Where next for the Liberal Democrats?

The UK in a Changing Europe

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It has, to put it mildly, been a difficult twelve months for the Liberal Democrats. A year ago this week, polling conducted by YouGov and Ipsos Mori showed their support at 20% – a level the party had not enjoyed since they'd entered their ill-fated coalition with the Conservatives in the spring of 2010. Nine long years later, they were daring to dream once again: could it be that, under Jo Swinson, we would soon see the UK's electoral map coloured with the same amount of Lib Dem yellow that Charles Kennedy and, latterly, Nick Clegg had once achieved?

The answer, of course, was no. The general election that followed was a not just an electoral disappointment but a disaster – so much so that Swinson herself lost her seat. Not only that, but the party's main policy aim – to reverse the Brexit decision – lay in tatters.

Yet, despite these setbacks, the new electoral geography of the post-Brexit era brings with it challenges but also opportunities for the Liberal Democrats – existential questions but also, if they can exploit their new electoral coalition, some potential answers. This short paper hopes to set all this out just as ballots open for the party's new leader.

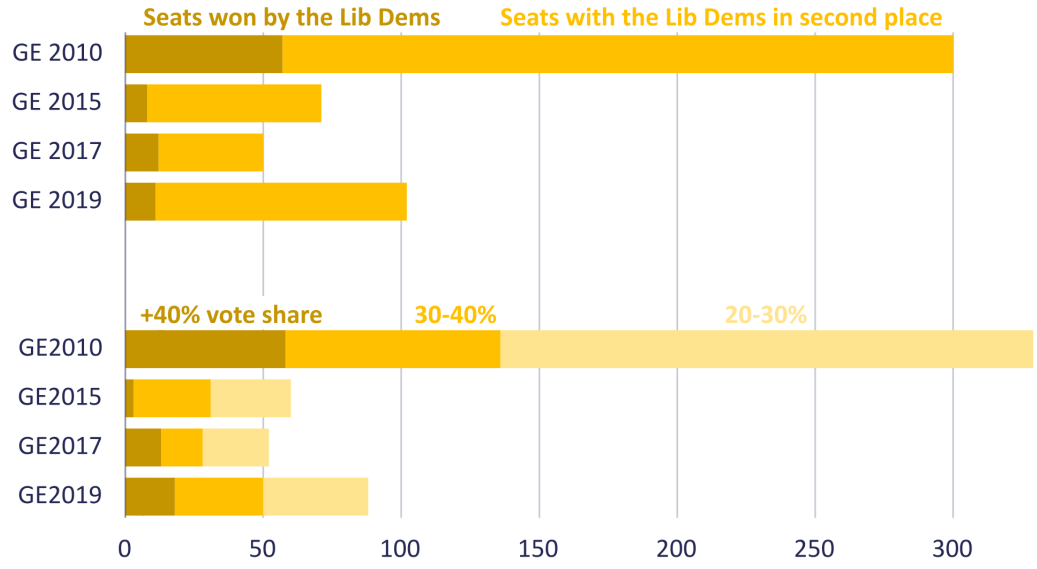
Putting the 2019 result in historical context

The eleven seats the Liberal Democrats won in December 2019 may have represented a slight decline on the dozen the party achieved in 2017 under Tim Farron; but they also represented a near-halving of the 21 which, following multiple defections, the party went into the general election defending.

The Lib Dems have now hovered at between 8 and 12 seats, won across the three general elections of 2015, 2017 and 2019 – not so very different from the historic Liberal Party, which hovered at between 6 and 12 seats for the nearly four decades that elapsed between its wipe-out in 1945 and the creation of the SDP in 1982. There is a risk, then, that the very limited range illustrated by the post 2015 *gold* bars in the top section of Figure 1 could become the Lib Dems' new normal. In short, while they may escape extinction, long-term paralysis looks like a distinct possibility.

