

# GUEST EDITORIAL

## A shortage of optimism

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Neither main party has a path to a stable parliamentary majority.

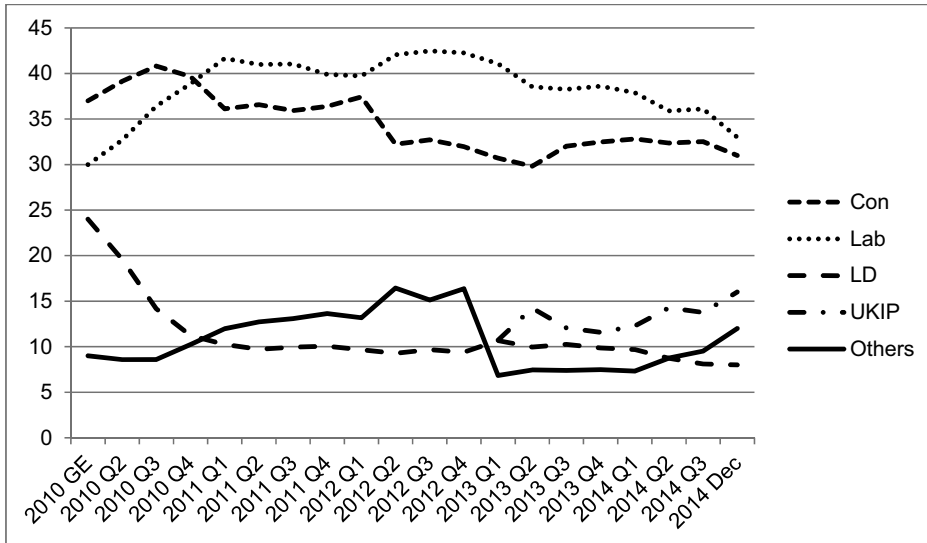
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The article deals first with the fortunes of the Labour Party, and by extension the parties as a whole, during the period since the 2010 election, noting the relatively gradual changes that have taken place during the parliament leading to a surprisingly radical reconfiguration of the party system and the strategic opportunities for Labour and the other parties. It is unlikely that parties can form stable coalitions of support sufficient to win majorities of the sort that underpinned the Thatcher and Blair eras, and therefore probable that the politics of the 1970s – small majorities, frequent changes of government and heavy external constraints on policy – are more relevant to the current situation than the period between the consolidation of Thatcherism in 1982 and the financial crisis of 2008.

### **Trends in public support for Labour 2010-14**

Despite the frequent claim that the electorate is more volatile than ever before, the movements in public opinion during this parliament have been impressively gradual for the most part. The gyrations that took place in the polls during many previous parliaments over fairly short periods have not happened since 2010. Instead, there have been some slow and mostly explicable transfers of support.

Chart 1: Percentage voting intention (Great Britain) by party for each quarter since the 2010 general election



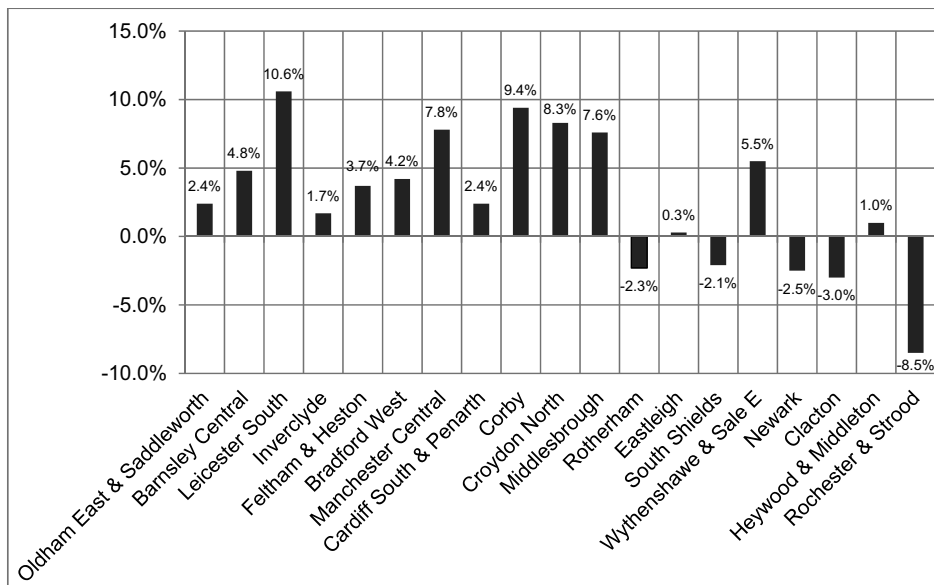
Source: Adapted, with thanks, from Mark Pack opinion poll series (<http://www.markpack.org.uk/opinion-polls/>); three month averages of all published polls. UKIP support is included in 'Others' prior to 2013 Q1.

