

POLLING

ELECTIONS 2021: A NATION DIVIDED

**TORIES SWEEP UP COUNCIL SEATS ACROSS ENGLAND,
BUT LABOUR HOLDS FIRM IN WALES AND SNP CLAIMS MANDATE FOR INDYREF2**

The dust has now settled after a weekend where the results of last week's elections dripped through slowly over several days, held up by Covid restrictions. The picture that has emerged is one of a United Kingdom that remains strongly divided, with the main parties' fortunes varying wildly between the different nations, as well as between urban areas, towns and the countryside.

The local elections which took place in England were by and large a major success for the Conservatives, who gained 235 councillors and took control of 13 more councils. Governing parties almost always perform badly in mid-term locals. To win the likes of Dudley, Pendle and Northumberland – hardly traditional Tory-voting areas – is remarkable. In Rotherham, where Labour clung on to power, the Conservatives increased their number of councillors from zero to 20. Minor Labour victories in areas like Cambridgeshire, where the Conservatives lost control of the county council, failed to cut through as the 'crumbling red wall' narrative solidified.

Nowhere was this more apparent than in Hartlepool, where the early by-election result set the tone for what was to come across England. The scale of the Conservative victory – a 16% swing from Labour – was unprecedented in a post-war by-election. The Prime Minister, who visited Hartlepool three times during the campaign and travelled there again on Friday to celebrate the result, offered a simple analysis of how that political realignment had been achieved: "This is a place that voted for Brexit...we got Brexit done."

The 13 English mayoral results were more of a mixed bag. Labour seized the Cambridgeshire & Peterborough and West of England mayoralities from the Tories, but failed to win in the hard-fought West Midlands or Tees Valley contests. The result in London was much closer than almost anyone had expected, with Sadiq Khan surviving a late scare to win with 55% of the vote in the second round. Meanwhile, Batley and Spen MP Tracy Brabin's election as Metro Mayor of West Yorkshire will trigger another 'red wall' by-election at which the Conservatives will now more than fancy their chances.

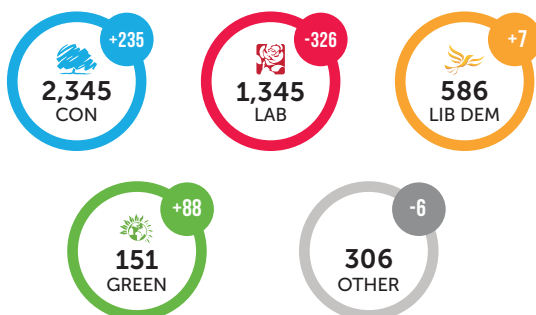
Wales was Labour's only real success story. The party won 50% of the seats in the Welsh Senedd and are set to govern without an official arrangement with another party. They gained seats and vote share and largely held on to vulnerable areas in the north-east (Vale of Clwyd was the only seat to turn blue). The prolonged and scrappy coalition-building exercise some had predicted will be avoided.

In Scotland, the SNP came agonisingly close to matching that feat, falling one seat short of an overall majority (it appears tactical voting by unionists was just effective enough to deprive them). Much post-election attention has focused on the solid pro-independence majority the eight Green MSPs now help to make up in Holyrood, and what it means for the country's future. The SNP argue that the parliamentary numbers mean it's now a question of "when, not if" a second referendum takes place; unionists use the same numbers to argue that the case for a referendum is weaker now than when the party had an overall majority in 2012 (the year the UK Government gave its consent for one to be held).

This week, in the aftermath, each party will look to drive its policy agenda forward. Tomorrow's Queen's Speech will reportedly include plans to help people find "good employment" in their local areas – a policy directly targeted at red wall voters. Labour plans a "root and branch" review of its policies and has already carried out a chaotic front-bench reshuffle. Nicola Sturgeon faces internal pressure to spell out the exact path to a referendum, while her opponents argue to do so during the pandemic would be grossly irresponsible.

