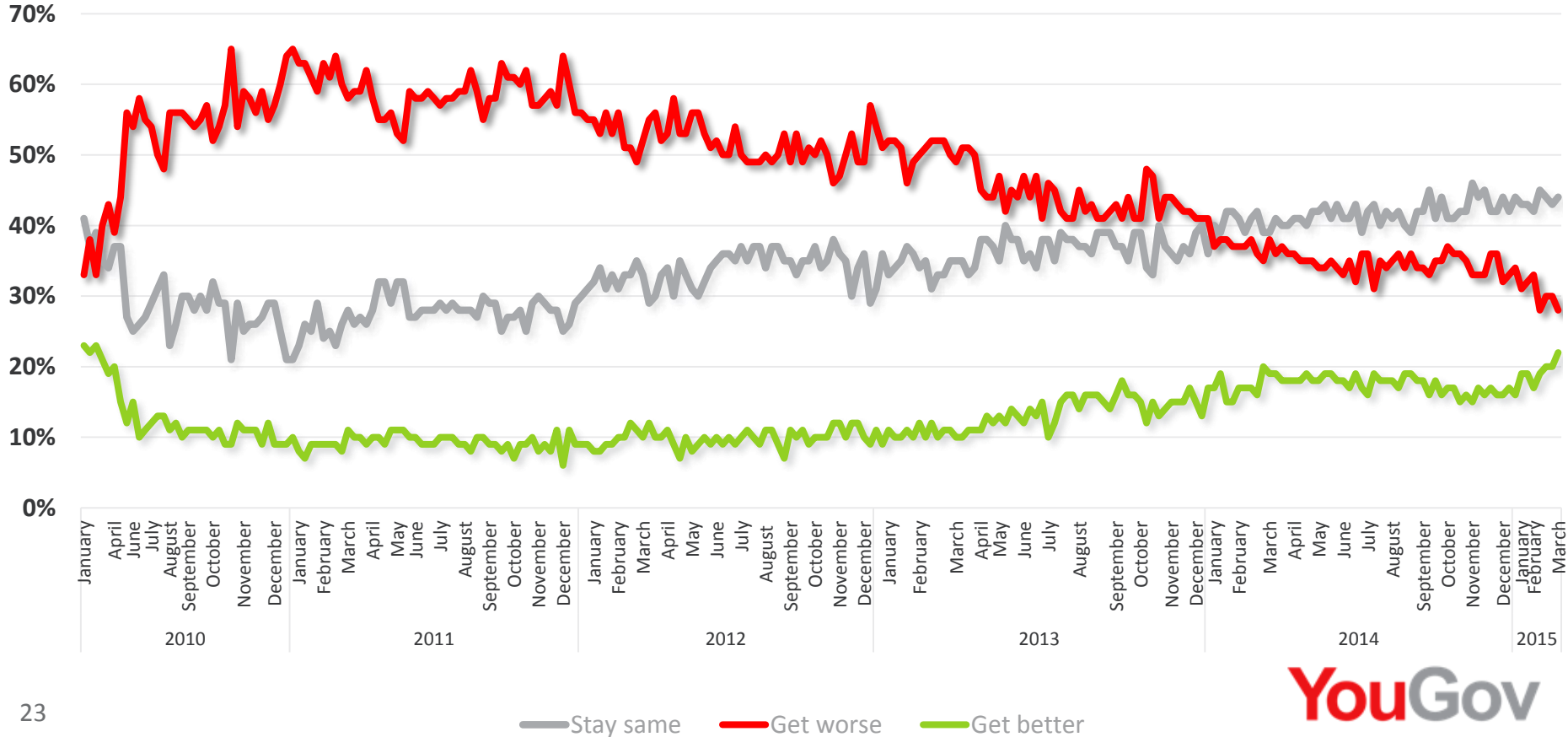
# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?
- What will happen to the Lib Dems?
- What about MP incumbency more generally?
- What effect will the leaders have on the campaign?
- What will happen to the economy?

