

That was the year that was (it's over, let it go?)

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So 2019 turns out to be the year where Brexit looks set to be realised, with Parliament due to vote on Boris Johnson's revised withdrawal agreement to effect a January 31st departure from the EU. Accordingly the Government has announced that the Department for Exiting the European Union (DExEU) will be abolished, assumedly with its functions incorporated into the Department for Industry and Trade (DIT) and the Foreign and Commonwealth Office (FCO).

Looking back over 2019 the most notable event of course was Theresa May's failure to navigate her withdrawal agreement through Parliament, with the original exit date of March 29th having to be extended by six months. This led to the Brexiteer "coup" that resulted in her downfall and replacement with BoJo heading up a distinctly pro-Leave Cabinet. Johnson, a man given over to rhetorical flushes at the best of times, of course declared that he would rather "die in a ditch" than extend the date of leaving the EU beyond October 31st.

However, extended to January 31st 2020 the date was and Johnson carried on as Prime Minister, but without a working majority in the Commons. The subsequent stand-off in Parliament ended with a Johnson victory in the election on December 12th and the virtual extirpation of the "moderate" wing of the Conservative Party that saw the exit of high profile MPs such as former ministers Phillip Hammond, David Gauke and Amber Rudd. All those that had left the Party, such as Anna Soubry, suffered electoral oblivion also.

That Johnson was able to secure an 80-seat majority is even more remarkable when you consider that the Tories had been in Government for nine years and offered little to the electorate beyond getting Brexit "done". Now that Brexit is assumedly "done" the PM wishes to remove mention of the word in Government discourse.

Of course, Brexit is not "done" – the Withdrawal Agreement (as we have mentioned repeatedly) is only "Stage One" of the attempt to

negotiate a new economic relationship with the EU. And the prospect of these negotiations being concluded by the end of December next year seems remote, unless the Government accepts a Norway-style relationship with the EU (ie membership of the Single Market).

This seems unlikely. Hence, by the middle of next year we could well find ourselves in a “no deal” type cliff edge scenario all over again (for which – at the risk of tempting fate to suggest – we will have ample time to comment on in future postings here).

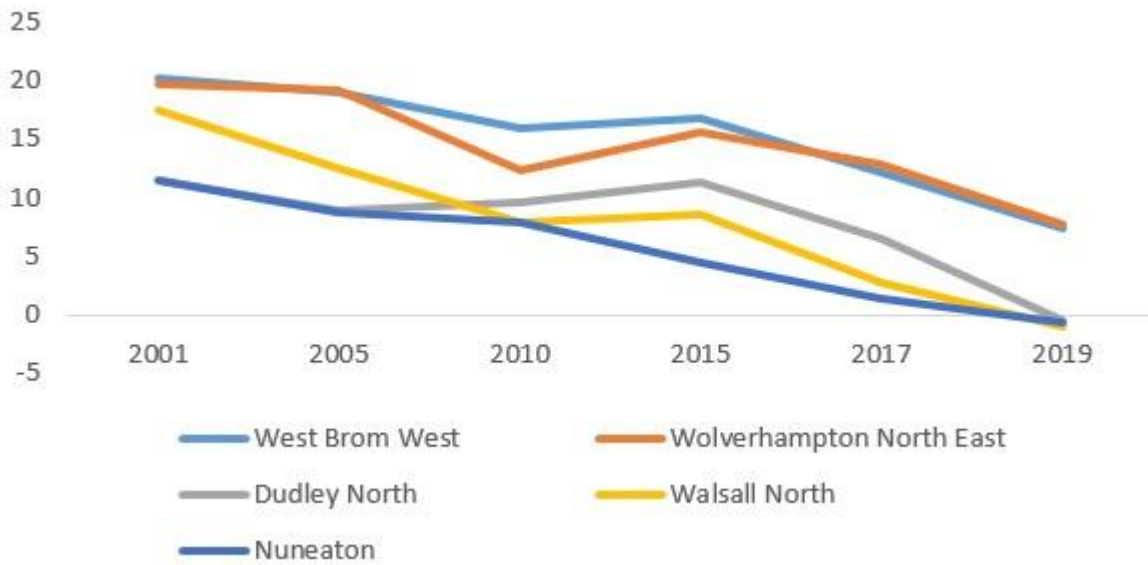
However, Johnson managed to “sell” Brexit to scores of Labour voters in the Midlands and North of England that resulted in an 8% swing against the Labour Party. Accordingly, at this point it is worth asking the question, was this apparent switch of allegiance simply due to the Boris Bounce (trusting the PM to deliver on the 2016 referendum result) or is something more deep-seated and fundamental going on? In other words, has the blue-collar electoral base of Labour eroded over the longer term?

