

Explaining fragmentation in British politics:

Analysing the polls in the 2019-2024 parliament.

By James Prentice

In summary, this research paper identifies:

1. Fragmentation mostly occurred from the collapse of the Conservative 2019 vote. Labour was the main beneficiary of this collapse, but Reform also gained.
2. Labour's vote also split, with them losing to the Greens and Reform. Yet, this was masked by accumulating Conservative 2019 voters.
3. Fragmentation was caused by external and internal shocks that have caused voters to question the competency of the main parties.
4. External shocks, like the pandemic and inflationary spikes, caused voters to think about other divisive issues. Changing salient thoughts weakened the pro-Brexit Tory base and made fragmentation possible.
5. Economic factors were highly influential in fragmenting the vote. Cost of living spikes split the Tory 2019 base. Also, failed economic policies changed which party the voters perceived as most economically credible and from this, split the vote.

6. Changing perceptions of the parties and their respective leaders also helped to split the Vote. Internal shocks, such as instability in Conservative Party leadership, assisted Labour and Reform in taking support from the Tories. Labour's changed leadership helped the Greens to gain.
7. Smaller parties gained from the two main parties when they considered non-economic issues to be important. Reform gained from the Tories when voters prioritised immigration, and the Greens grew when people considered the environment to be salient.

Introduction:

In the aftermath of the 2017 and 2019 general elections, a clearer party system had emerged. Although multiple parties had representation across the UK, due to the First Past The Post system (FPTP), there was a clear two-party dominance. Indeed, throughout most of the last parliament, only two parties were able to poll consistently above the 10% mark, see Figure 1. This occurred despite a pandemic forcing the country into tough lockdown measures. Even with Johnson's party-gate scandal, Truss' failed mini-budget and a high inflationary period, smaller parties could not break through. For some, this will have created the assumption that the realignment that emerged in the late 2010s was set to continue. Yet, from late 2023 onwards, Reform made significant gains, resulting in them securing 14% of the vote. Further, the Lib-Dems performed strongly in the general election, gaining 12% of the vote. This meant that four parties polled above 10%, weakening the two-party dominance. This has strongly continued since Labour's landslide. This creates the question of why has this fragmentation occurred?

This research paper seeks to provide early insights that can indicate answers to this complex question. It does this by analysing polling data in the last parliament to identify trends that can explain the decline in support for the Conservative Party and the rise in support for Labour and Reform.

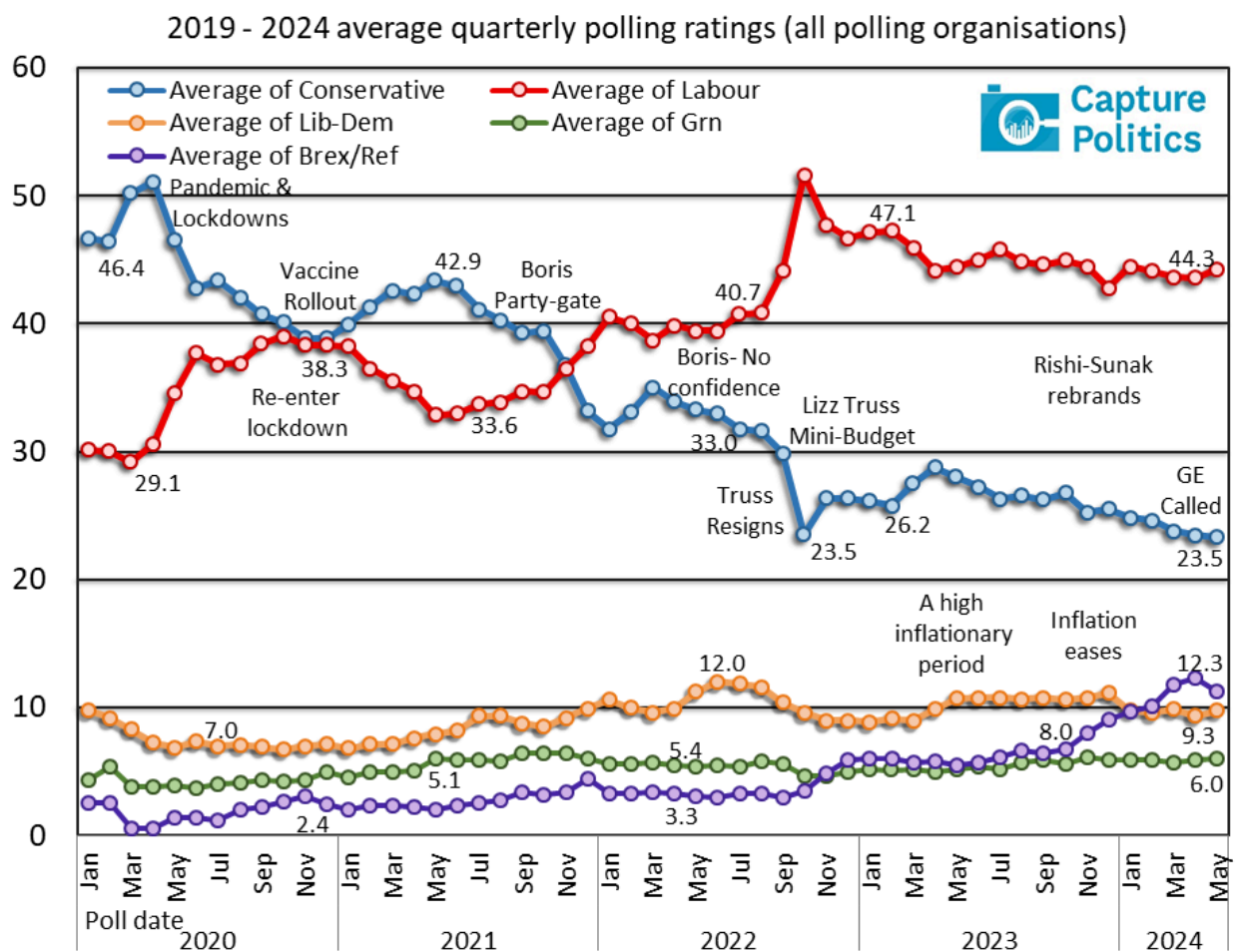


Figure 1: Average monthly polling ratings across the 2019-‘24 parliament. Source: Mark Pack’s Polling database.

Specifically, it investigates how the realignment had weakened by the mid-point of 2022, meaning fixed patterns of party competition had changed. This created the possibility for a large proportion of the electorate to splinter across multiple parties, evidenced by the collapse of the 2019 Conservative vote fragmenting between

Labour, Reform and other smaller parties. According to this paper’s polling analysis, the breakdown of realignment patterns became possible due to a number of factors. Firstly, this includes external shocks: a pandemic, an inflationary crisis and a change in the voters’ priorities. Secondly, it covers internal shocks. These are events that altered the perceptions of party leaders and overall party competence, such as partygate.

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James Prentice - Research paper - Explaining Fragmentation in British politics (Polling analysis).

How the Electorate Fragmented

Different parties have been affected in contrasting ways by these factors. Some have gained whilst others have declined. The clearest decline came from the Conservative Party. With this party holding over 40% of the vote at the start of the 2019-'24 parliament, a steep decline in this party's fortunes was required for the party system to fragment. A large proportion of the Conservative 2019 vote came from older and lower-qualified voters, who came from a broad mixture of class backgrounds. A clear majority of this base had voted to Leave the EU.

Across the last parliament, the new coalition formed by Johnson weakened. Across 2020, the Conservative Party had secured 65% of all individuals who had voted to leave the EU. Yet, a month before the general election, they could only rely on 35% of this base. Interestingly, their Remain voter support only declined by 6%p (20%-14%) in the same period. A similar story occurred with older voters. The Tories had acquired 65% of those over the age of 60 in 2019, but could only secure just under 30% of this group in May 2024. Younger 2019 supporters had also fled the party, with there being an 11%p decrease in this group's support in the same period (18%-7%). The Conservatives also lost support from lower-qualified individuals. In 2020, the party could consistently rely on 43% of this group's vote. Yet, in the month the election was called, this had declined to 28%. This allowed Labour to secure 16% more of this vote by the end of the parliamentary cycle, making Labour less reliant on highly educated voters. There had also been a 13%p decline in support the Conservatives could secure from those with higher-than-average qualifications. The party had also lost support from its new working-class base, with 25% fewer from C2DE backgrounds indicating they would vote Tory at the end of the parliamentary cycle than at the start.

