

Yesterday saw publication of the first results from the annual BBC Wales St David's Day poll. As in previous years, the poll was conducted for the BBC via telephone by ICM. Again as in previous years, the poll covers various topics, including attitudes to devolution, climate change and migration, as well as the economic expectations of people in Wales. There will be much more about many of the findings across BBC programmes and the BBC website during this week.

For the third successive year, however, the poll also asked about voting intentions for the National Assembly. ICM enquired about voting intentions for both the constituency and the regional ballots; here are their findings for the constituency ballot:

Labour	31%
Conservatives	31%
Plaid Cymru	26%
Liberal Democrats	6%
Greens	2%
Brexit Party	2%
UKIP	2%
Others	1%

These figures continue to show the Welsh Conservatives doing very well by all historic standards; although the BC/ICM polls have not always asked about voting intention, this is the highest rating I can find for the party on the Assembly constituency vote in an ICM poll. With the Liberal Democrats' 2019 resurgence now having gone into sharp reverse, this poll suggests an Assembly election that is, at the moment at least, on course for being a close three-way race between Labour, the Conservatives and Plaid Cymru.

Using the standard method of uniform national swings since the May 2016 election to project these poll figures onto the forty Welsh constituencies, this poll suggests nine seats changing hands at an Assembly election. All would be seats won by Labour in 2016, with the Vale of Glamorgan, Vale of Clwyd, Gower, Wrexham and Cardiff North being projected to be won by the Conservatives, while Llanelli, Blaenau Gwent, Cardiff West and Caerphilly are projected to be won by Plaid Cymru. (Such projections, of course, do not factor in the local circumstances since May 2016 that might, for instance, impede Plaid's progress in places like Blaenau Gwent or Cardiff West). It should perhaps also be added that a further seat currently held by Labour, Clwyd South, is also close to a dead heat on these figures.

And what about the regional list vote? Here, the figures from ICM were the following:

Labour	31%
Conservatives	29%
Plaid Cymru	25%
Liberal Democrats	5%
Greens	3%
Brexit Party	3%

UKIP	2%
Others	2%

These figures again suggest a three-horse race for May 2021. The Welsh Conservatives are, as with the constituency ballot, on their highest-ever level of support as measured by an ICM poll. But Labour remain slightly ahead of them on this vote, and with Plaid Cymru not at all far behind.

Once more making the assumption of uniform national swings since May 2016,[#] and taking into account the constituency results already projected, these figures yield the following projected outcome for the twenty regional list seats:

North: 2 Plaid, 1 Labour, 1 Conservative

Mid&West: 2 Labour, 1 Conservative, 1 Plaid

South West: 2 Conservative, 2 Plaid

South Central: 2 Conservative, 2 Plaid

South East: 3 Conservative, 1 Plaid

(On the regional list projections, I have made a slight exception from uniform national swing for UKIP. Their vote share has now fallen so low that I regard projecting them to narrowly win one regional list seat in South Wales East - which is what UNS suggests, solely because this region was where their regional vote was highest in 2016 - as wholly implausible. If we hold to absolutely strict UNS, then UKIP very narrowly win the last list seat here, instead of Plaid.)

This produces the following overall seat numbers:

Labour: 21 seats (18 constituencies + 3 list)

Conservatives: 20 seats (11 constituencies + 9 list)

Plaid Cymru: 18 seats (10 constituencies plus 8 list)

Lib-Dems: 1 seat (1 constituency)

Any such outcome would, of course, be by some way Labour's worst-ever Assembly election result, and the best-ever one for both the Conservatives and Plaid Cymru. It would also generate a very interesting environment in which to try and form a post-election Welsh government.

This ICM poll follows the most recent Welsh Political Barometer poll last month. I [observed](#) this time last year that there did appear to be some differences between the party support levels found

by ICM and those generated for the Barometer poll by YouGov. Some of those same differences recur this year. They are mostly fairly small; while the different methods of YouGov and ICM, and the different times at which they conducted their sampling, may well do much to explain the modest differences in party support that they report. Nonetheless, as displayed in the tables below, there does seem to be emerging a bit of a tendency for ICM to be a bit more favourable to Plaid, and a little less favourable to the Tories. Of course, we have no absolute way of knowing who is right, and both ICM and YouGov are very highly-respected survey agencies.

2019

Party	Constituency Vote		Regional Vote	
	<i>ICM</i>	<i>YouGov</i>	<i>ICM</i>	<i>YouGov</i>
Labour	34	32	32	29
Conservative	23	26	22	24
Plaid	27	23	25	23
LibDems	7	8	6	6
UKIP	5	7	6	6
Others	4	5	9	12

2020

Party	Constituency Vote		Regional Vote	
	<i>ICM</i>	<i>YouGov</i>	<i>ICM</i>	<i>YouGov</i>
Labour	31	33	31	32
Conservative	31	35	29	32
Plaid	26	19	25	19
LibDems	6	5	5	5
Others	7	8	10	11

Overall, although ICM and YouGov may produce slightly different findings, they are in broad agreement on the general state of the parties in Wales. They suggest that we are currently facing a three-cornered contest for the next National Assembly election, with the Conservatives and Labour currently a little way ahead of Plaid Cymru, and all other parties a long way further back. But there is more than a year to go, and after the political rollercoaster ride of 2019 it would be foolish to predict what the next fourteen months will bring.

ICM interviewed a sample of 1,000 adults in Wales by telephone between 4-22 February 2020.