

PARTY SHIFTS AND ELECTORAL PENALTIES:  
TESTING THEORIES OF PARTY COMPETITION IN BRITAIN

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# Party Shifts and Electoral Penalties: Testing Theories of Party Competition in Britain

## Abstract

Do parties lose voters due to ideological shifts? If parties suffer penalties then they can also be constrained from adapting, yet this widely cited assumption of party competition theories has not been previously tested. British political parties have changed ideological position, converging on the left-right dimension of public opinion and diverging on European Integration. This paper tests the electoral impact of these British party shifts on voter defection and abstention. Using British Election Panel Study data between 1992 and 1997 and 1997 and 2001 the paper tests four explanations: an interests model, a socio-psychological model, a valence model and a competition model. Much less than confirm the policy shifts model of party constraint, the findings predominantly support valence explanations of abstention and defection, mediated by competitive context. The implications of the paper are that parties are freer to change ideological position than previously assumed.

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Are parties free to shift their ideological positions or are they constrained by the views of past voters? Such a tension is highlighted in theories of party competition. Either parties are viewed as the ‘aggregators’ of certain societal interests (Laver 2005), offering a policy package consistent with the views of their supporters, consistent with the ‘policy-seeking’ party type, or parties adapt their policies to appeal to the greatest number of voters, more consistent with the ‘vote-seeking’ or ‘office-seeking’ party type (Strom 1990).<sup>1</sup> These latter vote-seeking theories take the form of the Downsian (1957) prediction of ideological positions towards the median voter, or the directional prediction (Rabinowitz and MacDonald 1989) of party locations on the side of the greatest number of voters. Vote-seeking models have also been offered to explain party divergence. Ideologues tend to be located towards the extremes, pulling rational vote-seeking parties towards positions between the mean of their supporters and the median voter. This assumption is consistent with the arguments of McLean (1982), Aldrich (1983; 1985), Przeworski and Sprague (1986), Kitschelt (1989; 1994), Adams (2001a), Schofield (2004), and others,<sup>2</sup> who cite the ideological motivations of a party’s traditional constituency as a constraint upon ideological moderation and convergence. If a party betrays its ideological principles it can expect to lose its previous supporters because the views of those supporters will no longer be represented. Parties may also simply be punished for ideological shifts simply for inconsistent or opportunistic behaviour over time. Thus parties can either maintain appeals to their previous supporters or adopt ‘chasing’ strategies (Rohrschneider 2002) to go after the greatest number of votes. Whereas some studies focus on activist explanations of parties’ ideological commitments, this paper specifically focuses on explanations that examine policy strategies generated in the pursuit of votes.

This debate is highly relevant to British politics. Conservative strategy between 1997 and 2005 has been described as an appeal to the party’s former voters rather than ‘reaching out’ beyond the Conservative core vote (Green 2005; Cowley and Green 2005). Labour’s centrist shifts under Tony Blair in opposition and then in government were also viewed as a threat to traditional Labourites, and this tension – whether to appeal to traditional Labour issues and voters or to maintain a more centrist strategy - dominates current leadership debate. As the British parties have sought to resolve these tensions the two major parties have been perceived by voters over time to converge on the left-right dimension (Green forthcoming) but to diverge on the European dimension (Evans and Butt 2006). These ideological shifts provide an ideal opportunity to test whether large scale policy or ideological shifts resulted in

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<sup>1</sup> Vote-seeking and office-seeking strategies might be significantly different under proportional systems, but they are likely to be coterminous in plurality systems.

<sup>2</sup> See also: Key (1966), Wildavsky (1965), Robertson (1976), Przeworki (1985), Chappell and Keych (1986), Fiorina (1999), Adams and Merrill (1999), Adams (2001b), McGann (2002), Schofield et al. (2003), Schofield (2005), Schofield and Sened (2005), Adams et al. (2005; 2006) and Laver (2005).

negative electoral impacts. We can thus examine the extent to which electoral incentives exist to mediate against ideological adaptation. By so doing, the paper addresses a timely question in British politics and an untested theoretical assumption in party competition theory, namely, do parties lose votes when they shift ideological positions, and thus, could they be constrained by their previous voters from ideological adaptation?