Figure 1 shows that the decline in these groups' support came in four waves. Firstly, a noticeable dip in ratings occurred as inflation rose after Covid-restrictions were lifted. The second stage of this decline occurred around the point of party-gate, where senior government figures had been revealed as breaking nationally imposed lockdown rules. The next dip occurred with the votes of no confidence in Johnson's position as Prime Minister and his eventual resignation. The last stage occurred after Truss' failed mini-budget (with the Tories' ratings not recovering even after Sunak's many rebrands). This would indicate that these events played a part in the fragmentation of the Conservative Party vote.

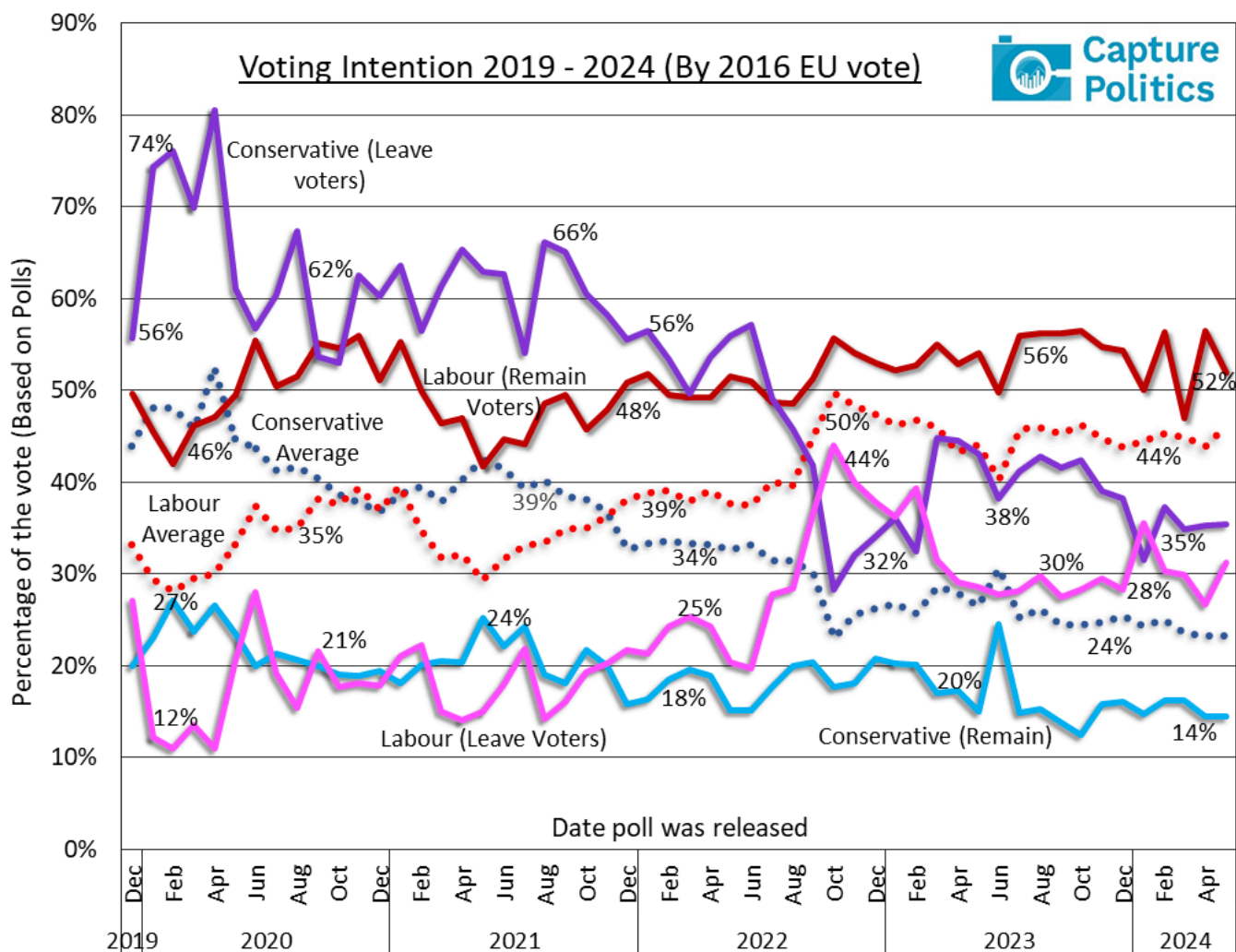


Figure 2: Voting intention by EU referendum vote, 2019 – '24: Sources: DeltaPoll, YouGov, Survation and Opinium.

Initially, the main beneficiary of this collapse of the realignment was the Labour Party. From 2019 to early 2023, Labour had secured 12% of the 2019 Tory vote. Their gains in support first occurred as the country exited lockdowns and Labour began to stress how they had changed and re-emerged as a centre-ground party. Figures 1 and 2 demonstrate that Labour made further gains after an inflationary period, party-gate, Johnson's resignation and Truss' failed mini-budget, again indicating the importance of these events. However, after this point, Labour's gains stopped, with the party having only secured 12% of the Conservative 2019 vote at the point the election was called, see Figure 3. The two core factors behind this were a large proportion of undecided Conservative voters mostly sticking with the Tories and the rise of Reform.

Reform had been challenging the Conservatives during the first phase of the parliament, but they had struggled to secure more than 8% of the Conservative 2019 vote share, their most likely support base. Yet, towards the end of the last parliament, Reform steadily made its breakthrough, with them securing 23% of the 2019 vote at the point the election was called. Some of these gains will have been acquired from undecided voters. However, according to Figure 2, a noticeable part of these gains will have been secured directly from 2019 Tory voters who had stayed loyal through tough times.

As Reform gained most amongst Leave voters, this could partially explain Labour's inability to secure more support in the latter stage of the parliament. Throughout the parliament, Labour's gains amongst Remain voters were static, with them roughly having 50% of all Remainers support throughout the parliament. In contrast,

they gained considerably with Leave voters (16%p across the last parliament, see Figure 2). However, in late 2022, Labour had secured 44% of the Leave vote, but this dropped to 31% by the time the election was announced. Therefore, as Reform rose, they may have prevented Labour from securing a strong enough Leave base to further increase their vote share. Additionally, Reform may have even taken Leave voters from Labour (some of whom will have voted Tory in 2019). This upward trend in Reform's support from mostly Leave voters occurred as the inflation stabilised and other issues, like immigration and small-boat crossings, became more prominent. This would indicate that Reform may have capitalised on these events whilst the two main parties mostly suffered from them.

In terms of other smaller parties, the Lib-Dems and the Greens had also secured 5% of the Tory 2019 vote between them. Whilst these gains were relatively small, as these swings were concentrated, this likely would have been sufficient for these parties to take seats off the Conservatives.

Crucially, this all highlights that the Conservative collapse did not flow one way and that different groups of voters will have flowed towards a party for contrasting reasons. For instance, one reason Labour was unable to gain more voters from the Tories may have been that those who backed Reform instead may have been a different group of voters with contrasting priorities and perceptions.