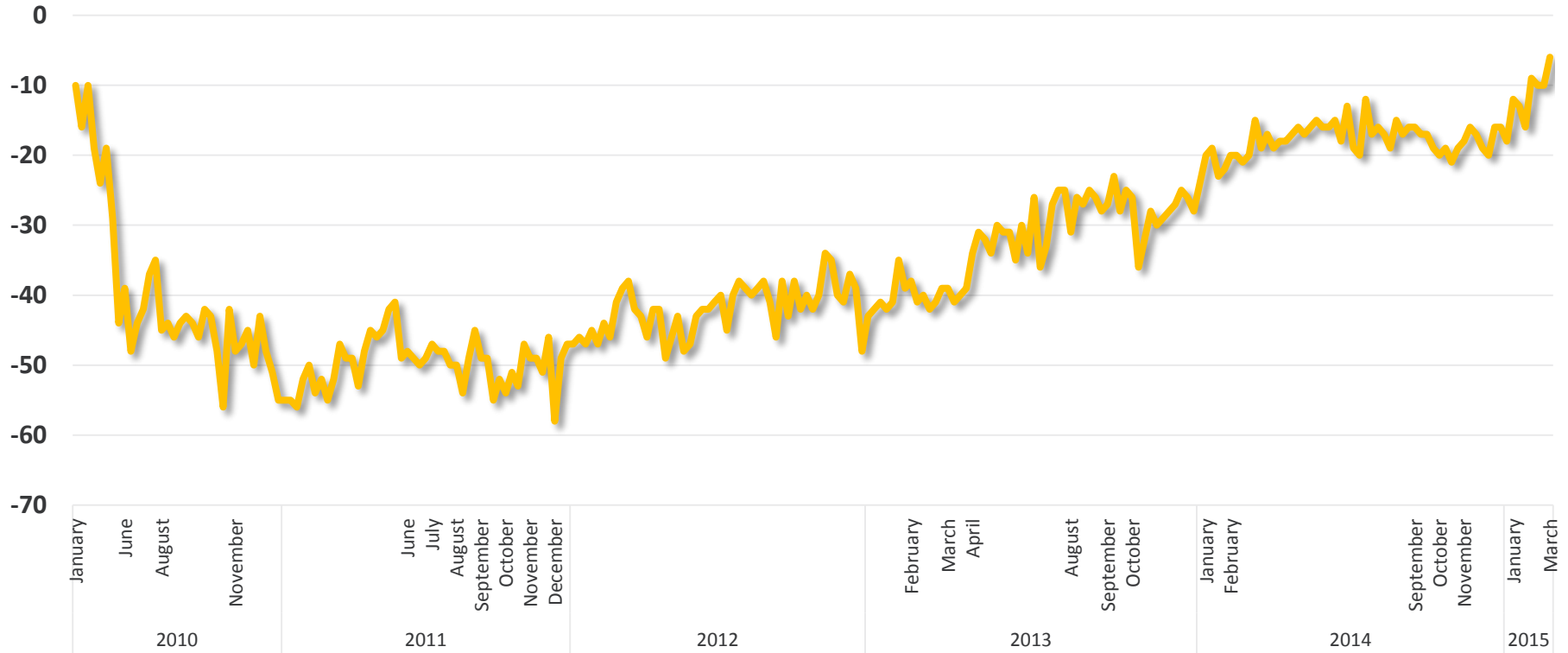
# Best party on the economy



# Household financial situation in the next 12 months



# Feel Good Factor



# The Big Questions

- What will happen to UKIP?
- What will happen to the SNP?
- What will happen to the Lib Dems?
- What about MP incumbency more generally?
- What effect will the leaders have on the campaign?
- What will happen to the economy?

# The Biggest Question

Who is going to win?

# A Possible Scenario (Not a Prediction)

Conservative	290
Labour	270
Lib Dem	25
UKIP	5
SNP	35
Plaid	3
Green	1
DUP	8
Other	13

# A Possible Scenario (Not a Prediction)

Conservative 290

**Total 290**

**Needed 326**

# A Possible Scenario (Not a Prediction)

Conservative	290
Lib Dem	25
<b>Total</b>	<b>315</b>
<b>Needed</b>	<b>326</b>

# A Possible Scenario (Not a Prediction)

Conservative	290
Lib Dem	25
UKIP	5
<b>Total</b>	<b>320</b>
<b>Needed</b>	<b>326</b>

# A Possible Scenario (Not a Prediction)

Conservative	290
Lib Dem	25
UKIP	5
DUP	8
<b>Total</b>	<b>328</b>
<b>Needed</b>	<b>326</b>

# A Possible Scenario (Not a Prediction)

Labour 270

**Total 270**

**Needed 326**

# A Possible Scenario (Not a Prediction)

Labour	270
Lib Dem	25
<b>Total</b>	<b>295</b>
<b>Needed</b>	<b>326</b>

# A Possible Scenario (Not a Prediction)

Labour	270
Lib Dem	25
SNP	35
<b>Total</b>	<b>330</b>
<b>Needed</b>	<b>326</b>

Joe.Twyman@YouGov.com  
@JoeTwyman



# Introducing YouSay – YouGov panellists in their own words

Jane Carn Qualitative Director  
@Yougovqual

**YouGov**<sup>®</sup>

# What is YouSay? Video vox pops made by YouGov Panellists

*YouSay is a new vox pop video service from the YouGov qualitative team.*

*The easy to view short videos feature YouGov panellists self-recording their opinions as video selfies.*

*They provide a valuable snapshot of an audience in their own words in their own environment.*