1. The decision of the Liberal Democrats to join the Coalition with the Conservatives, and their abrupt policy shifts on the economy and taxation, as well as their signature 'betrayal' on tuition fees, gifted a left-leaning section of the electorate to Labour. By the end of 2010, Labour was back in contention.
2. A period of fairly close competition between Labour and the Conservatives followed. Labour's local election performance in 2011 was adequate rather than impressive, with a strong swing in metropolitan areas of the north contrasting with good Conservative performances in the south and in smaller towns, and the SNP landslide in Scotland. This period lasted from late 2010 until the 'omnishambles' budget in March 2012 when there was a pronounced swing to Labour.
3. Labour enjoyed a period of dominance that lasted into 2013, although support for UKIP was creeping up in the polls. Labour achieved its best local elections and by-elections in this period; the May 2012 local elections were a Labour landslide in some marginal areas such as Dudley, with the London mayoral result being the only major setback; marginal Corby followed in a November by-election.

4. The swings to Labour in by-elections dropped from the start of 2013 onwards, and in the county council elections in May Labour’s performance was notably worse than in 2012 in comparable areas as UKIP ate into the anti-government vote, followed later in 2014 by advances for the SNP and the Greens. The year 2014 ended with Labour enjoying – if that be the word – a slight lead in an unpopularity contest, with both parties being somewhere around 30-33 per cent.

Although by-election swing is a rough and ready indicator, complicated by the irregular sample of seats that are affected and the particular conditions of each campaign, the data does illustrate the stalling of Labour’s momentum at the beginning of 2013. The following chart shows the swing since the 2005 election (not 2010) to illustrate the extent of change since Labour last won a general election. The swing figure is that between Labour and Conservative, stretching the use of ‘swing’ a bit because only four of the 21 by-elections this parliament (two of them in Northern Ireland) have seen the big parties both place first and second. Labour were racking up respectable swings to the party in nearly all contests between the start of 2011 and late 2012, but since then the swing has been weak or towards the Conservatives.

Chart 2: Con to Lab swing since 2005 in by-elections during the 2010 Parliament



Local election performances also illustrate the point. The pattern of local elections has become increasingly complicated and differentiated by region and level of urbanisation, but the results in Ipswich, a town lying close to the demographic average where both Labour and Conservative have traditionally been well-organised, are indicative.

*Table 1: Vote shares in Ipswich borough since 2010*

per cent vote	Con	Lab	Lib Dem	UKIP	Green
2010 local	38.3	34.9	25.3	-	1.2
2011	37.0	47.4	13.0	-	2.3
2012	31.9	51.9	10.6	-	5.1
2013	24.8	39.8	8.7	19.7	6.9
2014 local	27.5	38.0	8.2	21.3	5.1
2014 Euro	22.1	28.9	4.8	31.1	7.9

In the year and a half after March 2012 it was possible to write optimistically about Labour's prospects of assembling a coalition of support that would be sufficient to win a workable majority and a meaningful mandate, at the very least for the 2015 election, even if it might prove difficult to fashion it into a lasting ascendancy. The author's own *Marginal Difference* (September 2012) and Marcus Roberts's *Labour's Next Majority* (September 2013; see Baston et al. 2013), were both products of a strategic optimism for Labour that was created by the expectation of a partial reversion to two-party politics following the fragmentation of the electoral base of the Liberal Democrats. With around 5-6 per cent of the voting population joining Labour from the Lib Dems, added to the hard core vote of 29 per cent in 2010, Labour did not have to do much to draw level with the Conservatives in popular support. Mobilising some previous non-voters and winning a handful of direct switches from the Conservatives would put Labour over the top. The resulting government would have rather more flexibility to tack to the left than was open to the Blair governments, because it would owe relatively little of its strength to triangulation or the traditionally conceived centre.