To try and answer this we compared the Labour vote in selected constituencies in the West Midlands that voted in a Conservative MP on December 12th this year, relative to the UK average for every election from 2001 onwards. We subtracted Labour’s national vote share from the totals to see how these seats are moving *relative to the national average*.

The results are striking. Taking ethnicity and education levels as key defining demographic indicators, we can split these seats up into two groups; first, those that are predominantly white; and second, those with substantive ethnic minority groups.

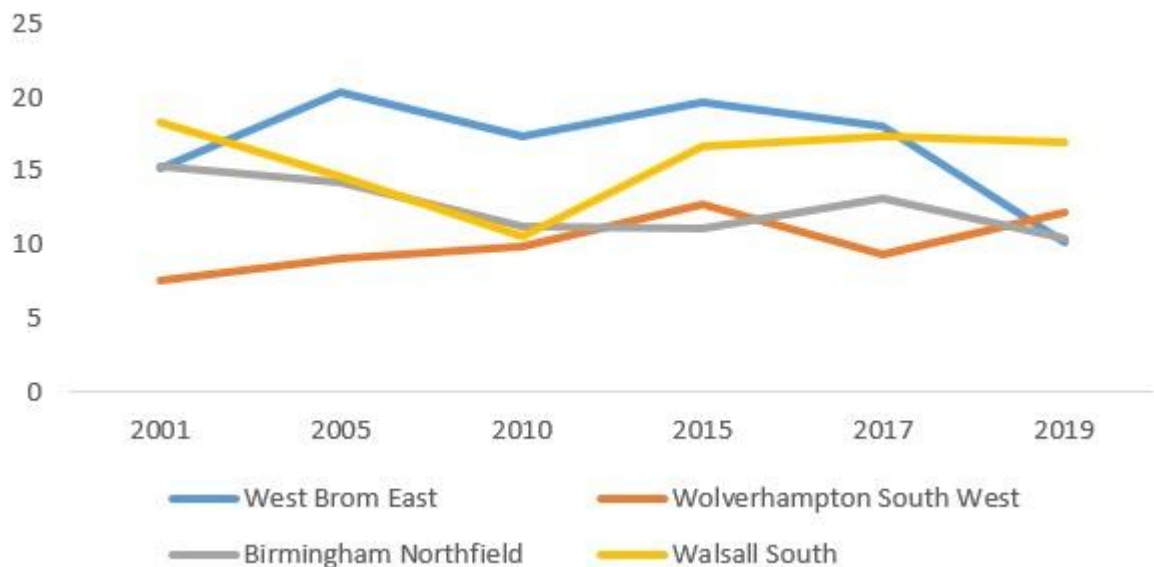
What is evident in Figure 1 is that constituencies that are predominantly white show a clear trend deterioration in Labour performance relative to the UK average over time. Our own West Midlands “Workington” men (and women) appear then to be increasingly deserting the Labour party as traditional loyalties break down.

Seats Trending Away from Labour



In contrast, in constituencies with a higher ethnic minority presence such as West Bromwich East, the Labour performance has held up remarkably well and we think can be attribute to the BME vote largely staying with Labour. The Conservative victory in these seats then could well be short-lived and we would expect demographic shifts in the next five years to return these seats to Labour.

Seats Not Trending Away from Labour



Northfield, though carrying a similar demographic profile to the seats in Figure 1, is included here because of demographic shifts (more ethnic minority voters, professional workers moving into new housing developments around Kings Norton and Longbridge etc.) that we think will return the seat to Labour in the next election.

In a similar fashion, Wolverhampton South West is strongly trending Labour over time – we fully expect them to regain it – as a result of a growing ethnic minority vote. Given that this constituency was once represented by one Enoch Powell, there is no shortage of irony here.

So, (the caveats of the limited nature of this analysis only looking at West Midlands seats around Birmingham) does this mean that BoJo will be able to keep a winning electoral coalition together? Perhaps, if the trend of “Workington Men” voters deserting Labour continues in the fashion evident above.

We do actually expect this trend to continue, as Labour continues to move away from its blue-collar origins to be a refuge for self-styled middle-class “progressive” professionals and the Conservatives continue to bang the drum of identity-based politics that has had such seeming appeal to white, blue-collar voters. For Labour then, it could well be a case of “let it go”, and concentrate campaigning efforts elsewhere.

The question then is, can Labour improve its trend performance in the South of England, particularly in the commuter towns around London that have become increasingly attractive to those priced out of the London market, to offset the above? As we approach the end of the year that was, next year promises to be even more interesting. Happy Brexmas everyone.