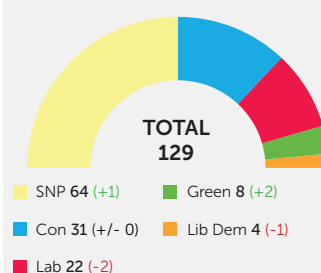
LOCAL ELECTION RESULTS

Number of councillors



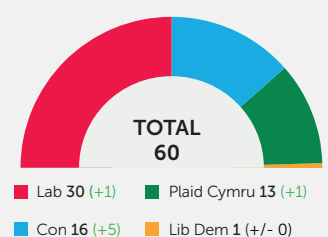
SCOTTISH PARLIAMENT

Number of seats



WELSH PARLIAMENT

Number of seats



WHAT IT MEANS FOR LABOUR

The Hartlepool by-election was always going to be the scalp of the night if the Conservatives managed to win the seat. The 16% swing from Labour to the Conservatives will lead many to see the result as further damning evidence of Labour's failure to connect to working class voters.

The seat had been represented by Labour MPs since its creation in 1974 and the Conservative gain is only the third time a governing party has won a seat in a by-election in the past 50 years. Many will ascribe the victory to the collapse of the Brexit Party, the so called "vaccine-bounce", and Labour's candidate Paul Williams (a major player in the People's Vote campaign who lost the nearby seat of Stockton South). At the last General Election however, with Conservative candidate Jill Mortimer parachuted in with seemingly little knowledge of the local area, the Conservative's triumph in Hartlepool must also be attributed to the effectiveness of its broader message. A party that has been in power for more than a decade continues to successfully promote itself as a vehicle for change, promising investment and regeneration to areas which in the past would have been electorally untouchable.

This then begs the question of "what next" for Sir Keir Starmer and the Labour Party. It was no surprise that the Labour leader moved so quickly to reshuffle his top team, seeking to draw a line under the last week and mark the start of new beginnings. However, the handling of the process left Starmer facing even more criticism. As news broke on Saturday that Deputy Leader Angela Rayner was to be sacked as party chair and national campaigns co-ordinator (or moved, depending on who you believe), it created a backlash that dominated – and derailed – the entire process.

The challenge facing Starmer is stark. Short of authority, he leads a party that finds itself at odds with the shifting sands of British politics; facing an identity crisis, no longer able to rely on the support of a core of working class voters. Long-standing Labour voters blame the party for their problems rather than seeing Starmer as the route to a better future. Policies will help. But first he and his Shadow Cabinet need to be able to have a conversation with the people who've stopped voting Labour in recent years – something last week's results showed they are failing to do. His success in doing so could define the fortunes of the Labour Party for decades to come.

THE STORY IN SCOTLAND

The Scottish parliamentary campaign contained almost everything we have come to expect from such events: division, grievance and constitutional wrangling.

One conspicuous omission from the itinerary was a visit from the Prime Minister, a staggering 'no show' which, despite the pandemic, would have been unthinkable from any of his predecessors. The Scottish Conservatives had pleaded with Boris Johnson not to visit for fear it would help get the SNP vote out – an acknowledgment of the toxicity surrounding the PM's brand north of the border. What the majority of voters of Hartlepool see in the Prime Minister, most Scots see the opposite.

Whilst both the unionist and nationalist sides say the results give a mandate to their respective positions on the future of the Union, the truth is little has changed – we remain in a constitutional no man's land, which could see Scotland go either way in the years ahead.

A thumping result for the SNP sees them returned for a fourth consecutive term, winning 64 of the 129 seats – incredible for a party who have been in government for 14 years under a proportional voting system, but crucially missing out on an outright majority by one. The SNP argue that this, alongside the Green's eight seats, gives a parliamentary majority for independence, as both parties went into the election explicitly saying they would call for another referendum.