Without there being a clear reason for it, this vision started to slip out of focus during 2013 and was difficult to recognise at the end of 2014. Labour's poll ratings have declined gradually from the mid-40s in 2012 to the low 30s at the end of 2014.

The resumption of economic growth coincides with this loss of momentum for Labour, but it is hard to see a direct link between the two because it has not followed the classic pattern of government recoveries from mid-term troughs; the coalition parties' poll ratings have been stagnant over the same period. Support for UKIP is driven by persistent pessimism, not rising economic optimism.

The gradualness of the decay of the Labour share of the vote since early 2013 has made it rather difficult for the party to take the trend seriously, identify its causes and take action to reverse it. The traditional comparison is with boiling a frog – a party that sees its ratings plunge from 42 to 33 per cent in the polls knows it is in trouble, while when there is a steady loss of a fraction of a percentage point most months it is hard to find a point to start ringing the alarm bells. By the end of 2014, a Labour voting intention figure of 34 per cent started to look encouraging.

But time is running out for two polling phenomena which many have expected to kick in before the next general election. The first expected pattern was for the support for insurgent parties to fade as the choice of governments started to loom larger in the electorate's minds. Thanks to the general slough of despond, and the timing of events like the European elections and the Clacton by-election, there has been little sign of this happening. UKIP has continued to poll upwards of 15 per cent of the vote, and the SNP and the Green Party were on an upward trend as well during 2014. The combined Conservative, Labour and Lib Dem vote share hardly saw 80 per cent in the polls in 2014 and sometimes slipped below 70 per cent (it was 90 per cent in 2010). The vote for the others may subside as the election approaches, but this cannot now be regarded as a certainty, merely an unproven possibility.

It was also widely expected that the Conservatives would move ahead of Labour once the economy showed signs of improving. The severe economic underperformance of 2010-13 has come to an end, and some polls have showed a huge spike in economic optimism since spring 2013. While Labour's lead has drifted down since the heights it reached in 2012, this has not been because the Conservatives have regained any support, and the blue line has remained narrowly and stubbornly below the red line on charts of voting intention. The polling trends are following wages and living standards in remaining stagnant. None of the main Westminster parties currently has much wind in its sails.

The 2012-vintage path to a Labour win in 2015 seems to have vanished because one of its supporting assumptions has collapsed – a more or less united centre left

against a divided centre right and right, the most potent recipe for success under first past the post. As long as UKIP was detaching 6-10 per cent of voters from the Conservatives, Labour could look upon the situation benevolently. But the party was still behaving this way in the run-up to the May 2013 elections, when UKIP was breaking out of its right-wing ghetto, and even afterwards. It is reminiscent of the story of the introduction of cane toads in Australia – UKIP was supposed to be helpful as far as Labour were concerned but it has become an invasive species in the ecosystem of opposition politics. Potential predators – on left and right – have ended up poisoned, rather than strengthened, when they try to attack it. With UKIP competing for pessimistic, left-behind voters (the classic clientele for mid-term protest opposition), Labour also started to lose some of its idealists during 2014, suffering losses to the SNP in Scotland and among younger, liberal voters to the Green Party.

Expectations for the next election are therefore different from what they were before 2013. It seemed quite possible that the combined Labour and Conservative share might bounce back to 75 per cent or more, and that given how difficult it is for an incumbent government party to add to its support after a full term (only in 1955 has this ever been done), this meant a structural advantage for Labour. But in a situation where the two main parties combined are at their second-lowest ebb ever (late 1981 and early 1982 remains the all-time nadir), the threshold for being the largest single party in parliament is very low. Instead of a temporary reversion to two party politics, as looked likely in 2011-12, the electorate looks more fragmented than ever.