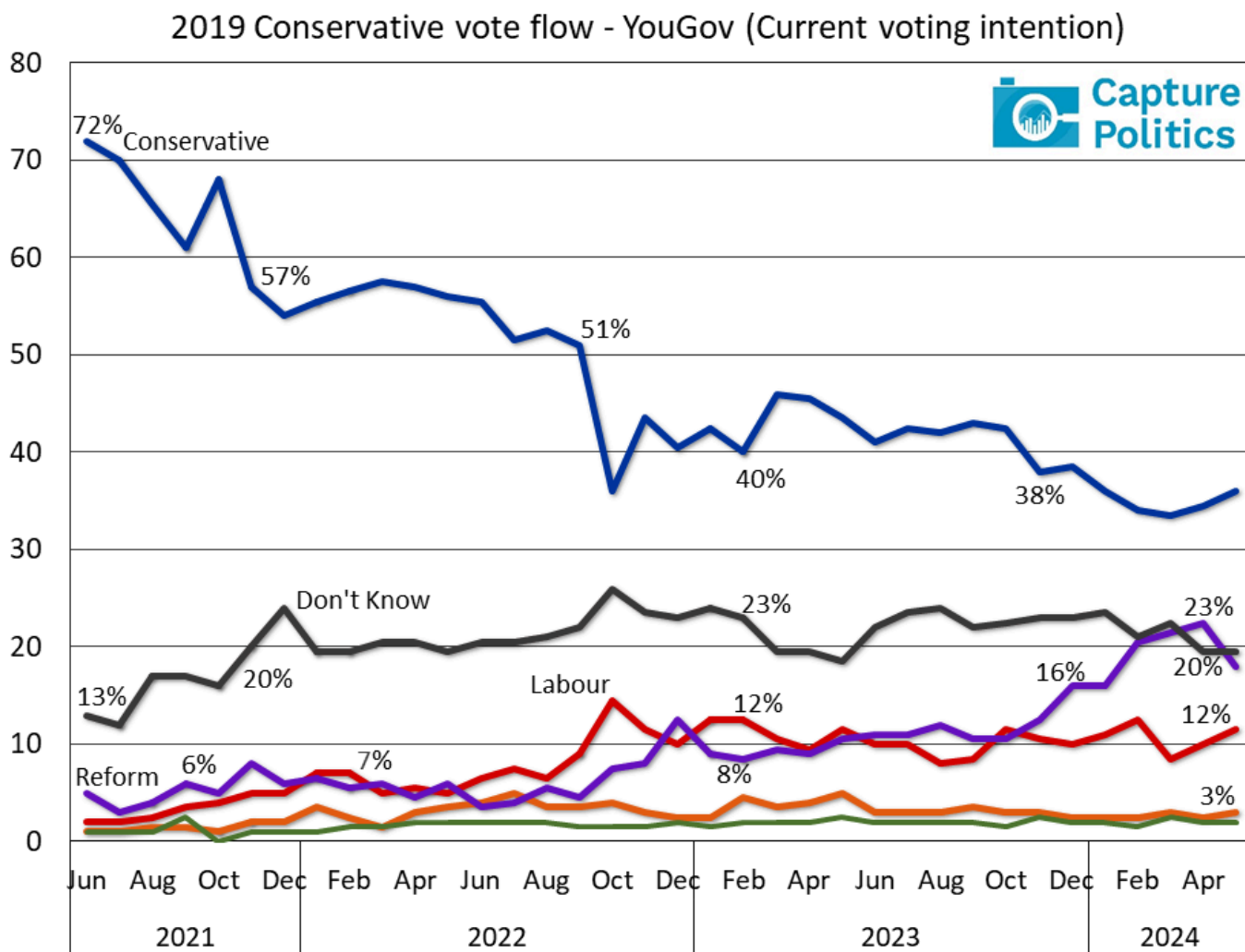


Figure 3: The collapse of the Conservative vote and where it flowed across the 2019-'24 parliament. Source: Polling organisations (YouGov, Survation, Redfield Wilton and Opinium.)

While Labour was a large beneficiary of the Conservative collapse, this hides how their 2019 base also splintered. According to YouGov, the month before the general election campaign was held, 8% of them had already switched to the Greens. Additionally, a further 3% had diverted to the Lib-Dems, with another 2% going to Reform. Also, 10% of Labour's vote had not decided how it would vote until late in the election campaign. Whilst Labour would regain some support, with hindsight, it

is clear that a proportion of this group went to the Greens and Independents, with these groups gaining seats from Labour. This loss of support to smaller parties mostly came from younger voters. In 2019, Labour had secured 58% of the vote amongst younger voters (below the age of 35). By mid-2023, Labour had secured 63% of the vote. Yet, by May 2024, it would only have 56% of this group's support, 2%p lower than what they had started with. In late 2023, Labour suffered a large dip in support amongst this grouping, possibly due to the party's response to the ongoing conflict in Gaza. Although Labour recovered some support in the spring of 2024 amongst more highly educated voters, it had lost a noticeable proportion of younger voters to left-wing alternatives.

Interestingly, this deeper analysis of electoral trends across the last parliament has revealed how the electorate fragmented across multiple parties in different directions. As outlined earlier, there are multiple competing explanations behind this trend. The rest of this paper explores the potential factors that may be causing this fragmentation.

External shocks – changing priorities:

At the start of the last parliament, the process of leaving the EU was seen as the most important issue facing the country. This issue being so prominent was very important as it allowed a large coalition of voters to be placed into two camps. In 2017, these coalitions were roughly evenly split between Labour and Conservative. This partly arose because Labour had managed to convince enough Leave voters that they would honour the referendum result and implement Brexit. Yet, by December 2019, Leave voters had grown

increasingly frustrated by Labour's vague non-committal position on Brexit and switched to the Tories once Johnson promised to "get Brexit done". With a large coalition of voters who agreed it was essential to implement Brexit, the Tories found themselves with a large majority for the first time since the 1980s. With so many voters fixated on ending the Brexit debate and a clear majority favouring the Tories to implement Brexit, it seemed like the Conservatives would continue to dominate British politics.

Yet, with the emergence of a global pandemic and all countries being forced into lockdown, Brexit quickly faded into obscurity, see Figure 4. By the summer of 2020, 74% of the public believed health to be the most important issue facing the nation. Whilst Brexit briefly made a comeback in late 2020, once people realised that multiple lockdowns would become the norm Brexit again declined in prominence. Indeed, by the end of the parliament, it was considered to be a big issue by only 14% of voters, a 58% decline compared to December 2019. One core reason for this was that the pandemic ensured that health remained a prominent issue for voters. During the pandemic and lockdowns, the NHS faced severe pressures, and people understandably became concerned about the service's ability to care for them if their health deteriorated. As stories cycled on the news about Covid-19 hospitalising many people, this will have only heightened health anxieties.

Post-pandemic, the NHS likely remained in the voters' minds because of the long-term effects the pandemic had on the service. Firstly, Covid-19 left

many unanticipated long-term health conditions, ensuring the already pressurised service would continue to face strain on essential health services. Additionally, the inability to conduct most treatments during the pandemic caused waiting times to spike. Along with this, some staff who had been exposed to the virus will have struggled with their own health battles, causing some to leave the service. All these factors will have made it harder for the NHS to address health needs, possibly causing concerns around the service to linger in the voters' minds. This could explain why polling showed the NHS to be considered the most important issue by an average of 47% of the electorate throughout the last parliament.

Voters stated most important issue (All voters)