The empirical analysis compares the significance of spatial shifts in ideological position on two orthogonal dimensions in British voting behaviour, the left-right dimension and the European dimension, against three competing models of abstention and vote switching: a psycho-sociological model of class and partisan attachments, a valence model of perceived performance failures and successes, and a competition model of costs and benefits given electoral options (such as marginality and the number of alternative parties). In testing these theories the paper offers a hierarchical concept of electoral penalties to voters and parties by comparing explanations for people who abstain from supporting previously supported parties compared with those who defect. By so doing, the importance of competitive context is introduced to party strategies and a more refined interpretation of the different costs attached to party evaluations on the vote choice is suggested.

Tavits (2007) argues that prior to her study the link between party shifts and vote maximization has gone untested but that a particularly desirable avenue for future research is to test the impact of shifts across policy domains at the individual level.<sup>3</sup> This paper offers an individual level test of such shifts in the British case, and thus to begins to fill this gap.

### **Ideological Shifts and Voter Defection in Britain, 1992 - 2001**

Links between party policy and voter preferences underlie theories of democracy and representation. It is traditionally assumed that parties seek votes by adopting policy appeals, and that voters make choices according to which party represents their interests. Thus, if a party changes its policy or ideological position there will be an impact on its electoral support, and so it is argued that significant ideological shifts can result in ideological disaffection and electoral penalties.<sup>4</sup> What could be termed the *interests-model* of party exit therefore assumes

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<sup>3</sup> She differentiates between ‘principled’ and ‘pragmatic’ policy domains, the former referring to ideological questions on which parties are expected to take positions and to be punished for betraying their principles, and the latter to performance issues on which positional shifts are unlikely to incur and electoral costs.

<sup>4</sup> See Wildavsky (1965), Key (1966), McLean (1982), Robertson (1976), Aldrich (1983; 1985), Przeworki (1985), Przeworki and Sprague (1986), Chappell and Keych (1986), Kitschelt (1989; 1994),

that when parties change their policies and corresponding ideological position, they should lose votes among people who supported the earlier policy stance or ideological appeal. Parties face a trade-off between appeals to their existing supporters and one to the median voter.

The Labour Party's shift to the centre, both in the period when Tony Blair became leader and then later in government, is generally accepted (Bara and Budge 2001; Hindmoor 2004). The moderation of the Conservative Party over time, shown by content analysis of party manifestos (Bara and Budge 2001), is more contested. Green (forthcoming) demonstrates that both major parties have been perceived by voters to gradually shift position towards the centre. At the same time, the difference between the parties on the issue of European integration has widened, and this has also been documented elsewhere (Evans and Butt 2006). This suggests that party shifts in Britain provide an ideal test of spatial theories.

In order to evaluate the impact of party policy shifts upon the loss of support among previous voters,<sup>5</sup> we should measure party ideological position between time points perceived by party voters at  $t_j$ . We should also compare the self-placement of those same voters across time, since voters may also change ideological position across time, meaning that parties may move away from or towards their previous electoral base. The following tables reveal the mean perceived positions of the Conservative and Labour parties in 1992 and 1997 and then in 1997 and 2001 on two scales, left-right and European Integration, perceived by Conservative and Labour voters respectively who supported the parties at the first time point, also comparing the self-placement of those voters over time on the same scales.<sup>6</sup> Table 1 provides the perceived shifts by Labour voters in 1992 of Labour position between 1992 and 1997 and the same comparison for shifts between 1997 and 2001.

- Table 1 about here -

Between 1992 and 1997 the party was perceived by its previous voters to shift towards the centre, consistent with interpretations of that period, but this shift was towards the mean position of its earlier Labour vote base. The proportion of Labour voters to the left of the party's mean position in 1992 (3.94) was 43.4%, suggesting the mean is a fairly good summary of the distribution. This is particularly true on the left-right dimension where

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Adams and Merrill (1999), Fiorina (1999), Adams (2001; 2001b), McGann (2002), Schofield et al. (2003), Schofield (2004; 2005), Schofield and Sened (2005), Adams et al. (2005; 2006) and Laver (2005).

<sup>5</sup> This paper does not test the impact of party's policy shifts on net vote gains. Further work addresses this question: working paper prepared for the APSA annual meeting, Chicago 2007.