Politically, the lack of an outright majority is psychologically damaging for the SNP, and gives the UK Government some room to say their campaign was a failure – underlined by the fact public opinion on independence is split 50/50. Of course, theoretically the argument that there is not a parliamentary mandate for independence is thin, if not

absurd. If, for example, the 2019 General Election had returned a majority of parties who had committed to a second referendum on Brexit, it is inconceivable to think it wouldn't have taken place.

What we know for certain is the UK Government will say, politely to begin with, this is not the time to be talking about the constitution, all focus should be on recovering from the pandemic and rebuilding the economy. It's perfectly conceivable that that position could hold for several years. It's important too to remember that the economic case for independence now is significantly worse than it was in 2014, so we can expect the UK Government to push on that point.

Where it may get tricky for No 10 in the months ahead is if a majority for independence in Scotland starts to build and the level of support becomes sustained. It looked like things were headed that way last year until the vaccine roll out. If support for independence starts to stick at 55%+ and can stay there for a while, the SNP/Green majority will become a real problem for Boris Johnson. Continued refusal from the PM to allow a referendum could become the greatest recruiting sergeant for independence.

So too may a potential Supreme Court case, if it were to shed any doubt on the constitution being a reserved matter while this outcome seems unlikely. Judges have been a thorn in the side of the UK Government in recent years. For Nicola Sturgeon, she has a difficult balancing act ahead and timing will be everything. She needs to wait for the polls to switch in her favour, but she also needs to placate a grassroots wanting to charge ahead now. The waiting game suits Boris Johnson.

One thing we know for sure, for the people desperate to see Scotland's political agenda return to domestic matters – like education, the NHS, jobs – they have some time to wait.

THE STORY IN WALES

Mark Drakeford will retain power as the First Minister of Wales after Labour won 30 of the 60 seats in the Welsh election. Although one seat short of an outright majority, Welsh Labour are looking to form a government without the help from other parties. This is not unusual as the party has been in power in Wales either in coalition or as a minority ever since devolution in 1999.

That said, Drakeford may need support from the opposition parties to pass laws and get Labour's spending plans through the Senedd. The Welsh Government ruled in a minority from 2011 to 2016, securing deals with the Liberal Democrats and Plaid Cymru at various points to pass budgets.

Meanwhile, the Conservatives had their best Senedd election securing 16 seats. The Conservatives took the Vale of Gwent from Labour for the first time in 22 years and took Brecon and Radnorshire from the Liberal Democrats, but Clwyd South and Wrexham, which both voted Conservative in the 2019 General Election, remained red.

Plaid Cymru came in third with 13 seats, gaining one seat on their 2016 result. However, former Party Leader Leanne Wood lost her seat in Rhondda to Labour, bringing an end to her 18-year Senedd stay. The Liberal Democrats lost their only constituency seat of Brecon and Radnorshire, held by retiring former leader Kirsty Williams, but the new Liberal Democrat leader Jane Dodds won a regional seat. There were no wins for smaller parties, including UKIP, Abolish the Welsh Assembly Party and Reform UK. The new Senedd features 34 men and 26 women. 19 of the 60 MSs, just under a third, are serving in the Senedd for the first time.

Despite fears that turnout would be exceptionally low due to the Covid-19 pandemic, turnout for the election was the highest in the Senedd's history (46.6%). This was just slightly higher than the record (46.3%) at the first Senedd election in 1999.

Drakeford declared that Labour's response to the Covid-19 pandemic helped the party retain power, and that his Welsh Government would be "radical" and "ambitious". Time will tell if he lives up to this promise.

ANALYSIS: UK'S POLITICAL STRUCTURE CONTINUES TO SHIFT

Glance at this weekend's media coverage and you'd be forgiven for thinking the UK's political dye has been cast for a generation, with Boris Johnson seemingly headed for a decade in power, and Keir Starmer and his party on the verge of years in the wilderness.