## YouSay – Exploring view on the run up to the 2015 General Election

- Located ‘undecided voters’ on the panel by identifying people who:

Had switched allegiances since 2010

And / or

Support a minority party

And / or

Were unable to identify themselves politically

- Respondents invited to a ‘screening’ survey to validate key criteria (e.g. conscious intention to vote)

This is our undecided voters predictions for the 2015 elections

[Click here to view YouSay video](#)

# How can you use YouSay for your business?

- Topical stories, opinions, campaign evaluation or PR
- The power of video – video content speaks louder than text
- Authenticity of response
- Select participants based on specified criteria ( 10 per project)
- 1 week turn around

## The last word: sense of real uncertainty and pessimism from the undecided voter

*“I am increasingly worried about the homogenisation of the national political parties. I am for once in my life unsure of where to place my vote in a general election. all I feel I am faced with is a 'bunch of posh boys' who do nothing to maintain my confidence in the process for electing a central government.”*  
**YouSay participant March 2015**

Jane.Carn@YouGov.com  
@Yougovqual



# Insights from Profiles and CharityIndex

Gavin Ellison, Director Public Services & NFP

# Charity Index



# CharityIndex

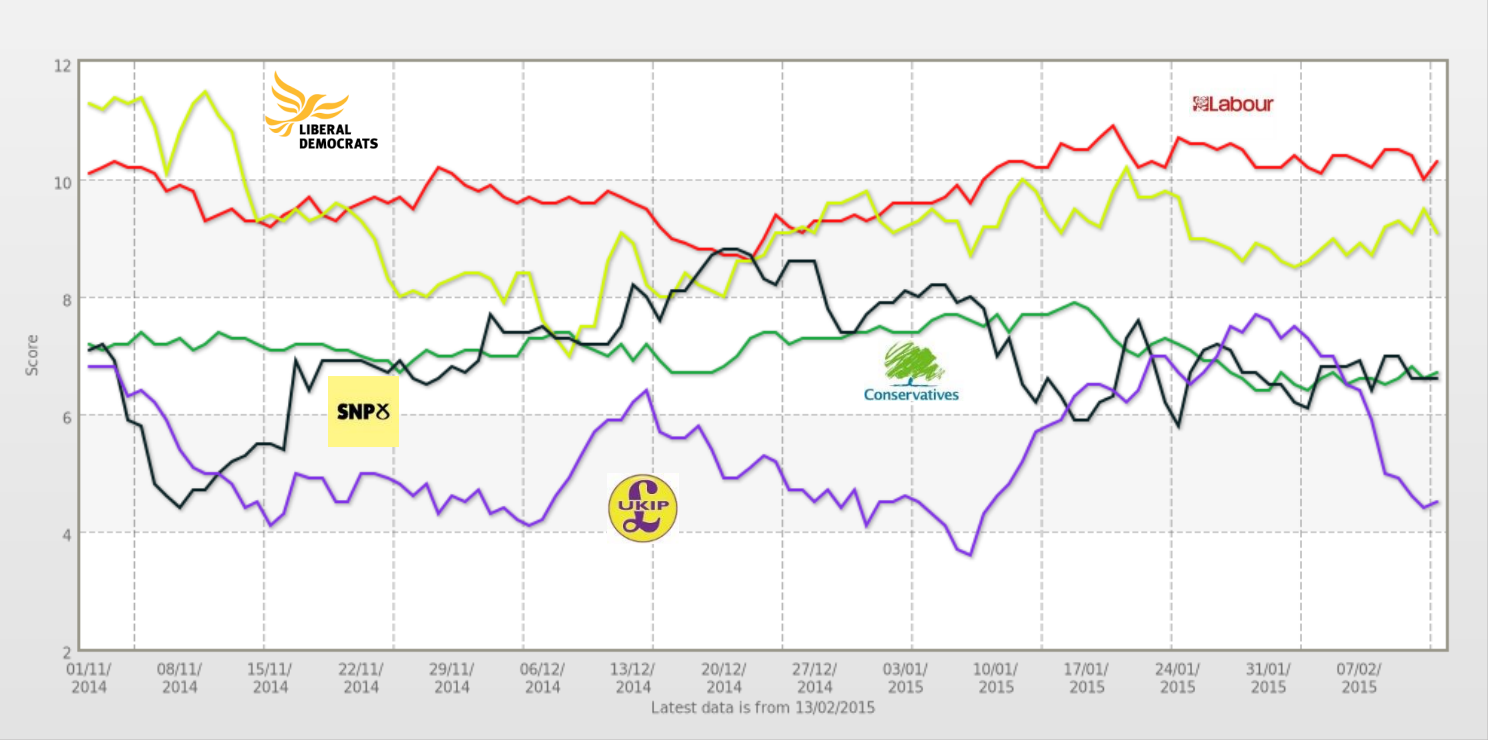
CharityIndex is the authoritative measure of perception of charities amongst the general public

It's unique.