<sup>6</sup> The construction of these scales is discussed in full in the data and methods section.

standard deviations are much smaller than on European Integration, a cross-cutting issue across party support. The mean values for Labour voters between 1992 and 1997 show that Labour didn't desert the majority of its voters between 1992 and 1997 on left-right policy, but the period can be classified as a potential utility gain. However, between 1997 and 2001 the party overtook its voters on the left-right dimension, moving further to the centre than their more stable position in 1997 and 2001. Thus on this dimension the later period represents a shift, albeit a relatively small one, further right than the party's prior vote base. This provides two comparisons; a positive utility gain for Labour voters on left-right issues between 1992 and 1997 and a utility loss between 1997 and 2001.

On the European integration scale, however, the party moves away from its own voters in both earlier time points as it is perceived to shift towards more Europhile positions between both 1992 and 1997 and 1997 and 2001. Labour voters conversely move steadily towards more euro-sceptic positions and so the distance between party and voters grows over time. In the first period the distance between the mean values of the party and its voters increases from 0.43 to 1.04 but in the second the distance increased from 1.10 to 1.74. Thus on this issue two further examples of utility loss can be observed, and the overall loss by 2001 is greatest.<sup>7</sup>

Table 2 provides the comparison of perceived Conservative ideological change with reference to Conservative voters.

- Table 2 about here -

In the first time period the Conservative Party was positioned further from its voters on the left-right dimension than Labour was from its voters on that scale, and the Conservative party was perceived to shift further to the right between 1992 and 1997. Conservative voters conversely shifted towards the centre between 1992 and 1997 (i.e. in the opposite direction to the party), perhaps cued in that period by the Labour party. This period therefore provides a similar comparison to Labour's shift on Europe in Table 1, whereby party and voters diverge and a utility loss can be supposed. However, between 1997 and 2001 on the left-right scale the Conservative Party shifted towards its voters who remained in the same mean location on the left-right dimension between 1997 and 2001, providing an example of a positive utility gain within a spatial model of electoral utilities and party incentives.

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<sup>7</sup> Note that this utility loss will be much greater for some Labour voters than others, given the distribution of preferences on European Integration across Labour party support.

On European Integration the Conservative Party was perceived to move progressively more right-ward towards the euro-sceptic end of the scale between 1992 and 1997 and also between 1997 and 2001. However, its voters also became more eurosceptic in both periods, and the distance between the perceived mean location of the party and its prior voters remained approximately constant. Therefore on Europe we can posit that the policy shifts represent a zero sum utility example, because the distance between the party and its voters remains stable but in the same direction.

A summary of the available cases can be presented as follows.

Utility gains:	Labour 1992 – 1997 left-right Conservative 1997 – 2001 left-right
Utility losses:	Labour 1997 – 2001 left-right Labour 1992 – 1997 EU Labour 1992 – 1997 EU Conservative 1992 – 1997 left-right
Zero sum:	Conservative 1992 – 1997 EU Conservative 1997 – 2001 EU

In line with ideological theories of party competition and voter penalties, these gains and losses in utilities should be expected to result in positive or negative electoral outcomes, and their confirmation would provide support to these theories.

*Options for dealing with disaffection*

Analysis of voter defection tends to compare vote intentions and changes in voting behaviour by comparing voting intention or vote support for a party at one time period with vote switching at a later stage (Clarke et al, 1997; Evans 1999). However, for the disaffected voter several options are available and these can and should be related to how we think about the relative utilities of party strategies. Ware (1995: 155) explains that the utilities to parties of voters who abstain are half as ‘bad’ as the damage to party utilities by voters who switch to rival parties, “It helps you even more if a person who would have voted for the other party now votes for you, but that they are not voting for your opponent is half the benefit”. Thus if a party had the support of a voter at  $t-1$ , that party loses approximately half the electoral support if the same voter abstains at time  $t$  than if the voter defects. Abstention to one party certainly benefits another, but switching benefits the recipient more.

For the voter we can view abstention as a half-way strategy between loyalty and defection. For example, for the voter who has strongly supported or identified with a party, abstaining is a smaller distance moved than rejecting a party in favour of a less preferred alternative.<sup>8</sup> Thus, if a voter wishes to punish a party for policy shifts, or for other reasons, they sustain half the electoral damage by abstaining rather than switching. As such, abstention could be viewed as a form of signalling or ‘voice’ (Hirschman 1970); a more loyal form of protest than exit. This also depends on the context in a particular constituency. If a Labour voter switches their support to the Liberal Democrats in a safe Labour seat but supports the Labour Party when the seat is marginal, their loyalty is greater than if they switch support no matter what. Accordingly, we can think of loyalty, abstention and defection as a hierarchy of electoral penalties, depending on the competitive context.