Figure 1: **The 2019 election was a partial recovery for the Liberal Democrats**

Liberal Democrat constituency results in general elections between 2010 and 2019.



Source: UK general election results, 2010 to 2019.

Yet the picture is more promising than it first appears. Delving deeper, this apparent stasis hides a significant level of turnover and volatility. In fact, only two seats – Orkney and Shetland, and Westmorland and Lonsdale – were won by the Lib Dems in both the 2015 collapse and in December 2019.

Instead, the party offset further losses in 2017 and 2019 by winning, and – just as importantly – becoming competitive, in new parts of the UK. Moreover, it has become more competitive in a greater number of places: the 91 seats in which the party is now in second place (represented by the *orange* bar in the top half of Figure 1) is significantly higher than the 66 in which it finished second in 2015, and the 38 in which it was the runner up in 2017.

Yes, the UK operates under first past the post – and the clue is in the name. But for the Lib Dems, these second places matter. At the last election, in many seats that were electorally propitious on paper – both in demographic terms and in their support for Remain – the party was hindered by the fact that it had finished in third place behind the Labour Party in 2017. This led Lib Dem campaigners to make even more desperate use than usual of their famous Focus-leaflet bar charts in order to convince voters, using opinion polls, that a vote for them wouldn't be wasted – a tactic sometimes so ludicrously obvious that it often backfired.

Evidence from the British Election Study shows that voters are far more likely to use the results from the previous election to understand who is competitive in their area than national opinion polls or tactical voting websites. Given a range of options and allowed to choose as many as they liked, 36% of the electorate said they used the 2017 result to understand how competitive each party is in their constituency, 13% said national opinion polls and just 5% said they used tactical voting websites.

Another problem in 2019 was that in many seats, even where the party was in second place, they were miles behind the incumbent. Take the example of Dominic Raab's seat of Esher and Walton, in which a mammoth 18% swing to the party – and an increase in vote share from 17% to 45% – still left them 2743 votes short of taking the seat.

But all is not lost. True, in 2010, there were nearly 140 seats where the party got over 30% of the vote, whereas by 2017 that number had fallen to 28. In December 2019, however, it partially rebounded and is now 50 (the *gold* and *orange* bars combined in the bottom half of Figure 1). This suggests there is a reasonable number of seats where the party is not just in second place but, crucially, within realistic touching distance of the incumbent – if, that is, the party targets its efforts.

The Liberal Democrats have a new heartland

One way of unpacking the volatility we have talked about is to understand where the Liberal Democrats' areas of strength have changed. On the left of Figure 2 below we can see where the party's vote share has declined compared to 2010, but also where it has increased its vote share. On the right of Figure 2, the map shows where the Lib Dems are arguably competitive: where they won, and where they are within 20% (or a 10% swing) of the winning party.