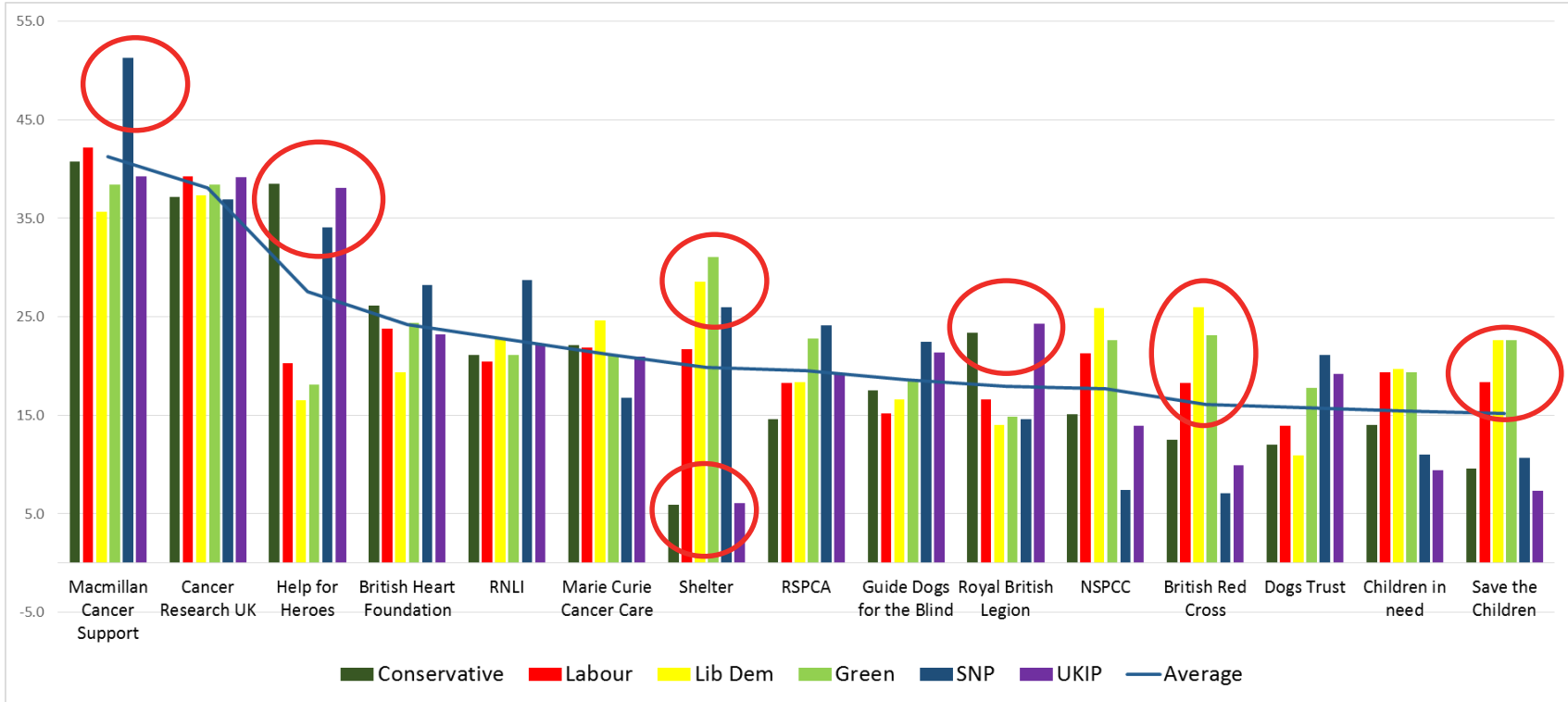
- 100 charity surveys daily, nationally representative, 16 metrics
- All the data, including competing charity brands
- All the history, not just “from now on”
- Instant data access through powerful & intuitive online interface

The screenshot shows a survey question: "Which of these charities do you believe has a POSITIVE impact on their cause?" with the instruction "Please select all that apply." Below the question is a grid of 20 charity names in buttons. The buttons are arranged in 5 rows and 4 columns. The charities are: Marie Curie Cancer Care, Royal British Legion, Macmillan Cancer Support, RNLI, WaterAid, Oxfam, NSPCC, Christian Aid, Diabetes UK, Unicef, WWF, Children in need, Barnardos, Save the Children, Salvation Army, PDSA, RNIB, Guide Dogs for the Blind, RSPB, Cancer Research UK, British Heart Foundation, ActionAid, Age UK, St John Ambulance, Shelter, Anthony Nolan, Movember, RSPCA, British Red Cross, and Childline. The buttons for RNLI, NSPCC, and RSPB are highlighted in green. At the bottom of the grid are two navigation buttons: a left arrow and a right arrow.