What does this mean for the impact of party shifts and other evaluations on party utilities and competition theory? Firstly, we should be interested to observe whether our explanations of exit account for voter abstention rather than defection and visa versa, and also if some types of voter are more likely to exhibit one type of ‘lesser’ penalty or a ‘greater’ penalty than other voter groups. Related to this, we might posit that explanations of defection should be more pivotal to understanding party strategies than explanations of abstention, and competitive context should be brought to bear in evaluating the extent of electoral penalties incurred across cases. For these reasons this paper compares explanatory theories across three outcomes; voter loyalty, voter abstention, and voter defection (switching) between  $t-1$  and  $t$ .

Using the same samples as cited above, we can therefore calculate the proportions remaining loyal, abstaining and defecting in comparison with voting for a party at  $t-1$ . Of Labour voters in 1992 (N = 473) 83.0% remained loyal in 1997, 9.3% abstained and 7.7% defected. Of Labour voters in 1997 (N = 749) 66.8% remained loyal in 2001, 17.1% abstained and 16.1% defected. Thus defection and abstention from the Labour party was greater in the second time period when the party moved away from its previous voters on both issue scales, providing an ideal case with which to test an interests-model of party exit using variation on the independent and dependent variables. Of Conservative voters in 1992 (N = 633) 59.2% remained loyal in 1997, 11.0% abstained and 29.9% defected. Of Conservative voters in 1997 (N = 465) 66.4% remained loyal in 2001, 14.8% abstained and 18.8% defected. Thus in the earlier period defections were greater, although the party lost supporters in both. Within an interests-model the earlier defections could be explained with reference to perceived left-right

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<sup>8</sup> Note also that switching to a lesser rival (such as the Liberal Democrats) may also be form of more loyal behaviour than switching to the Conservatives or Labour, particularly depending on the strategic context in a given constituency seat.

shifts, particularly as the Labour party was closer to Conservative voters more centrist position, and again the comparison with a positive utility gain in the latter period, providing an ideal case with which to evaluate the relevance of perceived party shifts, or otherwise, to losses in parties' electoral support.

However, the following section proceeds to question the interests-model against other explanations of defection and abstention, asking whether policy shifts should really matter to electoral outcomes and therefore to the incentives of parties.

### **Alternative Explanations of Voter Disaffection**

There are two relevant criticisms of spatial theories of party competition. The first is the failure of spatial theories to deal with the endogenous relationship between policy preferences and party support, and the second is their over emphasis on the importance of interests to political choices and a failure to accommodate other more important explanations.

The endogenous link between policy preferences and party support means that the connection between policy positions and voting is not simply unidirectional. A voter may support a party because that party shares their position, but a voter may also take an issue position because they support a particular party. The tendency to locate oneself in a similar position to a preferred party is influenced by strength of party identification (Campbell et al. 1960; Himmelweit et al. 1985; Granberg 1985; Heath 1991; Granberg and Holmberg 1988; Aldrich, 1995; Gerber and Green 1999; Green et al. 2002; Whiteley and Seyd 2002; Evans and Andersen 2004). Granberg and Holmberg (1988) list three explanations; (i) rational selection – wherein voters naturally choose to support parties more strongly when they are closer to that party's position, (ii) the influence of the preferred party upon voter self-placement, whereby voters follow the cues of their parties,<sup>9</sup> and (iii) the influence of self-placement on placement of a preferred party – wherein voters place parties close to their own views due to the impact of affect on cognition. Thus for voters who supported a party at an earlier time point, changes in party policy may be mediated by 'conditioning' or 'assimilation' of the party's location at time *t*. This raises questions for the significance of party shifts on changes in party support.

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<sup>9</sup> The likelihood, according to Zaller (1991; 1992) of following a party's cues, will depend on the likelihood of receiving a message (exposure) and the likelihood of accepting a preferred party's message (acceptance) and rejecting another's (rejection).