Figure 2: The Liberal Democrats are increasingly a party for southern England

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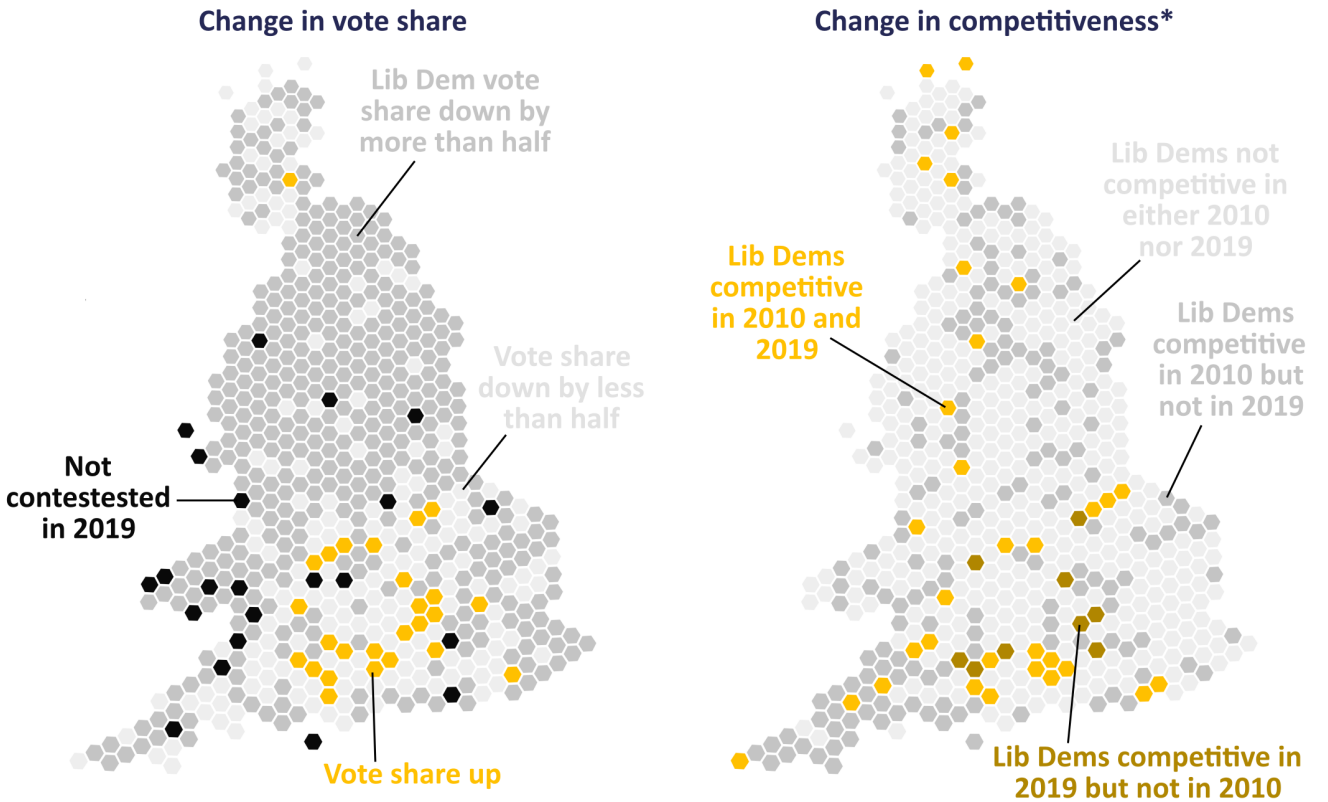
Change in Liberal Democrat performance between the 2010 and 2019 general election.



*Competitive seats are defined as seats the Liberal Democrats either won or were within a 10% swing of winning.
Source: UK general election results, 2010 and 2019.

It is unsurprising – given the party's national share of the vote halved over the decade from 23.0% in 2010, to 11.6% in 2019 – that, in the vast majority of seats, the party's vote share fell substantially.

On the left of Figure 2, every seat in *dark* grey saw the party's vote share fall by half. The map gives a very clear indication, in *light* grey, where the party's vote share held relatively steady: in short, the party has clearly become a more southern party in the last decade.

The areas of growth – where Jo Swinson did better than Nick Clegg – provide a 'yellow halo' of new electoral strength for the party in parts of London, Surrey, Oxfordshire, Berkshire, Hampshire and Cambridgeshire.

This relative increase in support in parts of the south and south-east has been matched by a decline in the south-*western* seats associated with Paddy Ashdown's leadership. The *dark* grey in the south west on the map on the right of Figure 2 tells this story. In 2010, the south west was as close as the Lib Dems came to having a 'heartland'. The party won 15 seats out of 55 in the region, and were competitive in a further 27 seats. Now, the party only holds one seat and is competitive in a further 5 seats.

True, the party's 2019 vote share was 18% in both the south west and south east. But it remains the case that the Lib Dems now have a far greater number of favourable target seats in the south and south east of England. And that is because their legacy vote in the south west is much less effectively distributed than in areas in which the party has recently caught up with the Conservative in the south and south east.