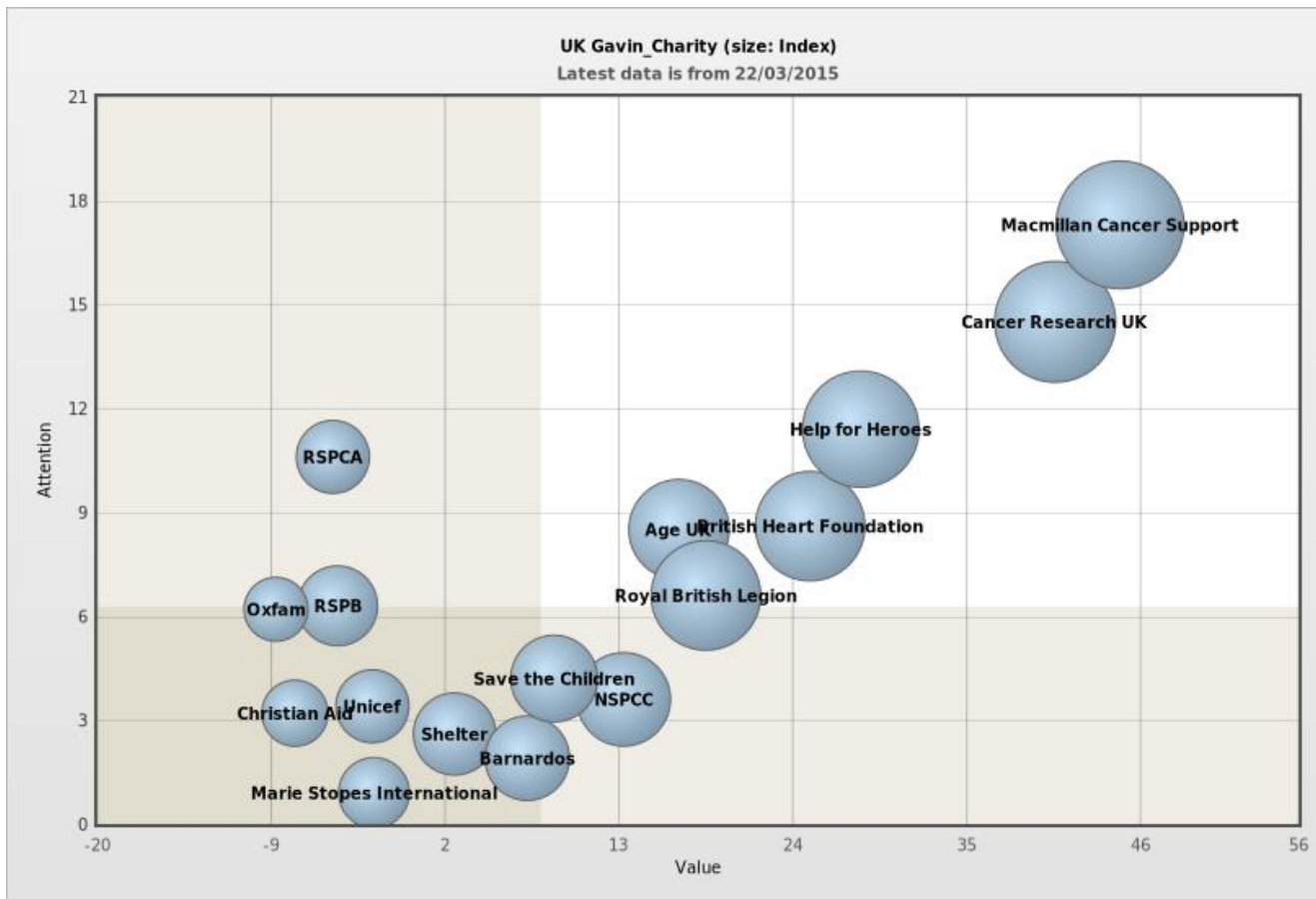
# Willingness to donate to Charity



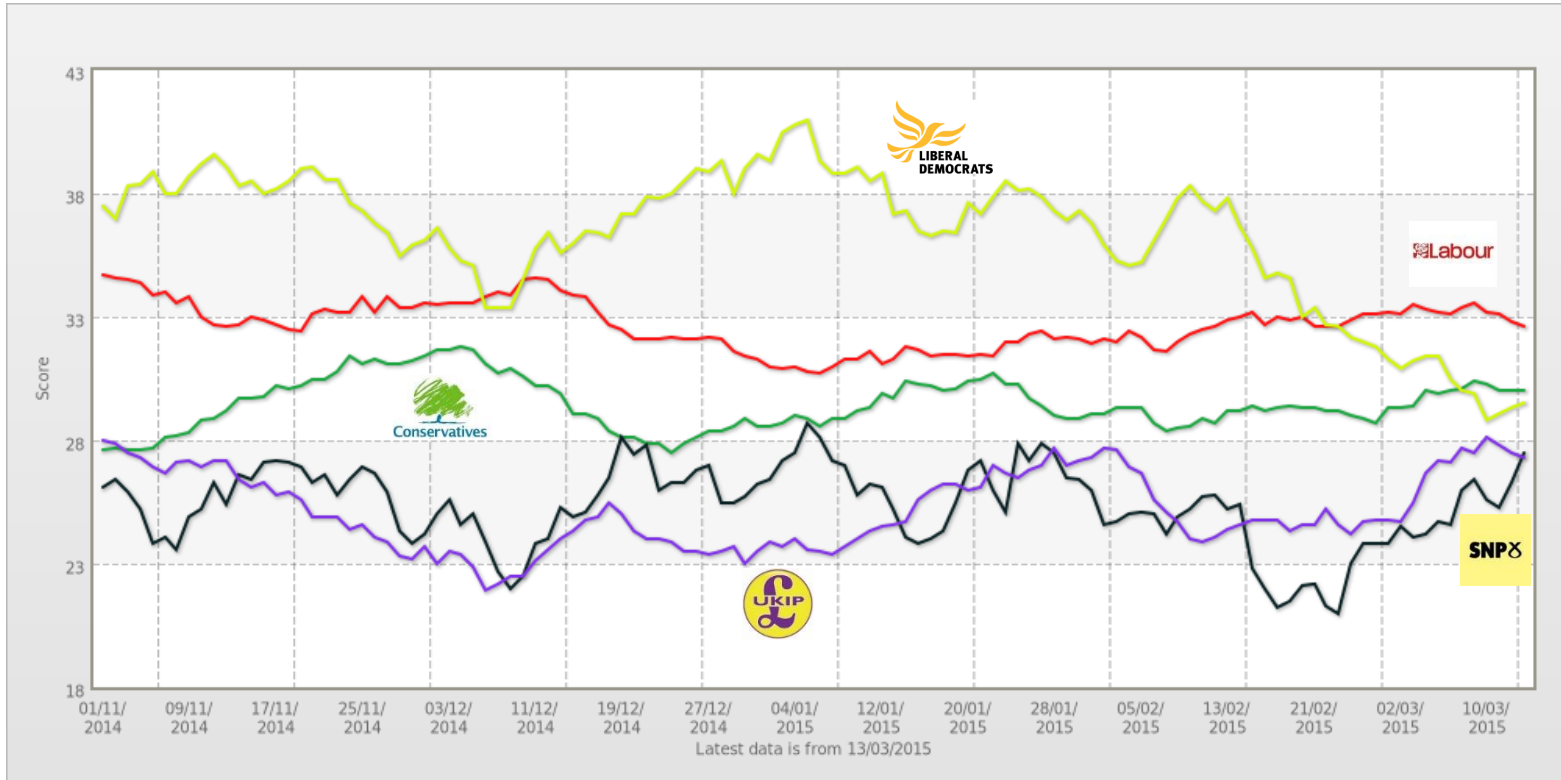
# Donate £25?



# View of Conservatives



# Impression of the Charity sector



# How Profiles can help political matchmaking



# Profiles

## A reminder

### People who donate to Macmillan Cancer Support

Cancer Support from their comparison set | Sample size: 998

ONLINE FOR...  
21-25 HRS P/W

NEWSPAPER READ  
THE SUN

MAGAZINES READ  
WOMAN'S OWN



WATCHES TV FOR...  
31-35 HRS P/W

TV SHOWS WATCHED RECENTLY  
THE CHASE  
ITV NEWS & WEATHER  
THE X FACTOR  
LAW & ORDER: UK  
GOOD MORNING BRITAIN



### People who volunteer

DEMOGRAPHICS  
GENDER: FEMALE  
AGED: 18-24  
SOCIAL GRADE: C2DE



### POLITICS



### TYPICAL PROFESSIONS

- CIVIL SOCIETY AND CHARITY
- COMMUNITY AND SOCIAL C...
- GOVERNMENT & CIVIL SERVL...

### MONTHLY SPARE £

- LESS THAN £125



# Profiles

YouGov Profiles is our segmentation and media planning product for agencies and brands. This product is powered by data collected in the YouGov Cube – our connected data vault which holds over 120,000 data points, collected from over 200,000 UK YouGov members.