Furthermore, the relationship between left-right position and vote choice has also declined over the same time span (Sanders 1999; Green and Hobolt, 2006). Although strength of party identification is highly correlated with ideological position, such that stronger supporters tend also to be more polarised (Campbell et al. 1960; Butler and Stokes 1969; 1974; Granberg and Holmberg 1988; Heath et al. 1991), differences between the ideological views of the party identifiers of the Labour and Conservative parties has lessened in recent years (see Green, forthcoming). This suggests that rather than offer a dominant explanation of vote choices and party strategy, an interests-model will have a minimal, if any, effect on voter exit.

$H^0 =$  *An interests-model will not be associated with changes in party loyalty*

In place of an interests-model, alternative explanations should have more relevance.

Particularly among prior party supporters, identifying with a party combined with belonging to a strong class affiliation should play a strong part in a decision to remain loyal or to change party support. Party identification is argued to have an anchoring effect, explained by the important identity-based expressive and solidaristic attachments an individual holds towards a party (Belknap and Campbell 1952; Campbell 1956; Campbell et al. 1960). Imbedded in social networks (Zuckerman 2005), party identification is therefore assumed to be less volatile than instrumental benefits gained from one party at one given time (Schickler and Green 1995; Green et al. 2002). This is not to say that large shifts in reputation cannot result in significant changes in identification. Furthermore, over time, this psycho-sociological model may have weaker predictive power due to dealignment (Särilvik and Crewe 1983) and the changing nature of class identity. However, a psychological and sociological model of party loyalty predicts that the strongest identifiers should be least likely to exit (even though they are also more likely to hold more polarised views) and an individual's social class and party affiliation will play an important role in the decision to defect or remain loyal.

$H^1 =$  *Party identification and social class will be strongly associated with party loyalty*

Whereas the policy shifts model has been dominant in theories of party competition, Clarke et al. (2004) argue that a valence model consistently provides the most dominant explanation of voting behaviour, in particular the centrality of leader evaluations to vote choices. Building on their work, Green and Hobolt (2006) demonstrate that valence judgements of party performance on issues have increased in association to vote choices in British politics, particularly since 1997 when the perceived ideological gap between the major parties narrowed. Thus in this context we might contend that evaluations on performance criteria,

competence or on 'valence' will be far more strongly associated with defection and abstention than changes in policy distance, particularly in recent elections.

$H^2 =$  *A valence model will perform better than all other models in explaining party loyalty and exit*

Given that party exit is viewed hierarchically, as loyalty, abstention or defection, we should also consider the importance of the relative costs or benefits of the decision to turn out to vote and also to defect within the competitive setting. This should be influenced by the number of contending parties, the marginality of contest and the decision to defect or abstain.

The British system is usually held as a classic example of Downsian two-party competition. However, minor parties offer alternatives to voters at the ideological fringe. A significant challenger on the nationalist dimension has been the Referendum Party (1992 and 1997) and the UK Independence Party (UKIP, 2001 and 2005). These parties claim to afford disenchanted right-wing Conservatives an alternative electoral choice and in recent years left-wing alternatives have also made high profile dents into Labour vote shares.<sup>10</sup> In the 2005 general election the Green Party, UKIP and the British National Party gained over one million votes between them, representing 3.9% of the total votes cast. These parties claim to be entering the space left by the major parties. Downs (1957) accepted that parties would face incentives to polarise when voters have more options, such as in multiparty competition when parties correspondingly diverge (Sartori 1976)<sup>11</sup>. If parties exist to steal votes from dominant alternatives, votes can be won and lost at the margins. Thus, we should expect the number of contesting parties in a constituency to be positively associated with the decision to defect.

$H^3 =$  *Defection will be more likely the greater the number of contesting parties per constituency*

However, if a voter wishes to retain their party preference but not switch support they should be less likely to do so in a closely fought election. Hence, the 'safeness' of a seat should be positively associated with abstention and defection, providing another competitive predictor. This would also suggest that defection in safe seats is a more loyal form of 'voice' than

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<sup>10</sup> For example, the success of the Respect Party in the 2005 election in Bethnal Green and Bow, and the growing electoral success (for example, in European Elections) of the Green Party. In local elections, the British National Party has also made inroads, tapping into anti-immigrant sentiment among working class voters on the right of the political spectrum, also fielding parliamentary candidates. Alongside UKIP, in key seats in general elections.