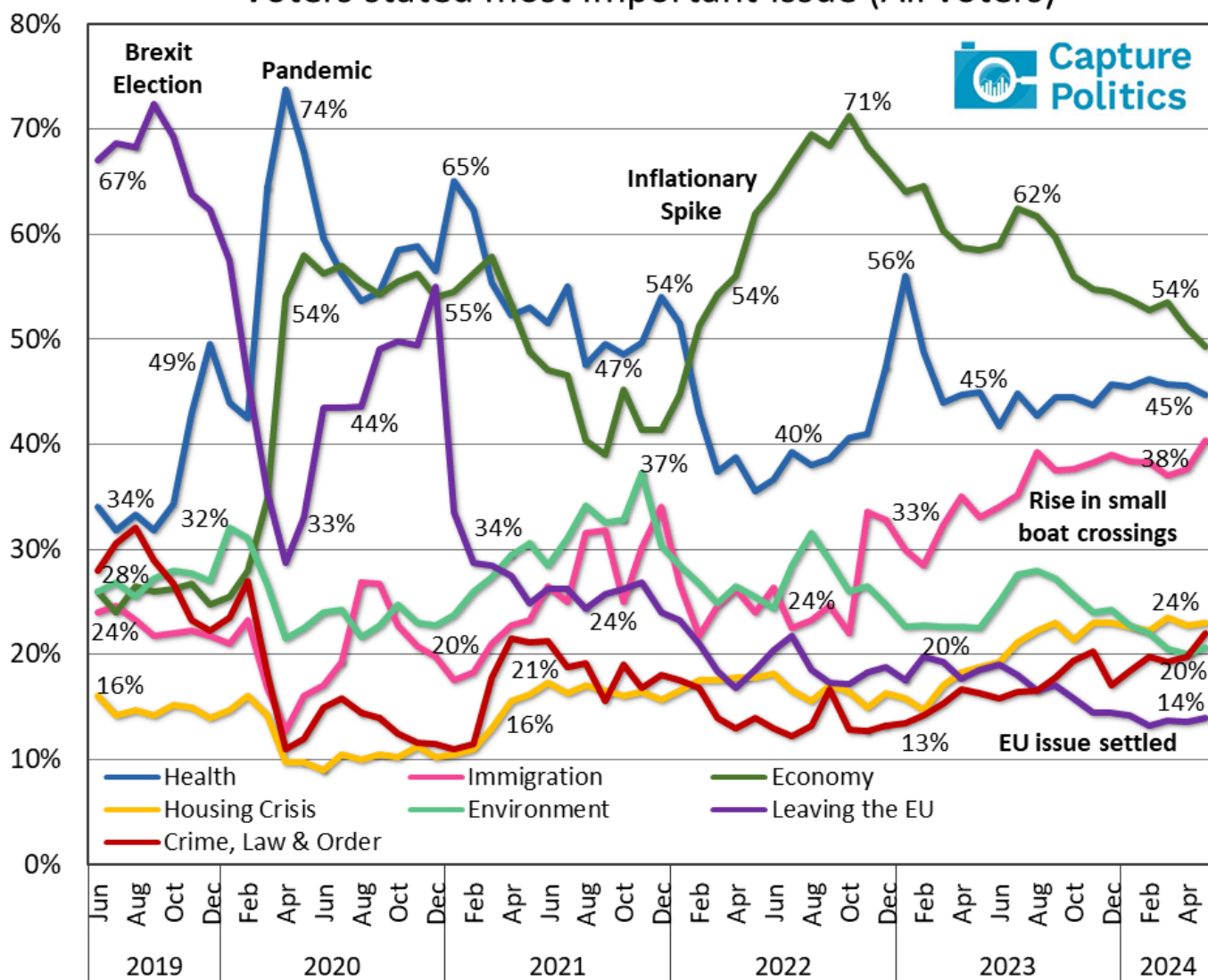


Figure 4: The most important issue facing the UK, 2019-'24 (All voters). Source: Polling organisation YouGov.

Another core reason for Brexit becoming less prominent in the voters' minds was the rise of economic concerns. Initially, the pandemic caused much economic uncertainty as people were forced to stay at home and were unsure about how they would be able to gain an income. At this point, 55% of the electorate felt the economy to be the most pressing priority. After

furlough secured an income for many people, and businesses looked to be able to survive with government support, people were still concerned about the economic impact of lockdowns. Due to this, economic thoughts were still prominent during lockdown times. Yet, when lockdowns were lifted in 2021, concerns over the economy caused the issue to be seen as the biggest issue by less than 40% of voters for the first time since Covid-19 struck. However, the aftermath of the pandemic led to an inflationary spike due to global supply chains not being able to cope with rising demand that came from people looking to spend post-lockdown. This inflationary spike was then compounded by Russia's invasion of Ukraine, something that led to global supply chains being further restricted and a rise in energy prices. This spike in global inflation led to a 31%p increase in the proportion of people saying the economy was the most pressing issue in 2022. IPSOS MORI polling confirms the importance of inflation, where in August 2022, it was seen as the biggest issue for 54% of voters. By the end of 2022, this meant 71% stated economic matters to be the ones most prominent in their minds. Even when the inflationary period abated as the election approached, the economy was the most common concern of the voters, with 55% saying it was the most prominent issue.

The reason why these issues are becoming more salient matters is that they coincided with people's perceptions of how credible they thought the Tories were to deal with their biggest concerns. In 2019, the Tories could command

a majority partly because 40% stated they felt the Conservatives were the most competent on Brexit (+31%p compared to their nearest rivals, Labour). As so many people cared about this issue, this gave the Conservatives the approval of voters they needed to gain a majority. However, as other issues replaced Brexit, this meant the Conservatives were no longer seen as the most competent on the issues voters prioritised.

Pandemic & Handling the NHS:

This was the case with managing the NHS and addressing growing health concerns. The Conservatives always struggle against Labour when it comes to the NHS. Even at the peak of their popularity over Labour in 2019, they were 5%p behind Labour in being seen as the best party to run the NHS. In December 2019, 26% thought the Tories were best placed to manage the health service, but 31% preferred Labour. Interestingly, during the early phases of the pandemic, the Tories closed this gap to almost tie with Labour. However, as lockdowns continued and the strains on the NHS grew, the gap between Labour and the Tories grew quickly, see Figure 5. By the end of 2021, there was a 16%p gap between Labour and the Tories when people were asked who was best to manage NHS services. At the point of the next election, with the growing backlog problem post-lockdown, this gap had grown to 28%p. By this point, only 10% thought the Conservatives to be the best-placed party to manage this vital issue, whereas 38% backed Labour. The Conservatives particularly lost amongst Leave supporters. At the start of

this parliament, 44% of Leave voters perceived the Tories as best to handle issues relating to health. Yet, this declined to 14% by April 2024, a 30%p decline.

In contrast, Labour gained from older voters. For instance, only 31% of the 50-64 cohort thought Labour was the most competent on health, but this had increased to 43% by the election. Labour also secured more Leave voters' support, with 25% of these voters feeling Labour was the best party to handle the NHS by the end of the parliament, an 8%p increase from 2019. Further, 24% of 2019 Tory voters also felt this way by May 2024, an 18%p rise from 2019.

As Labour gained from older Leave voters who backed the Tories in 2019, it is possible that this change in perceptions to competently manage a key issue assisted Labour. Therefore, it can be said that the challenges the pandemic brought to the NHS coincided with the decline in the Tories' perceived competence and poll ratings. Consequently, this may have, in part, caused the splintering of the Conservative vote and could be argued to partly explain the fragmentation of the British political system in the last parliament.

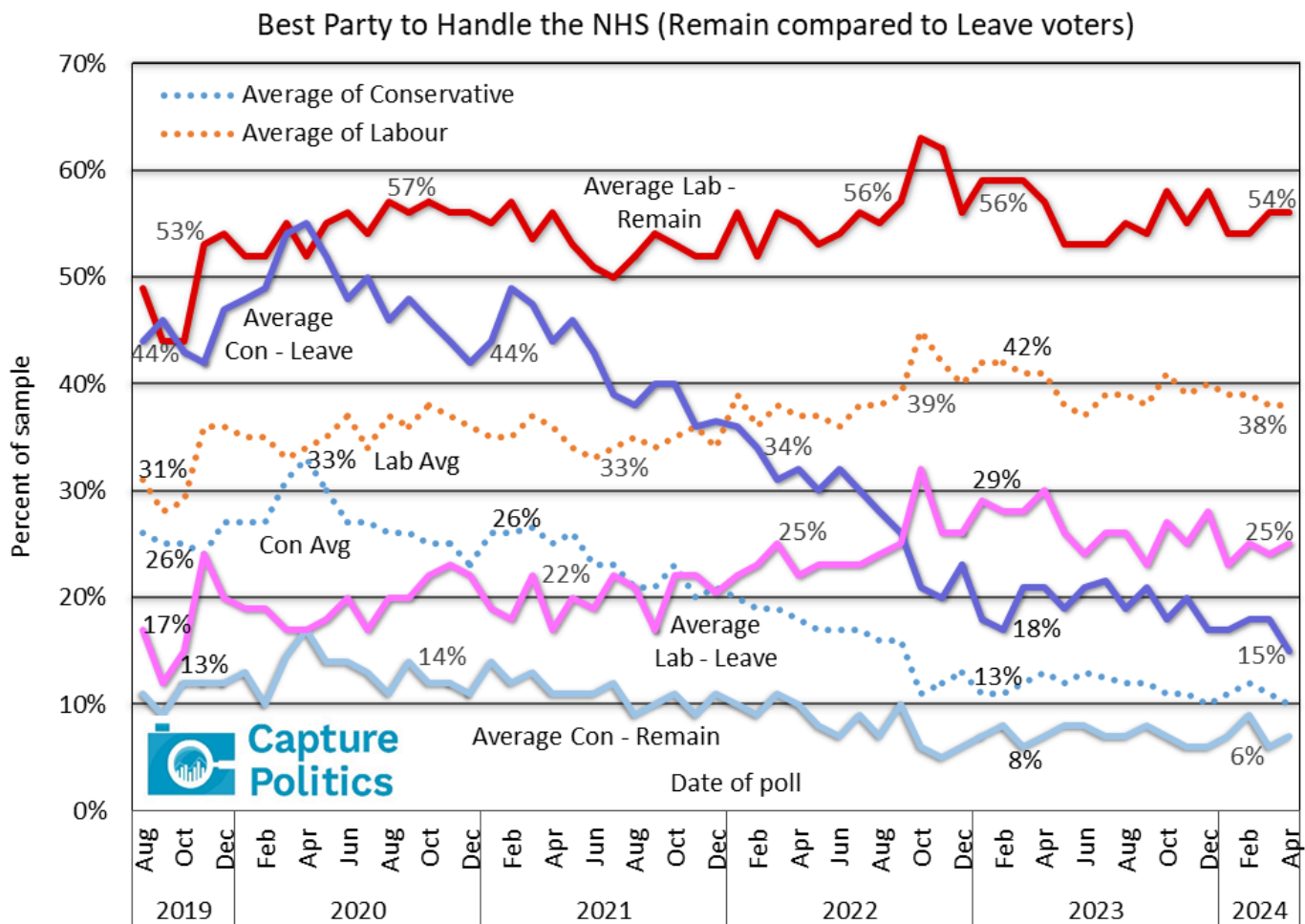


Figure 5: The best party to handle the NHS by EU referendum vote, 2019-'24. Source: YouGov.