## Demographics and Lifestyle

- Segment on a wider number of categories including general demographic makeup, economic situation, occupation, category specific usage and behaviour, interests, hobbies, favourite celebrities, top music artists



## Brand Usage and Perceptions

- Understand brand usage and perception for 1,100 brands (across 40 sectors) on the following core brand funnel metrics: buzz, attention, quality, value, customer satisfaction, reputation, impression, recommendation, brand awareness, word of mouth, purchase intent, purchase consideration and advert comms awareness



## Media Consumption

- Analyse consumption of ATL media including TV viewership at a programme level (4000+ titles, across 150 genres, over 20 channels), radio listenership (40+ commercial stations), and print readership (30+ newspaper titles, 80+ magazine titles)



## Attitudes and Opinions

- Measure attitudinal and opinion data from a variety of topics around the values beliefs that drive consumer behaviour



## Online and Mobile Behaviour

- Identify actual (passively tracked) online and application usage, from desktops, laptops, smartphones and tablets from a bank of 60,000+ websites and 20,000+ mobile applications



## Social Media Engagement

- Review social media engagement including Facebook pages liked (1,000,000+) and Twitter accounts (80,000+) followed

# Two listicles: issues of importance

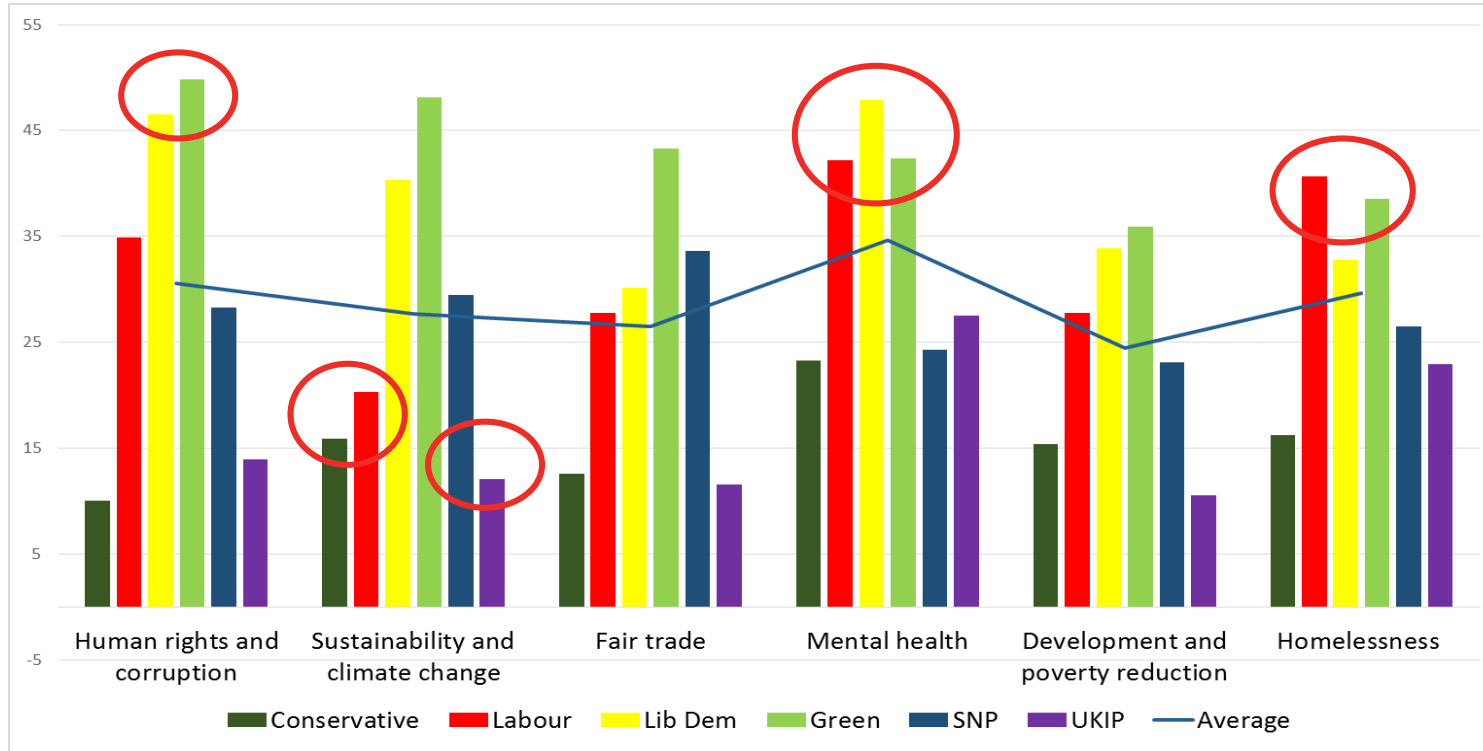
## ALPHABETICALLY

Animal welfare  
Arts, heritage and conservation  
Children's welfare  
Development and poverty reduction  
Disability and mobility  
Disease prevention  
Education and training  
Emergency relief  
Emergency services  
Fair trade  
Homelessness  
Human rights and corruption  
Local community  
Mental health  
Race and gender  
Religion  
Sustainability and climate change

## BY DIFFERENCENESS!

Human rights and corruption	15
Sustainability and climate change	13
Fair trade	11
Mental health	10
Development and poverty reduction	9
Homelessness	9
Emergency services	8
Education and training	7
Animal welfare	6
Emergency relief	6
Disability and mobility	6
Race and gender	5
Children's welfare	4
Local community	3
Disease prevention	3
Arts, heritage and conservation	3
Religion	2

# Issues of importance



# “I’m not afraid of change”

Which Party’s supporters over-index?