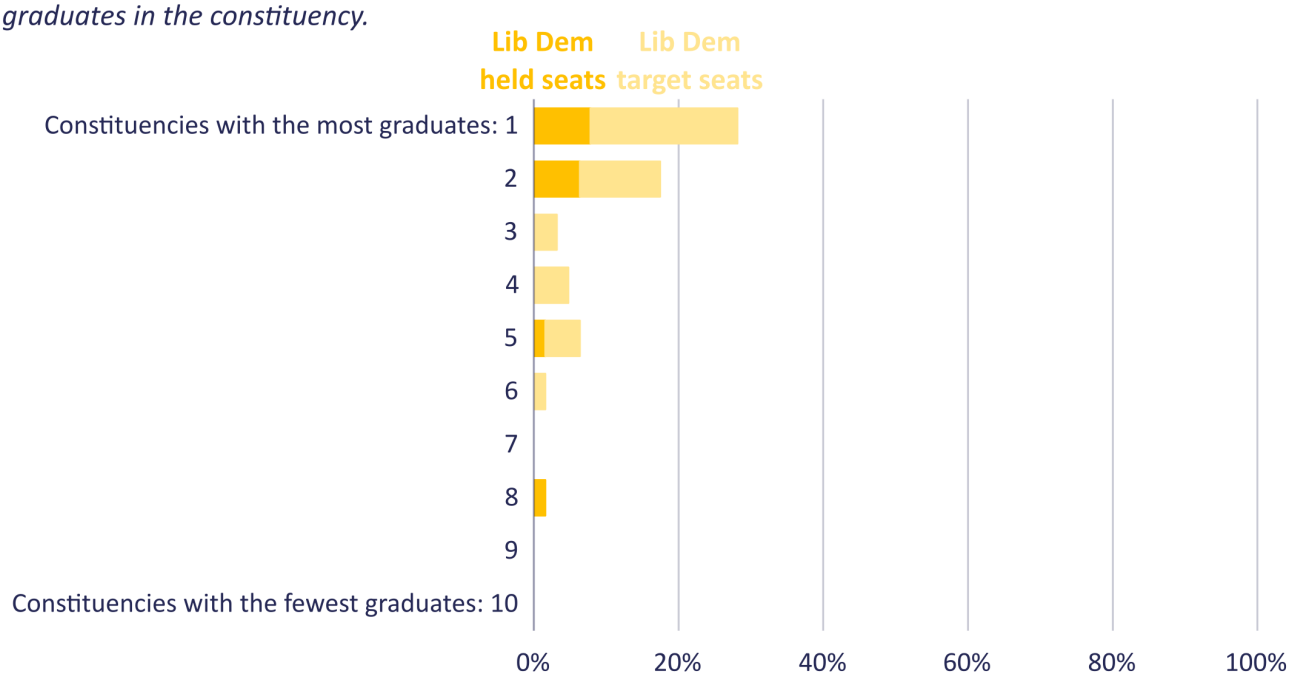
Do the Liberal Democrats have a new 'core vote'?

The long-time organising force (and, since the 2019 election, joint acting leader) Mark Pack has long made the case the Liberal Democrats need a 'core vote' strategy if it is to avoid the constant flux and uncertainty that has imperilled the party's in the last decade. Well, it now looks like the party may have stumbled upon the foundations of one.

The Liberal Democrat vote is highly correlated with levels of education, reflected in both the aggregate polling data and the constituency level data here. Almost all the party's seats and future target seats are in the top 50% in terms of the number of graduates. On the other hand, the party either holds now or is highly competitive in 30% of the 64 seats that are in the 'top ten' in terms of the relative number of graduates.

Figure 3: **Liberal Democrat target seats typically have more graduates**

Liberal Democrat held and target seats after the 2019 general election, by decile for percentage of graduates in the constituency.



Source: UK general election result 2019; Census data 2011.

How should the party position itself against its opponents?