And yet a mere ten days ago you'd be forgiven for thinking the exact opposite. Back then it was Johnson who was on the ropes over trust and competence. The veracity of his every utterance appeared in doubt. Starmer by contrast was at his forensic best as he grilled the Prime Minister over allegations of sleaze and corruption.

In politics the truth is always of course more complex, more nuanced, and far less certain than the diametric headlines on our front pages week to week. What is certain after these elections is that the demography of British politics continues to shift. England is now largely Tory outside the big cities. Labour is the party of those big cities and of Wales. The SNP is the dominant force in Scotland.

The one word that links all this? Governing. In the middle of a successful vaccine rollout it is the governing party in each nation that has done all the running in these elections. Johnson's Tories in England. Mark Drakeford's Labour in Wales. Nicola Sturgeon's SNP in Scotland. All three have benefited from timing, luck, and huge media exposure.

Ask yourself, would the capture of Hartlepool, and a raft of more significant council victories across England have been possible for the Tories at the height of the pandemic, when every decision, delay, and mistake was under the microscope? Maybe. Maybe not.

But then timing and your opponents are everything in politics. This PM has enjoyed a considerable slice of luck when it comes to both. An election in the last embers of a pandemic, against a new leader of the opposition, and with many of us having been successfully jabbed, is just one more example of that.

For now, for the Tories, there is elation. They comfortably held rural England and the commuter belt, and they continued to make inroads into Labour's old industrial northern heartlands, the so-called Red Wall.

At this point some perspective might be helpful. Take Hartlepool. A case of the three Bs - Brexit, Ben, and Boris.

It may traditionally have been a Labour town, but above all Hartlepool is a Brexit town. A massive Brexit Party vote in the last general election was always likely to end up turning blue.

Then there's the popular neighbour next door. Ben Houchen's whopping re-election as Tory mayor of the neighbouring Tees Valley undoubtedly helped in Hartlepool.

And of course there's Boris. The one politician whose vices actually make him seem more human to many voters. As those lurid allegations swirled around him recently Johnson effectively told reporters nobody cares about my wallpaper or what I did or didn't say. And so it proved.

Johnson has comprehensively mastered the language of these former Labour strongholds, where he is viewed as in-touch, one of us, a decent bloke. Back in 2016 he recognised something Labour didn't - that its base felt left behind and ignored. He's been tapping into that discontent ever since. Winning big in 2019. Delivering Brexit. Promising to level up by building back better, only for the pandemic to put politics on pause.

Now, with the vaccine working, voters across England have effectively said, "Pause over, on you go Boris." Oh, and he also happens to be the standout campaigner of his generation - which helps.

One place he won't be seen campaigning any time soon however is Scotland, where there is now a numerical majority for independence - 64 seats for the SNP, and 8 for the Greens. For Sturgeon these are the numbers that scream 'indyref2'.

Voters, however, finds themselves more evenly split between those who support independence and voted SNP or Green, and those who don't and voted Conservative, Labour or Liberal Democrat.

That means any referendum is a huge risk for both the First Minister and the Prime Minister. She wants it. He is implacably opposed to it. But make no mistake, it represents the biggest threat to the future of the United Kingdom, and by extension to the longevity of Johnson's premiership.

Add Brexit uncertainty, rows over customs checks in Northern Ireland, and events in Wales where Labour will continue to govern for yet another term, and it isn't hard to see why the PM's biggest political headache going forward might well be constitutional.

What then of Labour? Churchill famously said being shot was a kindness compared to being leader of the opposition. And so it has proved for Starmer during the pandemic. He and Labour undoubtedly have a problem. He has been largely invisible. Voters, and much of the party's once solid northern working-class base, don't yet know what Starmer's Labour stands for.

Starmer is of course rebuilding from an historic low. But he will know Labour's only election winning leader of the last forty years - Tony Blair - won from a base that already included Scotland and the Red Wall. Today that nirvana looks miles away. Undoubtedly there will be change. For Labour it is the direction of that change that will really matter between now and the next General Election.