Which under-index?



# “I’m happy with my standard of living”



Not so sure



“Time is  
more  
important  
than  
money”

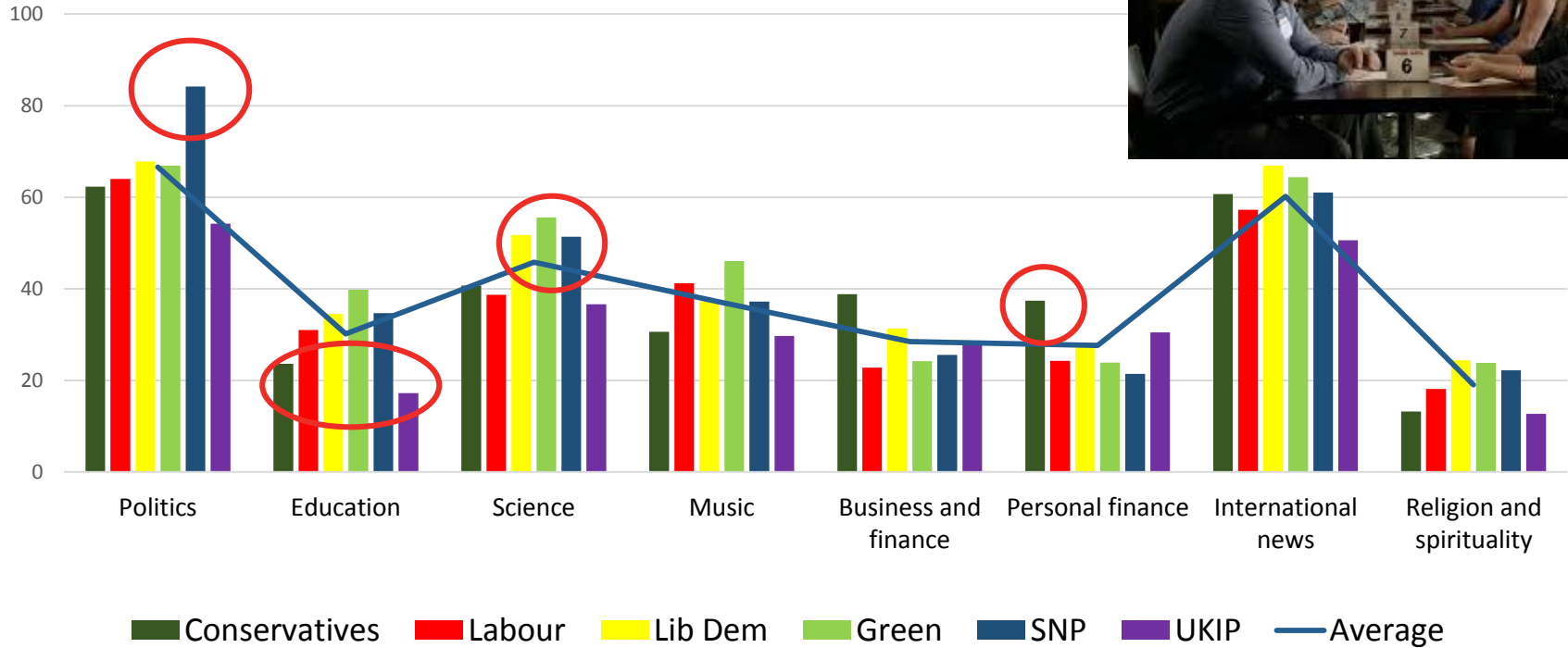


Conservatives

Er, no



# Political speed dating



# More match-making: hobbies



Conservatives



- 
1. Reading
  2. Gardening
  3. Cooking
  4. DIY



# What have we learned?



# Key learnings (1)

SNP supporters handle change well.



Labour and Lib Dems are more like to donate a spare £25 to charity.

Nick Clegg & Natalie Bennett should sit down and write music or poetry together.



## Key learnings (2)

Lib Dems and Conservatives are pretty happy with their standard of living.



Given a shared love of DIY, Conservatives and UKIP could form a pact based on subsidies for loft insulation.

Gavin.Ellison@YouGov.com  
@YouGov

# Q&A