Inflationary crisis & Managing the economy:

As the economy became more prominent in the voters' minds, this meant the public started to focus on a different ideological dimension to the Brexit divide, that of the traditional left/right divide. This means that people in the Brexit camp may have been united on cultural issues but were not necessarily united on economic ones. The polls illustrate this well. At the start of the last parliament, only 33% of all voters thought the Tories were the best placed to

handle the economy, a far cry from the 74% that thought they were the most able party to handle Brexit. Initially, the Tories increased their lead over Labour, possibly due to a rally around the flag effect during the first lockdown in 2020. Yet, after the UK exited its final lockdown and the inflationary spike occurred, the Tories' lead quickly declined. Further to this, the difficult decisions required to manage the inflationary spike, such as tax rises and spending cuts, likely only dented their economic approval ratings. Figure 6 demonstrates that by the summer of 2022, only 25% of the electorate believed they were best placed to manage the economy, an 8%p decline since 2019. With Truss' failed mini-budget leading to an interest rate spike, this would have worsened the cost of living for many. Additionally, it required future tax rises and government cuts to pay for the mistake. As a result, it is not surprising that such events coincided with further declines in the Tories' economic competence ratings. In the latter stages of the parliament and despite Sunak steadying the ship, only 20% of the electorate believed the Tories were the most able party to look after the economy. This reflected a 13%p reduction since 2019. The Tories particularly declined among the new electoral base they had secured. From December 2019 to May 2024, the party witnessed a 22%p decline in Leave voters believing the Tories to be the most economically competent. There was also a 20%p decline amongst older voters (all those over 50). Indeed, amongst all those who voted Tory in 2019, there was a 24%p decline.

Oppositely, Labour gained economic credibility as the parliament developed and had overtaken the Tories by October 2022. In 2019, only 15% of the electorate believed Labour to be the most economically competent. Yet, by the time the election was called, 27% thought this to be the case. Interestingly, Labour gained amongst the groups they struggled to secure support from in 2019. 9% more of the electorate who had voted Tory in 2019 now perceived Labour to be the most economically credible. There was an 11%p increase among those who had voted to Leave and a 14% increase amongst all those over the age of 50. Vitally, Labour completely reversed perceptions amongst those in working-class occupational groupings. At the point of the last general election, the Conservatives were seen as the most able party to manage the economy by 29% C2DE (working class) voters, see image 6. Labour only had 15% of this grouping feeling this way, giving the Tories a 14%p lead. Yet, as the parliament progressed, Labour developed a 7%p lead, with them having 24% of this grouping believing they were the best to manage the economy at the end of the parliamentary cycle.

Again, this would indicate that events that forced Brexit to be replaced by new issues assisted in fragmenting the Conservative vote due to wider disagreement over how to best handle these issues.

Small boats and tackling migration:

Immigration had not been one of the biggest issues in the early stages of the parliament, with it often being outside the electorate's top four concerns. In the first

few months of 2023, the issue was seen as the biggest one facing the country by 29% of the electorate. Yet, this had grown to 38% by the end of the year and 41% by Polling Day. Initially, this issue may have decreased in prominence due to Brexit, the Pandemic and the inflationary crisis taking prominence. Yet, as these problems were abated, people may have started to focus on the immigration issue again due to increased migrant flows. Further, increased boat crossings in the channel may have also helped bring this issue into greater prominence. This issue rising in prominence did not inevitably have to damage the Conservatives due to them traditionally beating Labour on the issue. Indeed, at the start of the parliament, the Tories were seen as the best to manage this issue by 26% of the electorate, whilst only 17% felt this way about Labour.

Yet, as the Conservatives were unable to reduce migration flows and stop the small-boat crossings, they began to be seen as the most credible party on this issue by fewer voters. Indeed, only 15% saw them as the most credible party on the migration issue by the end of the parliament, an 11%p decrease. Yet, Labour does not appear to be a large beneficiary of this collapse. Whilst they did gain an additional 4% of the electorate across the parliament, this only meant that 21% of all voters felt that they were best to manage this issue. Interestingly, Labour gained very little of this increase from Leave voters, with there being roughly the same proportion of Leave voters feeling Labour could be trusted on immigration throughout the parliament. Most of Labour's gains came from Remain voters, see Figure 7. This would indicate that Labour may have struggled on this issue amongst some Leave voters.

Instead, a larger proportion of the electorate stated that another party was best placed to handle this issue. At the start of the parliament, only 5% said they had another party outside the listed parties in mind. Yet, by the month of the 2024 election, this had risen

to 13%. This most likely came from voters who felt the newly formed Reform UK Party could be trusted to manage the issue due to their tough position on the matter. Further, twice the number of voters felt no party could be trusted to manage the issue, with 20% feeling this way by the end of the parliament. These feelings tended to increase at the same time Reform's polling ratings increased. This indicates that neither of the two main parties were trusted by a specific proportion of the electorate to manage migration, something that may have helped the rise of Reform.

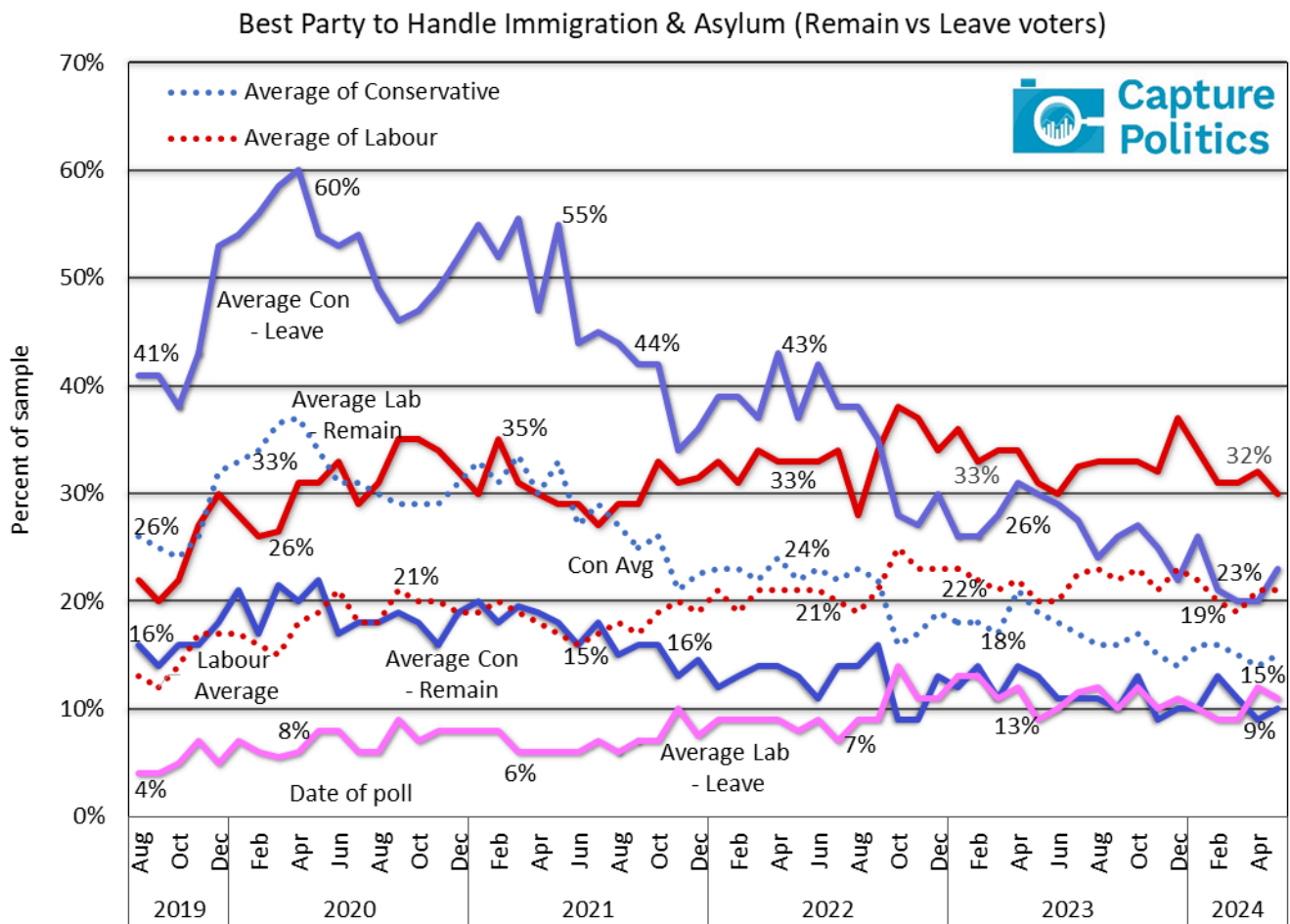


Figure 7: The best party to handle immigration by EU referendum vote, 2019-'24. Source: YouGov.