And what of Johnson? Here I'd urge caution, and a reality check. When furlough ends, unemployment rises, or the Treasury can't afford to fund that long promised railway line, hospital, or infrastructure project the Johnsonian 'big government big spend' offering may not look quite so appetising.

At some point there will be a public inquiry into the handling of the pandemic. It may be damning. It seems there's more to come on sleaze, and if what comes out of No 10 isn't seen as benign spin, but something more serious, there may be trouble ahead.

Then there's the raft of manifesto promises Johnson made to just about everyone pre-pandemic - on everything from the NHS and social care to investment in infrastructure, housing, schools, and green energy. Even now we know remarkably little about the plan to deliver on these promises, and even less about how we will pay for it. Neither do we know quite what levelling up really looks like or indeed what it might entail.

He may be a mighty campaigner, but the Prime Minister is not a strategist. Campaigning and delivering are very different beasts. That's presumably why, albeit belatedly, he is acting. Just before the elections No 10 announced the creation of a delivery unit.

Finally, there are the doubts and the concerns. Over Johnson's decision making. Over his lack of a genuine support base in Westminster. Over his troublesome backbenchers. Over the manoeuvrings of ambitious Ministers. And over the issue of just what is going on behind that black door.

From the very start Johnson's Number 10 has been a hotbed of infighting, power struggles, backstabbing, and briefing wars. Privately, senior Tories fret about Johnson's ability to manage all this, and the effect it continues to have on his ability to decide and deliver. As one minister lamented to me recently "two years in power and still it's all about the f*** advisors."

Why does any of this matter? Because whilst you are delivering on your promises voters tend to forgive questions of trust and dismiss questions of competence. Fail to deliver however, and voters - especially those who have lent you their votes for the very first time - might just decide trust and competence do matter after all.



Will Walden is Edelman's senior counsel for strategic communications across EMEA. A former political journalist he was Boris Johnson's spokesman, communications director, and chief advisor for many years.

ADVOCACY AND PUBLIC AFFAIRS

ABOUT EDELMAN

Edelman is the world's largest public relations agency, independently owned, with more than 5,000 employees and 67 wholly-owned offices. Edelman in London is an integrated communications agency with over 500 consultants, delivering programmes for FTSE 100 companies and Global Fortune 500 companies, including the top 3 of Management Today's Most Admired companies and 5 of the top 20 Business Superbrands. Edelman was recently named PRWeek UK's Agency of the Decade.

We create specialist teams for our clients which integrate people with extensive experience from politics, corporate communications and the City. This allows us to provide you with a robust, integrated point of view on the challenges and opportunities, develop new ideas and have the experts you need to handle communications around any situation. This way of working has allowed us to maintain client relationships that span decades. We will be an extension of your team, helping deliver concrete results at the pace you need.

ADVOCACY AND PUBLIC AFFAIRS

Edelman's UK advocacy and public affairs team are recruited from a range of backgrounds including parliamentary aides from across the political spectrum and people with deep NGO, business and political party expertise. We offer the highest quality of strategic counsel, intelligence led monitoring and reliable day-to-day logistical support. Drawing on Edelman's unparalleled understanding of how to drive trust, our advocacy and public affairs team uses its campaigning experience, policy insight and network to help clients inform public policy debates and achieve better outcomes.

ANALYSIS FROM



Luciana Berger
Managing Director,
Advocacy and
Public Affairs
Former MP and Shadow
Cabinet Minister



Will Walden
Edelman EMEA senior
counsel for strategic
communications
Former Director of
Communications and chief
counsel to Boris Johnson



Ross Reid
Associate Director
Former Number 10
Special Adviser



Ailsa Nicol
Associate Director



Abigail Smith
Account Director



Elliot Langley
Senior Account Manager

CONTACT

Luciana Berger
luciana.berger@edelman.com