<sup>11</sup> For a helpful test of spatial theories in a two-party and multi-dimensional setting see Iversen (1994).

defection in marginal seats, which can have a greater impact on punishing a previously supported party. Marginality is also indicative of the overall perceived importance or salience of an electoral contest, which should be expected to increase turnout, not only because the voting can make a greater difference for voters but also because the parties will expend more of their efforts in these seats. Hence;

$H^4 =$  *Abstention and defection will be more likely the safer the constituency contest.*

Lastly, Clarke et al. (2006) model the effect of perceived ideological difference between parties on turnout and find it had a positive effect in the 2005 British general election. If the competition is weaker between the parties in terms of choice, voters have weaker incentives to choose one or other alternative since the outcome will matter less the greater the policy similarity between them. Between 1992 and 2001 the mean perceived difference between the two major parties on the left-right dimension decreased and hence we should expect the rational incentives to vote to diminish.<sup>12</sup>

$H^5 =$  *Abstention will be less likely when a difference is perceived between the parties.*

The following section outlines the data and methods employed to test these hypotheses.

## **Data and Methods**

The analysis uses the 1992 – 1997 and 1997 – 2001 British Election Panel Studies.<sup>13</sup> Four multinomial logistic regression models are estimated, two in the first period (one for Labour exit and one for Conservative exit) and two in the second, provides four cases.<sup>14</sup> These data each contain two interviews with the same respondents; at the beginning and end of the electoral cycle, and the latter wave also includes a follow-up questionnaire from which some

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<sup>12</sup> In the 1992 wave of the 1992-1997 BEPS the mean perceived distance between the two major parties on the left-right scale was 4.17 (Std.dev = 3.31, N = 1397), in the first wave of the 1997-2001 BEPS the mean value was 3.46 (Std.dev = 2.79, N = 2825) and in the 2001 wave the value was 2.30 (Std.dev = 2.38, N = 1857). These values were obtained using the full sample of respondents in each case.

<sup>13</sup> The 1992-1997 BEPS sample sizes are smaller due to the fact that issue position scale questions were only asked to a smaller but representative sample of the wider survey. The resulting model sizes are sufficient; N = 205 for Labour and N = 269 for the Conservative model.

<sup>14</sup> The notion of abstention as ‘less bad’ than defection was explored by comparing ordinal models using ordered logit and ordered probit with multinomial logit models. Model fit comparisons are shown in Table A1 in the Appendix. Further information, together with a discussion of tests for the IIA assumption in the multinomial logits can also be found in the Appendix.

measures are taken. Thus we can predict change in electoral behaviour by changes in party evaluations between the 1992 and 1997,  $t-1$  and  $t$ , and then again between 1997 and 2001.

One problem with using panel data to model abstention is the likelihood of underestimation due to attrition among those respondents most likely to abstain. For example, in the 1992 – 1997 BEPS, of those respondents who left the panel in 1997, 81.6% reported that they had voted in the 1992 general election, whereas 92.3% of respondents who remained in all waves reported that they had voted in 1992. Therefore the proportions of abstainers in the panel studies may be underestimated due to panel attrition. The models in this paper use voters who either voted for the Conservative or Labour parties in 1992 and then 1997, and therefore attrition may not pose such a relevant concern. These difficulties should not influence the parameter estimates to great effect, but larger samples of abstainers would be preferable for generalising from the models to the wider population.

The dependent variable is vote choice at  $t$  compared with  $t-1$ , such that 0 = voted for a party at  $t-1$  and also voted for that same party at  $t$ , 1 = voted for the party at  $t-1$  but did not vote at all at  $t$ , and 2 = voted for the party at  $t-1$  and voted for a different party at  $t$ . The models control for age (numeric), a control for general volatility, and gender (0 = male and 1 = female). The independent variables correspond to the four theoretical models:

#### *Interests- model*

The measures reflect an expansive test. Four variables are used. Spatial expectations regarding the impacts of party shifts are tested by two distance measures calculated by the perceived change in location of the party on the left-right scale and the EU scale between  $t-1$  and  $t$ . The left-right measure is a composite average scale of the perceived location of the parties on four issue scales: nationalisation-privatisation, taxation-spending, inflation-unemployment, and equalisation of incomes:

#### Equalisation of Incomes

*1 = 'Make much greater efforts to make people's incomes more equal' to 11 = 'Be much less concerned about how equal people's incomes are'*

#### Nationalisation/Privatisation

*1 = 'Nationalise many more private companies' to 11 = 'Sell off many more nationalised industries'*

## Inflation/Unemployment

*1 = 'Getting people back to work should be the government's top priority' to 11 = 'Keeping prices down should be the government's top priority'*

## Tax/Spend

*1 = 'Government should cut taxes and spend much less on health and social services' to 11 = 'Government should increase taxes a lot and spend much more on health and social services'*

The original coding also included the options 0 = left of 1 and 12 = right of 11, and the scales were recoded to include these responses to create a 1 to 13 interval, maximizing information and sample size. Respondents expressing 'don't know' were recoded at the centre. The four scales are all highly correlated and so combining them overcomes problems of collinearity and is also a theoretically sensible measure of the most important dimension in British voting behaviour. Attitudes and party placements on European integration scale, *Britain should: 1 = 'Do all it can to unite fully with the European Union' to 11 = 'Do all it can to protect its independence from the European Union'* are not highly correlated with the left-right scale (representing an orthogonal dimension in British voting behaviour). Change in perceived party location between  $t$  and  $t-1$  on this scale was included as a separate variable. The two 'change in party location' variables are also not highly correlated.

In addition to the spatial variables, two further variables indicative of a positional evaluation were entered into the models. These were questions one might associate with ideological party support and on which respondents take different views of which is preferable. The first was a question of whether taxes had increased or decreased and the second whether the parties were good for one class or good for all. Tax increases benefit some voters and do not benefit others. Therefore if taxes are thought to have increased or decreased some voters' interests would be met and others might not. Also, the centrality of taxation to the delivery of 'public goods' means it can be incorporated into the interests-model, and in a model of Conservative defection between 1992 and 1995 the variable was found to be significant (Evans 1999). The question and coding is as follows. "Have taxes increased since the last general election?" where 1 = increased a lot, 2 = increased a little, 3 = stayed about the same, 4 = fallen a little, and 5 = fallen a lot. The other measure is the question, "Is the [Labour/Conservative] party good for one class or good for all?" coded 1 = good for one class and 0 = other (responses 'good for all', neither, both and don't know). This measure may reflect a party image evaluation (as argued by Evans 1999) but including them provides as

stringent a test of an interests-model as possible. The variables are taken from the pre-election waves at time  $t$ .

#### *Psycho-sociological model*

Two variables are used to measure the importance of party affiliations through identity; strength of party identification and social class membership. The party identification strength variable is coded 1 = very strong identifier (base category), 2 = fairly strong identifier, and 3 = not very strong, and this variable is taken from the first wave at time  $t-1$ . Social class category is derived from the Heath-Goldthorpe schema where 1 = salariat, 2 = routine non-manual, 3 = petty bourgeoisie, 4 = manual foremen and supervisors and 5 = working class. The observations across the dependent variable are insufficient in the 1992-1997 BEPS samples to include information from the class predictor against party loyalty, abstention and defection. Therefore the class variable is recoded in each model as a binary variable where 1 = working class and 0 = other. The choice of coding makes no difference to the statistical significance of other variables, and using different codings across models would be damaging to our ability to compare effects.

#### *Valence model*

The question, “Is [John Major/Tony Blair/William Hague] a strong and capable leader?” is used to capture leader valence evaluations of the parties, coded 1 = strong and capable, 0 = not capable, both, neither and don’t know.<sup>15</sup> The variable is taken in each case from the pre-election panel wave at time  $t$ . Due to the importance to vote choices of perceived party competence on salient issues (Green and Hobolt 2006) an issue related measure, “Have NHS standards increased since the last general election?” is also used to capture a disaggregated valence notion of issue competence, coded 1 = increased a lot, 2 = increased a little, 3 = stayed about the same, 4 = fallen a little, and 5 = fallen a lot. This measure is very highly correlated with the same question for educational standards. The decision which to omit is somewhat arbitrary but the health variable is used due to its political and measured salience over time. It was also found by Evans to be significant in his model of Conservative attrition between 1992 and 1995. However, this variable can be thought of more generally as a public service performance measure.