The age-old debate within the Liberal Democrats – about the party's relationship with Labour, and the degree to which it should attempt to position itself between the two largest parties – looks like being the dominant theme of the leadership contest.

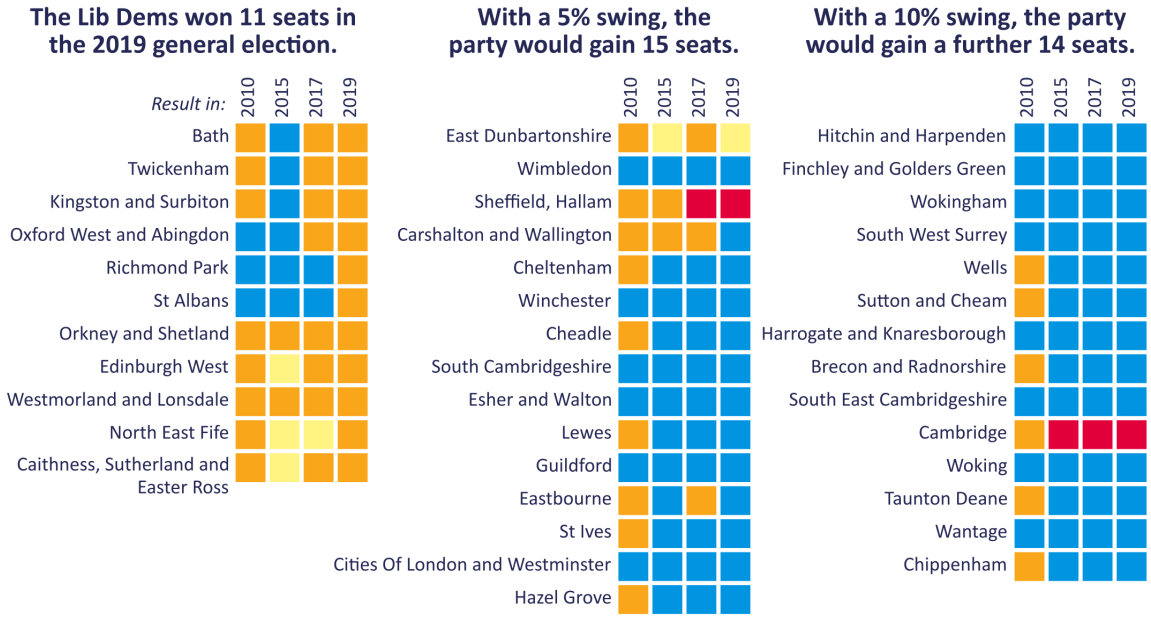
If the Liberal Democrats continue their current demographic and geographic trajectory, then the Labour Party would be set to benefit. Modest Lib Dem gains would cut the electoral mountain faced by Keir Starmer – one which we have previously outlined.

That is because there are 29 seats that the Lib Dems could reasonably claim to be well positioned to win. In 23 of these seats they are the main challenger to the Conservatives, and every other party is a distant third. The exceptions are the three blue London seats below (Wimbledon, Cities of London and Westminster and Finchley and Golders Green) and the three held by the SNP or Labour (East Dunbartonshire, Sheffield Hallam and Cambridge).

Were the Lib Dems to win the first 11, where they are the very clear challengers to the Conservatives, they would double their representation. This is by no means a big ask: after all, the largest of the majorities the Lib Dems would have to overturn in those seats would be Hazel Grove, where the party is only 4,432 votes behind the Conservative incumbent William Wragg.

Figure 4: **Liberal Democrat target seats are mostly Conservative held**

Breakdown of the Liberal Democrats' target seats after the 2019 general election.



Source: UK in a Changing Europe analysis of UK general election results, 2010 to 2019.