Internal shocks – changing perceptions:

So far, the analysis has assumed that only external shocks changed the direction of the opinion polls. This ignores the importance of events that occur within the political system, such as internal party politics and exchanges between rival parties. Specifically, Johnson being implicated in partygate, the Tories having several no-confidence votes, and Truss being forced to step down after only a month in office may have also shifted the polls. Such events may have weakened the public's confidence in the Conservative Party's ability to govern and, from this, reduced their standings in the polls. Alternatively, actions the Labour Party took in changing their leader and shifting their party to the centre may have helped them to gain voters from the Conservatives after their leadership problems materialised.

Shifting leadership perceptions:

The voters' perception of the quality of leadership that both parties had to offer altered dramatically. Figure 8 shows that at the start of the parliament, Johnson had a clear lead over Corbyn in terms of who would make the best Prime Minister, 26%p. As Starmer took over the Party in April 2020, he quickly began to close this gap. With Johnson managing a long lockdown and the public growing tired of restrictions, this gap quickly closed to 0. In late 2020, the Prime Minister gained a boost due to the vaccine rollout. Yet, by the end of 2021, this bounce had very much ended, and by early 2022, Starmer had a clear lead over Johnson. This may have occurred because the Prime Minister had been forced into

another lockdown over Christmas despite telling the public they would be able to spend the holidays with loved ones. Starmer's lead on being seen as the best party leader would increase later in 2022 after the party-gate story broke and Johnson faced motions of no confidence. Truss' failed mini-budget further dented perceptions of Conservative Party leadership, possibly due to the budget unravelling very quickly and high-ranking resignations following shortly afterwards. Starmer's ratings as being seen as the best leader to perform in the role of Prime Minister only dipped slightly during the handling of the Gaza crisis. Yet, this dip had been reversed by early 2024, and Labour kept a consistent lead of 14% in being seen to have the most capable leader. Therefore, Labour had turned a -26%p deficit to a 14%p lead, a swing of 30%p over the course of the parliament. Clearly, the perceptions of the party leader's ability to run a government had altered considerably.

The Conservatives had lost heavily amongst Leave voters. At the beginning of Starmer's tenure as Labour leader, 69% of all voters perceived the Tories to have the most capable leader. Yet, only 15% of Leave voters viewed the new Labour leader as most credible, a gap of 44%. This gap had closed to only 10%p by May 2024. This gap was mainly closed due to Leave voters saying that neither of the two main party leaders was the best, indicating that some Leave voters may have believed another leader, like Farage, to be most able to carry out the role of Prime Minister. Labour particularly gained amongst those over the age of 55. Here, Labour had a deficit of 27%p but by the time the election was announced,

they had a 1%p lead. Amongst those between the ages of 55 and 64, they had a lead of 17%p. Further, among those with lower qualifications (level 2 and below), Johnson had a 19%p lead. However, by polling day, Starmer had a 10% lead over Sunak.

Interestingly, this shows that the voters who split the Conservative Party's 2019 base had reversed their perceptions of the two main party leaders. As the declines in confidence in Conservative Party leaders occurred simultaneously with the decline in their poll ratings, this would indicate that perceived leadership failings could have altered the polls. Additionally, as Labour's increases in confidence occurred in conjunction with increases in their poll ratings, this reinforces the argument that changes in the party leader's fortunes had an impact on the polls.

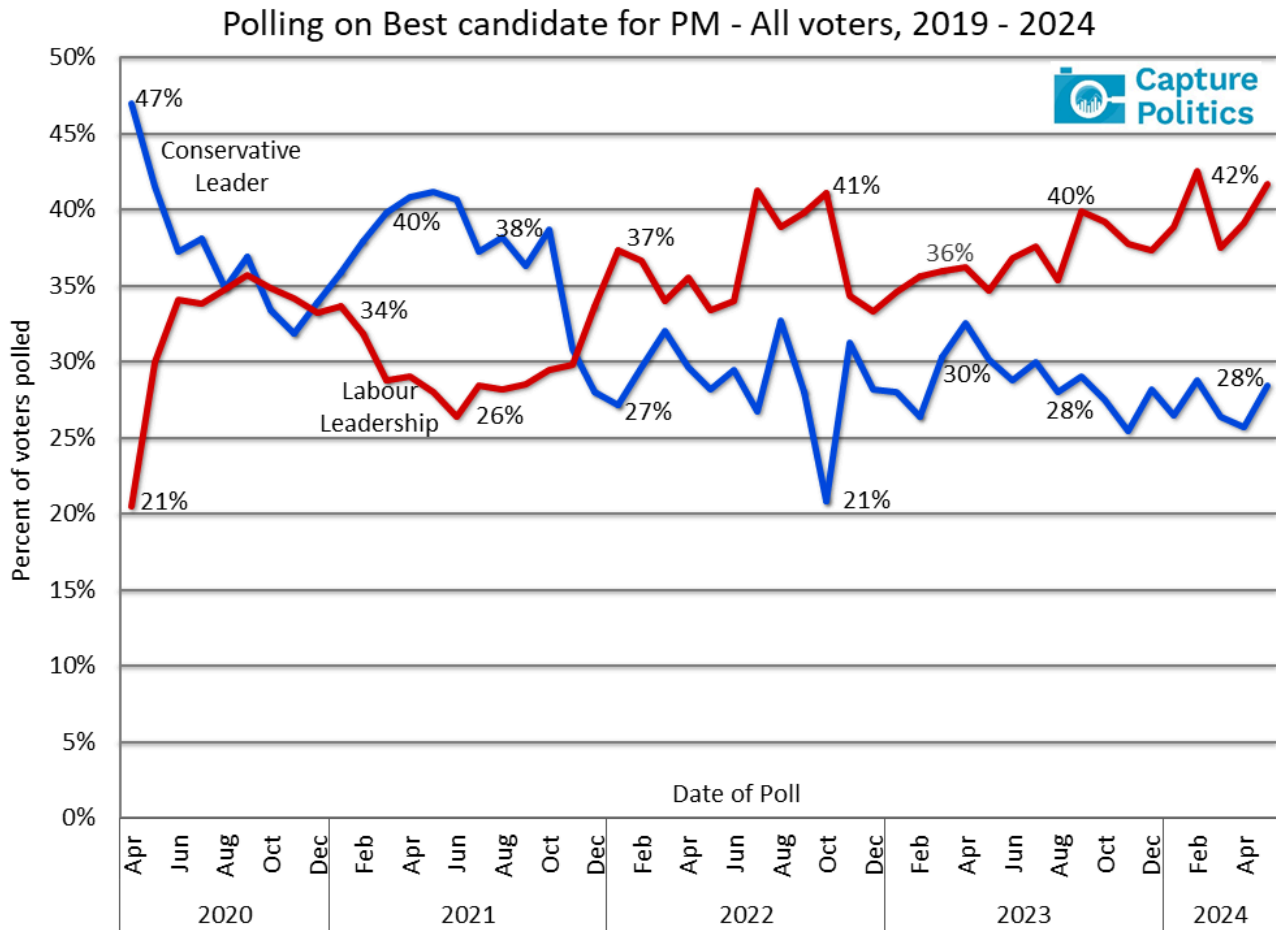


Figure 8: The best party to handle immigration by EU referendum vote, 2019-'24. Source: YouGov.

