It's not all about the "red wall"

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The election results from early May saw the usual outpouring of commentary. The near-universal conventional wisdom is that these elections were a disaster for the Labour Party and a triumph for Boris Johnson's Conservatives, with the notable exception of Scotland.

I have a profoundly different view. The longer-term trends look potentially disastrous for the Tories. Why do I take such an apparently contraire view? Well, let me caveat this by saying that I do not expect Keir Starmer to be the beneficiary of these trends (much like Neil Kinnock failed to reap the rewards of a pivot to the centre in the 1980s or Michael Howard in the mid-2000s).

Likewise, I agree with the general view that the largest immediate threat to Johnson's legacy remains the potential break-up of the UK. However, there is a widespread perception that the strategy of pivoting to address the concerns of the so-called "working class" voters in red wall areas is costless. It is not.

The price that must be paid is the continued alienation of other, less socially conservative, groups. In particular, the authoritarian style espoused by the Johnson government, alongside a tendency to waive the rules when it suits do not go down well with many graduates.

The incendiary language employed by senior ministers, hard-line stance on immigration and general unwillingness to address (even cosmetically) issues of systemic racism are hardly likely to endear the government to ethnic minority voters. It's similarly hard to imagine that the legal profession is terribly enamoured with a government that has repeatedly criticised the country's most senior judiciary.

Whilst attention might be focussed on the travails of the Labour party, it's telling that the Conservatives lost 8 council seats in Cambridgeshire and 9 in Oxfordshire. Indeed, even in the Conservative bastion of Surrey, the party won the fewest seats that it has since 1997[1]. St. Albans should be a cautionary tale of where such things can lead.

Indeed, whilst the victories of Andy Street in the West Midlands and Ben Houchen in Teesside made up the "hat-trick" of Conservative wins (along with Hartlepool), Labour took control of the mayoral positions in the West of England and Cambridge and Peterborough. Whilst they celebrate spectacular gains in some northern seats, Conservative support appears to be quietly eroding in their southern heartlands.

Having said this, of course, this should not be cast as a simple north vs. south divide. Across a swathe of areas from Liverpool in the west, through Greater Manchester and into Western and Southern Yorkshire the Conservatives struggle to make headway. Perhaps this should not surprise us – these are areas that have been hit hard by Covid and the associated restrictions.

Andy Burnham's decision to take a very public stand against the government has done him no harm in the eyes of Greater Manchester's voters. Rightly or wrongly, many perceive that it is one rule for London and another for the rest of us. A second reason for the continued strong showing of Labour in these areas is demographics.

Many cities have a notably younger population than the surrounding areas. This is true in both Manchester and Leeds as well as in Coventry and Birmingham. A significant student population also contributes. However, even in areas outside the urban "core" there are often large numbers of ethnic minority voters. It is this that separates Bradford and Blackburn from Hartlepool.

The same trends are visible in the West Midlands where Coventry and Sandwell look very different to Walsall and Dudley. Wolverhampton is a tale-of-two-cities insofar as wards in the centre look (and vote) very different to those around the outside.

Brexit is a part of this reshaping of the political landscape, of course. It clearly rewrote the rules of British politics. However, these trends predate Brexit, which acted as a catalyst rather than a cause.

Yet beyond Brexit and beyond these local factors lies a striking tendency: the changing split of the electorate along demographic lines. Whilst there has long been a split between the young and those who are older this has become more acute.

What is new is the dramatic reshaping of the electorate by education level. Note that what follows is calculated from the British Election Study data.

The Conservatives won the 2019 election on the back of voters without a degree or equivalent[2]. Of voters whose highest qualification was an A-level or lower, they won a remarkable 51.2% of all votes. Labour, in contrast, won just 29.2% of votes in this group and the Lib Dems received just 9.1%.

Had the 2019 election been decided by graduates, Labour would almost certainly have been the largest party[3]. Amongst those under the age of 65 with any higher education qualification, they were over 10 percentage points behind Labour.

Let us be clear, this is not due to people voting for left-of-centre parties when they are young before becoming more right-leaning as they age. To see this, look back to the last election (pre-2017) where the Conservative vote-share was similar to 2019, all the way back in 1992.

Then, those with a higher education skewed Conservative. Meanwhile, they still won the largest vote share of under-65s. Indeed, back in 1992 the Conservatives performed well amongst the under-40s. Not so today. Amongst graduates under 40, they received less than 22% of the vote (compared to Labour's 55.5% share) in 2019.

Each year, almost half of 18-year-olds go on to some form of higher education. Similarly, a growing proportion of the population come from some kind of ethnic minority background. It's hard to see a long-term future for a political party that fails to address the concerns of these groups.

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[1] Although not strictly comparable because there were significant boundary changes in 2005, percentage of seats won was also lower than at any point since the 1990s.

[2] This is defined quite broadly.

[3] With 38.5% of the vote, compared to 36.4% for the Conservatives.