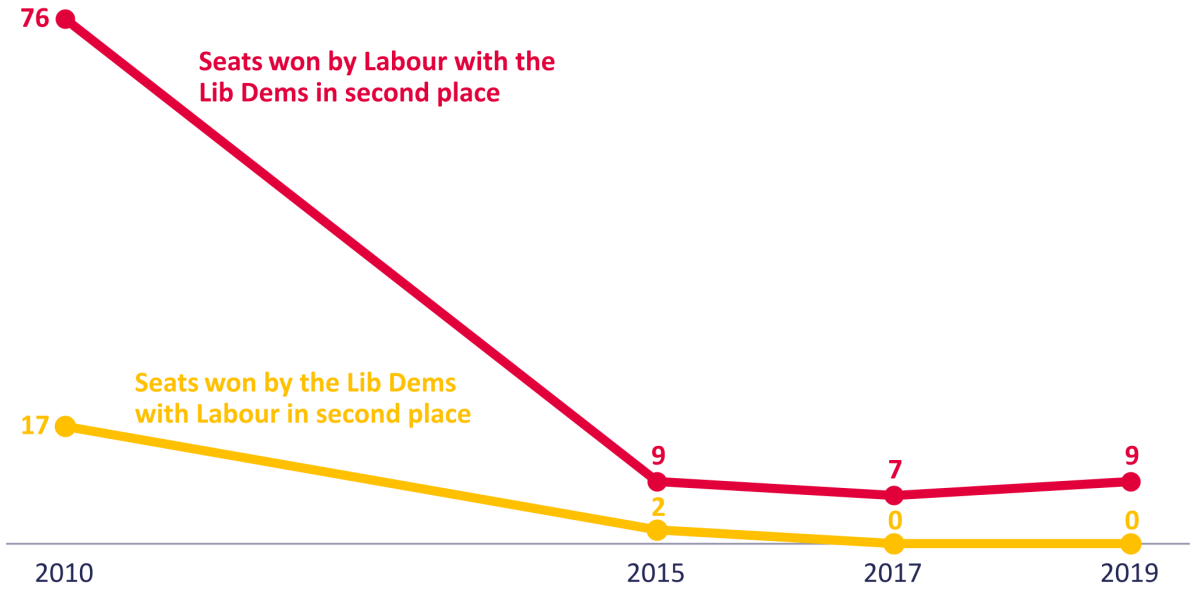
The picture painted by the squares above – that the Liberal Democrats are principally challengers to the Conservative Party – is now pretty well-acknowledged within the party. The difference lies over what the logical conclusion which flows from this really is.

Some in the party argue further consolidating the anti-Conservative vote in these constituencies is the route to success. Others argue, however, that the Lib Dems could and should position themselves principally to win over *Conservative* voters in these constituencies. They may well have a point: it is worth noting that – of those 11 seats described above, where the Lib Dems are the clear and near challenger – the Labour Party achieved an average of only 7.8% of the vote in the last election.

This relatively clear distinction between the geographical strength of the Labour and Liberal Democrats wasn't always the case. There are now just 9 seats in the entire country where Lib Dems are the key challengers to Labour, down from 76 in 2010. And, while back in 2010 over a quarter of the Lib Dems' 57 MPs were defending seats against Labour challenge, today there are no Lib Dem MPs whose main electoral threat comes from the Labour Party.

Figure 5: **The number of Labour vs. Liberal Democrat marginals has fallen**

Number of seats with Labour and the Liberal Democrats in first and second place in general elections since 2010.



Source: UK in a Changing Europe analysis of UK general election results, 2010 to 2019.

Grasping the following paradox, then, is central to any debate on the Lib Dems' strategy, going forward: while both the Liberal Democrats and Labour have found their support more heavily concentrated in southern England and among graduates than ever before, the two parties have increasingly distinctive and non-concurrent interests at a constituency level.

In theory, this provides the conditions for a symbiotic relationship with Keir Starmer's Labour Party. In practice, of course, things might not be quite so easy – not when many Lib Dem activists are also councillors (or would-be councillors) on local authorities where there is no love lost between them and their Labour counterparts. For some of them, the building of some kind of progressive alliance nationally will be far lower down their list of priorities than taking on and beating Labour locally.