## Strategy in a multi-party world

Our traditional models of political competition have depended on the assumption of a high barrier to entry to the political market place, and the reluctance of voters to exercise an 'exit' option when discontented with the available options. The barriers started to crumble in the 1970s – first with the drop in turnout in 1970 and then with the surge for Jeremy Thorpe's Liberals, and the SNP, in February 1974. The pace of change has quickened recently; in 2001 turnout dropped dramatically, and UKIP and the Greens have emerged as serious competition, first in proportional elections (notably the European Parliament), then in local elections and parliamentary elections. The idea of a 'minor' party winning a national election (as UKIP did in 2014), or running a large city council (as the Greens have done in Brighton since 2011) would have been inconceivable as recently as 2005. There may no longer be a 'centre' (and it was always a metaphor rather than a fixed reality); in the media and Westminster the centre tends to be fiscally austere, pro-business and globalisation

but socially liberal and relaxed about immigration. Although voters instinctively like to feel moderate and reasonable, there are not many takers out there for this policy mix. If the political system as a whole is regarded with contempt, triangulation can just mean occupying the most emblematically distasteful policy stances and ways of doing politics.

In 2011 Stuart Wilks-Heeg of Liverpool University, in conversation with the author, ventured the hypothesis that neither of the main parties has a stable path to a parliamentary majority. Neither has enough of a core vote upon which to base an election-winning coalition, and trying to broaden out in one direction means shedding support in another direction. Should Labour go more socially conservative to win voters back from UKIP? You might win some of them, although they are cynical about all political offers, but then you might lose voters to the Lib Dems or the Greens in marginals like Broxtowe or Lancaster. Propose higher taxes and clamp down on the public schools? It might stop the drift to the Greens, and harden up ex-Lib Dems, but it might also give the Tories what they need to scare traditional floating voters into voting for them. If the Conservatives ramp up the rhetoric on immigration, they might recover some ground in the short term but destroy their future chances of winning a majority by alienating a growing demographic. Can the Lib Dems claw back some ground by differentiating themselves from the Conservatives, or would it just alienate the dogged minority who have stuck with them during the coalition years?

Under first past the post, the distribution of a party's vote matters a lot. While the Lib Dems' national share of the vote may be the worst since 1970, they could, even so, survive in as many as 30 constituencies. A considerably smaller SNP wave than is indicated in current polls would give them perhaps 25 seats; with the Northern Ireland parties, Plaid Cymru and a handful of UKIP, Greens and others, there could be around 80 MPs not affiliated to either of the two main parties, setting a high barrier to winning an outright majority. We may see electoral reform on the agenda again surprisingly soon.

## The prospects for the 2015 election

It became harder, during 2014, to see a path to an outright Labour victory. There have been several pieces of evidence suggesting this:

- Probable losses to the SNP mean that Labour will end up having to win more seats in England to gain an overall majority – and will be lucky if this extra

burden is less than 10 seats. This will not interfere much with Labour's chances of forming a government, but is bad news for a majority.

- Polling evidence continues to show that the Conservatives have an advantage on two basic perceptions that influence the electorate's choice of government – leadership and trust in economic management. While this may be priced in to current polling numbers reflecting an even balance between the parties, it will influence the way the 2015 campaign plays out and will affect Labour's ability to add to its support in campaign conditions.
- Although Ed Miliband is an under-rated figure and has made some good strategic calls since 2010, he has made some significant errors recently – notably his conference speech which was an 'unforced' error, and the loss of Emily Thornberry which was probably a 'forced' error (there was no decision that led to a good outcome, but he could have handled it in a less awkward fashion). Miliband's political style is about appealing to rationality and piecing together sensible policy offers, but the mood of the times is more about gut feel, story-telling and the electorate's cynicism about all politicians.
- The Greens have been picking up support in the national polls on a nearly unprecedented scale (one has to go back to their brief boom in 1989 for a comparison). Most of this is either from Labour, or else from ex-Lib Dems who would otherwise be voting Labour. In 2012 it looked like UKIP would drain a few per cent off the Conservatives while the left was united behind Labour, but now a competitor has emerged that could hinder Labour in marginal seats.
- The UKIP vote has remained surprisingly strong, even with the next election approaching. Although its supporters are mostly ex-Conservatives, with support in the mid-teens per cent it is above the point where it is most helpful to Labour in winning seats from the Tories. UKIP's profile has also shifted to be more attractive to ex-Labour voters and people who oppose the government (as we saw in Rochester).