Altering perceptions of the parties:

These internal party events may have gone further than altering leadership perceptions and may have affected the public’s perceptions of the two main parties. At the beginning of the parliament, the Conservative Party was perceived slightly more favourably than Labour, with them enjoying a 13-point lead over Labour in net favourability. Yet, by the summer of 2020, Labour had secured a 12-point lead in net favourability, see Figure 9. This would indicate that the

government's decision to enter lockdowns later (which likely prolonged the lockdowns) may have dented the public's belief that the Tories could perform whilst in government. In contrast, Labour under new leadership offering a different COVID-19 strategy, such as entering lockdowns earlier, may have caused the public to have renewed faith in the party's ability to govern. The gap between the Tories and Labour would widen in the latter half of 2021. The Tories would drop to -40 whilst Labour climbed to -20, producing a 20-point lead. Here, the shock of partygate, Johnson's handling of the crisis and motions of no confidence in his leadership may have caused the public to question the credibility of the entire Conservative Party. Further, the inflationary spike in 2022 coincided with the party consistently staying around the -40 mark for many months. Following this, the party declined further (to -48) at the same point Truss' mini-budget failed, the chancellor was fired, and the Prime Minister later resigned. Despite Sunak's many rebrands after he took over the leadership, the Tories' net approval rating stagnated around -50. In contrast, by mostly avoiding scandals and holding the government to account for failings, Labour steadily climbed and ended the parliament with a net approval rating of -5.

The Conservative Party's approval rating declined most sharply amongst the groups they needed to retain to keep their 2019 base intact. Most notably, from 2019-'24, the Tories' approval ratings from leave voters went from +44 to -28, a 72-point swing.

Again, this would indicate that internal party chaos had caused a crisis of confidence in the party's ability to govern competently. In fact, looking deeper into the polling data, it can be said that the Conservatives were not really trusted to manage any key policy area. Interestingly, by May 2024, only 18% thought they were best on taxation (lower than Labour). Further, 7% perceived the Tories as being able to handle the European question and even fewer trusted the Conservatives most to manage matters on the environment and housing. Also, from earlier analysis, we know they were not trusted on the economy, the NHS or immigration. This would indicate that internal troubles that led to several scandals, high-ranking resignations and high-profile mistakes may have resulted in poor approval ratings for the Tories. This is something that may have lowered the party's standings in the polls.

Net Party favourability score by Remain & Leave voters, Polls 2019 - '24

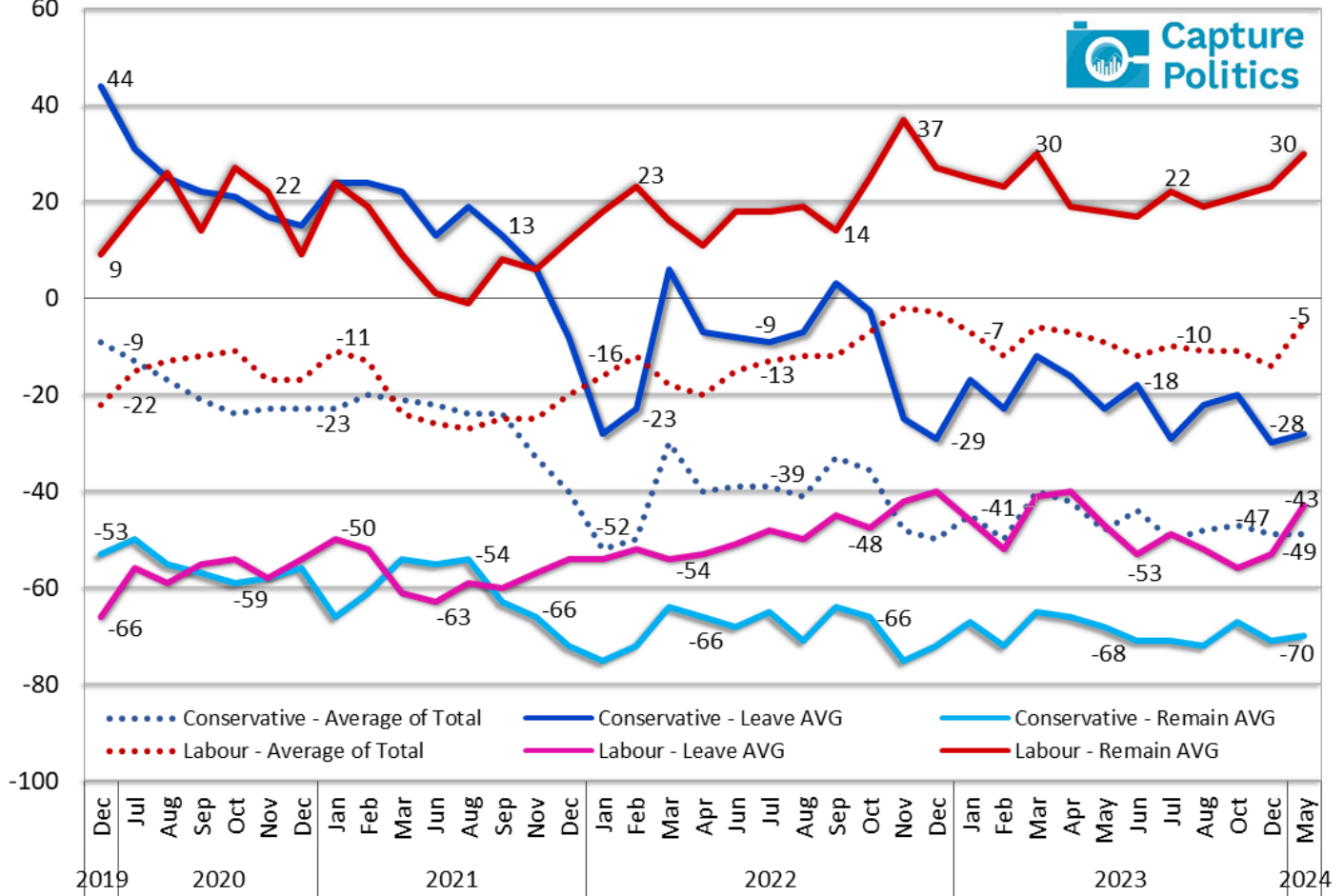


Figure 9: Net Party Favourability score for Labour and Conservative, 2019-'24 by EU referendum vote. Source: YouGov and Survation.

What had the largest impact?

Given that so many different internal and external events in our political system could have shifted the polls, this does raise the question of which ones were the most decisive? To determine this, the paper constructs a linear regression model. It does this by using a monthly average of each party's polling rating as the dependent variable. It then uses the monthly average of various measures

that may have shifted the polls as independent variables. This includes: party favourability ratings, leadership ratings, changes in voters' issue priorities and the extent parties were trusted to handle key issues. It also includes changes in inflation and alterations to key cost of living payments (such as mortgage rates). This model produced a high adjusted R-squared output (0.97), indicating that these findings can explain a large proportion of the variation in the parties' vote share. The results of this model are summarised in Figure 10.

A reversal in economic credibility:

Changes in economic credibility produced the largest change. When Labour's lead over the Conservative Party on being seen as the best party to manage the economy was greatest, Labour gained 10% in the polls, and the Tories lost 8%. Therefore, this produced an 18% swing in Labour's favour. At the end of the parliament, Labour's lead over the Tories was 7%p. This is something that the model estimates to have produced a 7% gain for Labour and a 5% decline in the polls for the Tories, a 12% net gain. This shows that Labour's ability to regain 2019 Tory voters' confidence in economic management helped them to shift the polls in their favour. It also highlights how economic shocks like inflation and mismanagement of the economy from Truss' mini-budget may have also helped Labour dismantle the Tories' 2019 base.

The cost of living:

Changes in the cost of living also produced a large change in the polls. Using the monthly CPI inflation rate, the model found that the average inflation rate of 4.8% decreased the Conservative vote share by 2%. In contrast, this average increased the Labour vote share by 2%. When inflation was very high, around 10%, the models estimated Labour gained 7% over the Conservative Party. Further, the increases in mortgage variable rates at their highest produced a net gain of 5% for Labour. On average, it produced a 2% swing. This would indicate that external shocks that increased inflation, such as the war in Ukraine and supply chain problems post-lockdown, did fragment the 2019 Conservative vote. It particularly highlights how new concerns, such as economic ones, caused people to reassess their allegiances. This was particularly the case when part of the Tories' 2019 base was negatively affected by rising inflation and mortgage rates.

Altered political perceptions:

Altering perceptions of the party leaders produced the net greatest change in the polls. Labour being seen to have the best leader for the role of Prime Minister also produced a significant gain for Labour. At the end of the parliament, 41% of the electorate felt Labour had the leader who was most capable of running the government. According to the linear model, this increased Labour's standings in the polls by 3%, whilst the Tories witnessed a decrease of 4%, a net gain of 7%p. Additionally, Labour's improved net favourability score of -7 helped the party increase by another 1% in the polls.