The 'moderate Tory' challenge for the Lib Dems

But even if that particular obstacle can be overcome so that the party can focus principally on attracting current Conservative voters, there are some additional downsides and difficulties. All politics is local, but, as we have already hinted at above, Liberal Democrat politics is more local than most. In the last general election the party's task and its message was made easier in some key seats – the best examples being Raab's Esher and Walton, and John Redwood's Wokingham – where the party's 'stop Brexit' message would have resonated with many former Tory voters fed up with their high-profile pro-Brexit MPs. However, these cases are not typical. Conservative MPs defending their seats against Liberal Democrat challengers are more likely than a typical Conservative MP to have supported remain in 2016. Indeed, 56% (15 out of 27 to be precise) supported Remain, compared to 35% of all current Conservative MPs.

Figure 6: **Conservative MPs facing Lib Dem challengers are more likely to have supported remain**

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Positions taken by Conservative MPs elected in 2019 in the 2016 EU membership referendum.

Conservative MPs in Liberal Democrat target seats

Constituency	*MP*	*Swing needed*	*2016 Brexit position*
Wimbledon	Stephen Hammond	1%	Remain
Cheltenham	Alex Chalk	1%	Remain
Winchester	Stephen Brine	1%	Remain
Cheadle	Mary Robinson	2%	Remain
South Cambridgeshire	Anthony Browne	2%	Remain
Cities Of London and Westminster	Nickie Aiken	5%	Remain
Hitchin and Harpenden	Bim Afolami	6%	Remain
Finchley and Golders Green	Mike Freer	6%	Remain
South West Surrey	Jeremy Hunt	7%	Remain
Wells	James Heappey	8%	Remain
Harrogate and Knaresborough	Andrew Jones	8%	Remain
Brecon and Radnorshire	Fay Jones	9%	Remain
South East Cambridgeshire	Lucy Frazer	9%	Remain
Taunton Deane	Rebecca Pow	9%	Remain
Chippenham	Michelle Donelan	10%	Remain
Wantage	David Johnston	9%	No info
Carshalton and Wallington	Elliot Colburn	1%	Leave
Esher and Walton	Dominic Raab	2%	Leave
Lewes	Maria Caulfield	2%	Leave
Guildford	Angela Richardson	3%	Leave
Eastbourne	Caroline Ansell	4%	Leave
St Ives	Derek Thomas	4%	Leave
Hazel Grove	William Wragg	5%	Leave
Wokingham	John Redwood	6%	Leave
Sutton and Cheam	Paul Scully	8%	Leave
Kensington	Felicity Buchan	9%	Leave
Woking	Jonathan Lord	9%	Leave

All Conservative MPs (2019)

Source: UK general election result 2019; Yale University; news reports on MPs' referendum positions.