However, the path to an overall Conservative victory is no clearer than it has ever been; it requires nearly everything to go right for the Tories.

- There is no evidence from constituency polls that they are making sufficient potential gains from other parties to get over the 325 seat threshold. Lord Ashcroft's recent constituency surveys point to the Lib Dems holding on reasonably well in many of the Lib/Con marginals, and there have been no



surveys in Labour seats showing a Tory gain. Labour is also ahead in a fairly wide swathe of Conservative-held marginals.

- Conservative polling support has not risen much despite the change in economic circumstances; the narrowing of Labour's lead has been because of falling Labour support, not any recovery for the Conservatives.
- The Green factor may not materialise; unlike UKIP, the party struggles to find enough candidates to stand in areas where it is not very strong, and its supporters are particularly likely to vote tactically against the Conservatives (in some inner London seats the Greens were getting about 10 per cent of the local government vote in 2010 but less than 2 per cent of the General Election vote).

It remains possible that one party or another can break out of this holding pattern. Voters remain discontented and their political party affiliations remain lightly held, making it possible that events or the election campaign itself could cause big movements in public opinion (for a recent example one only has to look at the Scottish parliament election in 2011). If there is a dramatic development that shifts the 'tectonic plates', it is much more likely to favour the Conservatives than Labour because making the most of such an opportunity requires a supportive media and a tightly disciplined central campaign. Bluntly, the next election is winnable if one of the main parties plays its cards well and the other party screws up, and the odds on this favour the Conservatives. Labour's strengths are more in its grassroots campaign and in the larger number of potential voters it may be able to win over because its brand is less toxic than the Tories'.

However, the principal likelihood is that neither party can break out of the stalemate. The Conservative vote is overwhelmingly likely to be between 32 and 37 per cent, and highly probable to end up around 34-35 per cent. There is more potential variation in the Labour vote, but it is hard – unless the campaign the party runs is truly catastrophically bad – to imagine it going below 31 per cent.

## **Conclusion: dark vistas**

The political mood is melancholy. The party conferences, more than ever, seem like meaningless rituals. The only people who have had any fun have been the SNP (and the wider Yes campaign in Scotland) and UKIP. Responsibility has been a burden: for leaders of local authorities, for government, and for the opposition that hopes to be the government. Darkening the mood even further is the thought that the next parliament may be even worse.

Disaster and crisis seem to be on the way in the NHS, the welfare system and in everything the major local authorities try to do in the face of massive budget cuts. The deficit is still enormous, aggravated by the unnecessarily slow recovery and the structural change in the economy – while once an inflated financial sector could generate funds which one could use to good effect, now a low-pay economy (and the policy of raising tax thresholds) means that the tax revenues are just not coming in. But the Conservatives still brandish tax cuts for the better-off, even as they propose, under cover of deficit reduction and the ‘global race’, a drastic reduction in the size of the state in the years to come. It is hard to see what Labour can do even to maintain cherished institutions like the NHS and local democracy at current levels without fairly large tax rises, which are not currently proposed.

Politics today looks like the grim vistas on offer in 1974 and 1981, but with the social bases of the parties hollowed out and the public even more alienated. A social democratic project requires more than just a policy agenda – which Labour, within the frightening constraints that bind it, has successfully constructed. It requires a mandate to implement it, and even if Labour does win outright, an electoral base of 35 per cent is a weak foundation on which to build – just as 39 per cent in troubled times was not enough after October 1974. Labour’s political capital was spent on a successful effort to get the economy back on a stable footing, while the Conservatives used opposition to devise a transformational project of their own.

Social democracy requires optimism, which is in short supply, and also a sense of the value of collective endeavour which seems to be waning over the long term. It is quite possible that Labour will get a result something like October 1974 – an unworkable, small majority and a nightmarish hard slog in the years ahead. At least the Labour Party is less divided than it was in the 1970s. That, I regret to say, is the relatively optimistic scenario. In the dark hours of the night, I sometimes wonder whether our political, economic and social system is broken beyond hope of repair.

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*This is a revised and expanded version of the essay ‘Dark Vistas’ that first appeared in Progress magazine (November 2014) and which can be found online at <http://www.progressonline.org.uk/2014/11/11/dark-vistas/>.*

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