Interestingly, the Conservative Party's overall favourability score no longer reduced Labour's vote share. All this indicates that changes in leadership and internal political failings within the Conservative Party helped Labour to gain. Therefore, this indicates that scandals and incompetence surrounding Tory leaders assisted in causing the fragmentation of its strong 2019 base.

A renewed focus on health:

A renewed focus on health produced a moderate but significant change in the polls. Across the course of the last parliament, health was on average seen as the biggest issue by roughly 50% of the electorate. According to the linear model, when someone believed health to be the biggest issue facing the country, this allowed Labour to secure an extra 2.5 points in the polls. This average had a decreasing effect on the Tories' vote share, with it on average declining by 2%, giving Labour a 4.5% gain. In comparison, when Brexit was thought of as the biggest issue facing the country, this had no significant effect on the Conservative vote share, with it likely helping Labour to slightly gain. This would indicate that a shift away from Brexit towards health and economic policy matters allowed the Conservative 2019 vote to separate, with Labour being the main beneficiary.

Immigration didn't help either party:

As the immigration issue rose in saliency and Labour overtook the Conservatives in being seen as the most able party to manage migration flows, the

Conservative Party lost support. At the end of the parliament, Labour had a 7% lead over the Conservatives in terms of which party was seen as most able to manage the immigration issue. This produced a 5% decline in the Tories' vote share. Interestingly, there was no significant effect on Labour's poll ratings. This would indicate that Labour did not gain. In part, this may be because Reform was the party that primarily gained. When constructing a similar model for Reform, immigration becoming the biggest issue for more voters was the second most influential factor that increased their poll ratings (after inflation). This factor increased the Reform vote by 4%, a significant increase for a party that only secured 12% in the election and started from a low base. In contrast, the biggest increase for the Greens derived from voters highly prioritising the environment, giving them a boost in the polls of 1.5%. This would indicate that smaller parties gained when other issues outside that of the economy, the NHS and Brexit became prominent in more voters' minds.

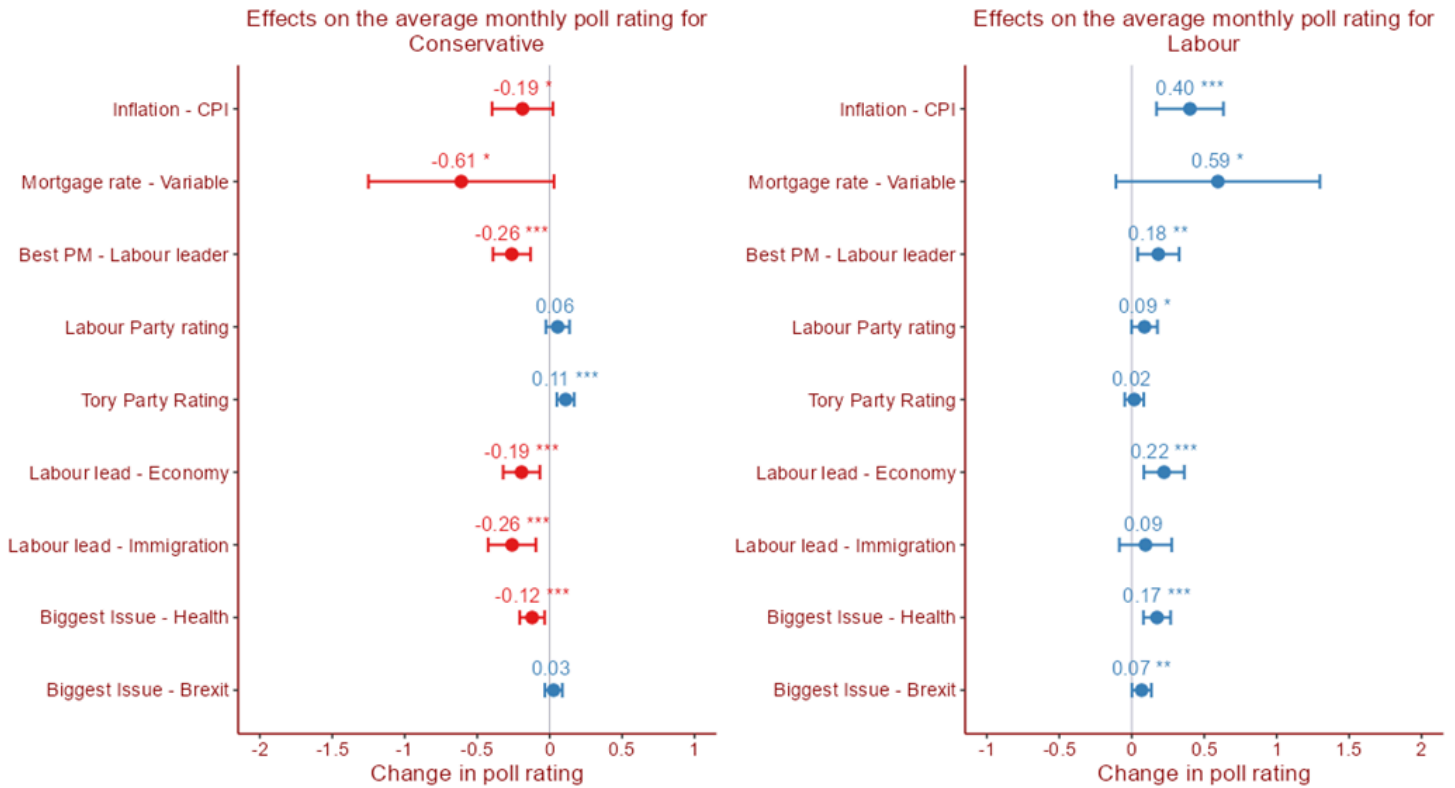


Figure 10: The results of a linear model estimating various factors’ effect on monthly average poll ratings for both the main parties - 2019-’24. Source: Polling organisations registered with the British Polling Council and economic data from the Bank of England.

Conclusion - why UK politics is fragmenting:

Throughout the last parliamentary cycle, a core part of the Conservative Party’s base chose to support alternative parties. This core group primarily consisted of older individuals who had obtained fewer qualifications and disproportionately came from working-class backgrounds. Such people had also disproportionately voted to Leave the EU. This split mainly benefited Labour. However, it also helped Reform to gain. Labour, on the other hand, lost to smaller parties, such

as the Greens and Independents. These voters were mainly amongst younger people who had obtained higher-level qualifications.

This fragmentation of the traditional two-party system mostly occurred due to both external and internal shocks. Firstly, strong external shocks caused the public to focus on different issues other than Brexit. Therefore, the 2019 Conservative coalition that largely agreed on how to manage the biggest issue of the day was compelled to think about other issues they did not necessarily agree on. The most prominent of such thoughts were economically related. As the Conservative base had merged groups that historically had not been natural allies on economic matters, this made it hard to keep these voters together. As the UK exited the pandemic and inflation rose, some parts of the Tories' new base would have been hit harder than others. This decline in the standard of living decreased support for the Conservative Party and allowed Labour to once again be viewed as the most economically credible party. This renewed credibility allowed Labour to recapture some of the votes it lost in 2019. Additionally, the immigration issue became prominent again towards the end of the parliament, also pushing the Conservative vote down and allowing Reform to gain. The Greens also gained when voters thought about other non-economic issues, such as the environment. Vivaly, such changes in thinking allowed smaller parties to make significant gains from both the two main parties. Such movements helped to strongly fragment the party system.

Secondly, internal shocks within the Conservative Party likely dented the public's confidence in the party's ability to govern. Partygate, no-confidence votes in Johnson's leadership and Truss' failed mini-budget also coincided with large decreases in the Conservative Party's favourability ratings. It also allowed Labour to be seen as having the best leader to perform the role of Prime Minister. This reversal in leadership credibility partly caused the 2019 Conservative base to fragment. Whilst this allowed Labour to gain amongst some voters, others drifted to smaller parties.

Therefore, impactful events that came from within the parties and from external crises tore apart the Conservatives' 2019 large voting bloc. This voting bloc splintered across many different parties for contrasting reasons. Whilst Labour was the main beneficiary of this collapse, it has led to a scenario where four parties can consistently poll over 10% of the vote. This has weakened the two-party system that emerged in the late 2010s and has created something that now more resembles a fragmented European multi-party system. With hindsight, this direction of travel in the polls has continued into 2025, indicating that the fragmentation of British politics is currently a core part of British political competition.