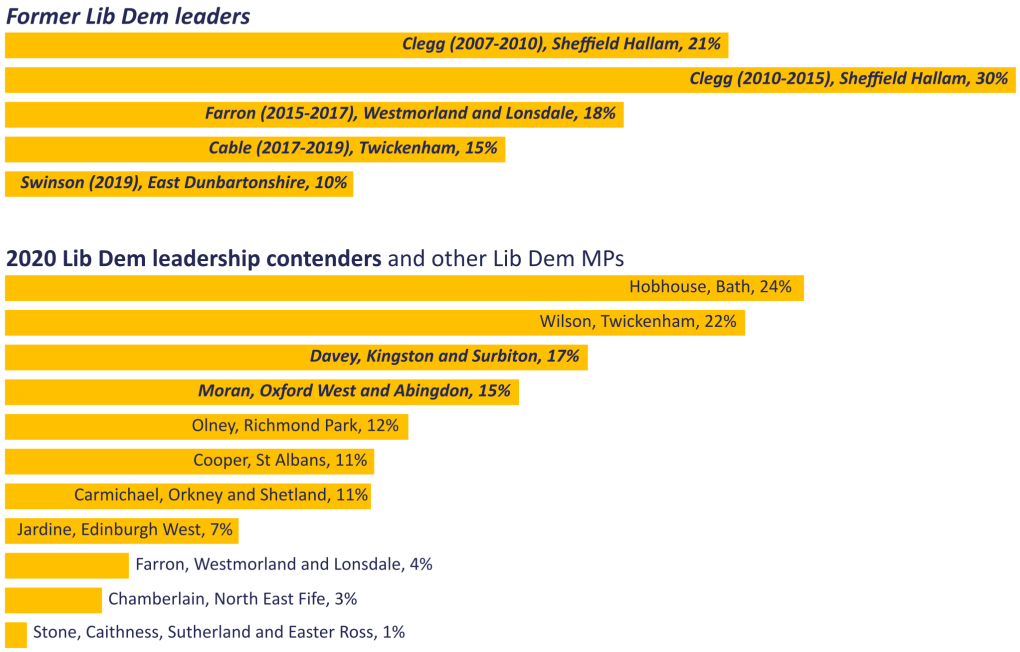
Doubtless, memories of who voted what in 2016 will have faded in further into the past by 2024. However, if Brexit remains something of a proxy for a set of attitudes that sets those Tory MPs in opposition to the direction of Johnson's Conservative Party, then it could still help them fend off any Lib Dem challenge. Among the MPs most vulnerable to a Lib Dem challenger, don't forget, are some high-profile, broadly pro-European rebels, including Stephen Hammond (one of the 12 Conservative rebels who caused a government defeat on securing a meaningful vote) and Steve Brine (one of the 21 Conservative MPs expelled – in his case only temporarily – from the party in September 2019 for supporting a bill aimed at preventing no deal Brexit). Jeremy Hunt, too, has increasingly become something of a thorn in Boris Johnson's side over the government's handling of the Covid-19 crisis. All this might make only a marginal difference – but it could still be an important one if the Lib Dem is targeting 'moderate' Tory voters.

There is still no such thing as a Lib Dem safe seat – even perhaps for the party's leader

One fact that Liberal Democrats have had to learn the hard way in recent years is that there is no such thing as a Lib Dem safe seat. Certainly, in the past, holding seats has been not just a function of the national swing but depended a great deal on a strong incumbent. The party and its predecessors have always had problems holding seats, especially in England. Indeed, Twickenham in 2019 was the first time a fresh candidate had held an existing Lib Dem seat since 2010.

Figure 7: **Both Ed Davey and Layla Moran hold relatively strong parliamentary majorities**

Constituency majorities of former Liberal Democrat leaders, 2020 leadership contenders, and other Liberal Democrat MPs.



Source: UK in a Changing Europe analysis of UK general election results, 2005 to 2019.

Moreover, holding on has proved problematic even for the party's leader (see Figure 7). In 2015, Nick Clegg almost lost his seat, seeing his majority fall from 30% to 4%, and in 2017 Tim Farron's majority fell from 18% to 1.5%. Jo Swinson narrowly lost her seat in 2019 despite defending a seemingly reasonable majority of 10%.

The necessity for a relatively strong majority may well have helped reduced the field in the leadership contest to just two candidates. And on the face of it both Ed Davey and Layla Moran have majorities equivalent to those held by Tim Farron and Vince Cable, and which grew significantly between 2017 and 2019. Yet Moran's constituency was won by the Conservative Party at the height of Clegg's popularity in 2010, and Davey's was lost as the Lib Dems collapsed in 2015.

Both candidates for the Lib Dem leadership, then, will have to live with the real possibility that political and personal defeat could end up being the price of taking the job. But it is a job that brings with it a genuine opportunity to grow the party once again – if, that is, they make the right strategic calls.