Two measures of perceived economic performance are also used, one retrospective and the other prospective. Clarke et al. (1997) use four measures of egocentric and sociotropic evaluations (retrospective and prospective) in their models of Conservative vote loss between

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<sup>15</sup> The question, ‘Would [Tony Blair] make a good Prime Minister?’ was not available in both panel studies.

1992 and 1995, but here the egocentric and sociotropic variables are highly correlated for retrospective and for prospective questions. Therefore one retrospective and one prospective measure was chosen; the combination yielding the best model fits over the four cases; retrospective egocentric (household) economic evaluations and prospective sociotropic (country) ratings. The questions were slightly different in the 1992 – 1997 BEPS compared with the 1997-2001 study. In the earlier study the questions are, “Has household income kept up with prices in the last year?” coded 1 = kept up a lot more than prices, 2 = kept up a little more than prices, 3 = kept up with prices, 4 = fallen behind a little, and 5 = fallen behind a lot, and “Do you think the GB economy will get stronger in the year ahead?” coded 1 = get a lot stronger, 2 = get a little stronger, 3 = stay about the same, 4 = get a little weaker, and 5 = get a lot weaker. In the 1997 – 2001 BEPS the questions are, “Has the financial situation of the household either... 1 = got a lot better, 2 = got a little better, 3 = stayed about the same, 4 = got a little worse, and 5 = got a lot worse, and “Will the general economic situation next year either... 1 = get a lot better, 2 = get a little better, 3 = stay about the same, 4 = get a little worse, and 5 = get a lot worse. The measures were taken in both cases from the last panel wave (pre-election), thereby measuring perceived future economic evaluations according to likely change of government. Finally, a party unity variable is added to further test a broadly defined valence model, worded “Is the [Labour/Conservative] party united nowadays?” coded 1 = united and 0 = divided, both, neither, don’t know. Party unity should be relevant to perceptions of general competence rather than to leaders or to performance on issues.

### *Competition model*

The competition model is tested using three measures; the number of contesting parties in an election, the degree to which a seat is marginal and safe, and the perceived similarity of the parties. The first two measures are obtained from secondary sources, ‘Britain Votes 6’ (Rallings and Thrasher, 1997) and the Official Results of the 2001 general election (Electoral Commission, 2001). The number of contesting parties per constituency was entered by constituency number in both surveys as was the total number of official registered parties in each constituency, ranging from 3 to 10. The measure of marginality was calculated using the % share of vote of the winning party - % share of vote of the second party, such that large values indicate the degree of ‘safeness’.<sup>16</sup> Lastly, a measure of perceived difference between the parties was included in the model. A measure, as used by Clarke et al. (2006), of the difference on issue scales between the two major parties, correlated very highly with

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<sup>16</sup> An alternative would be ‘distance from contention’, measured by subtracting the key party’s vote share (in the relevant party model) from the second party’s share in each constituency, but the former is chosen to represent the overall importance of the constituency contest rather than the likelihood of making a difference to the outcome of one party.

perceived ideological change on the left-right dimension. Therefore an alternative measure “Do the Labour and Conservative parties differ?” was chosen to encompass a more general perception of similarity. This was coded 1 = great difference, and 0 = some difference, not much difference and don’t know.

## **Results**

The results of the multinomial logit models shown in Table 3 reveal comparisons of effects for Labour vote loss in opposition (1992 – 1997) and in government (1997 – 2001).

- Table 3 about here –

Table 3 reveals findings in support of the hypotheses, and for their qualification, and some important differences between the two periods.

The first model supports the null hypothesis. No ideological shifts effects or wider measures of voter interests were significantly associated with abstention or defection relative to remaining loyal. In the second model (1997-2001) two policy effects are found; a reduction in the likelihood of defection when respondents thought that taxes had gone down and an increased likelihood of abstention the greater the perceived change in Labour position on the European scale. Thus, perceptions of changes in taxation appear associated with party defection, suggesting that party voters are instrumental in the connection between their interests and their vote.

Insofar as levels of taxation are synonymous with policy shifts and/or ideological position, we can suggest that party policy decisions play a part in the voter calculus, and this was shown for Labour vote switchers between 1997 and 2001. However, wider ideological shifts were only significant in explaining voter abstention (rather than defection) on the EU scale, suggesting that the Conservative strategy of emphasising a Eurosceptic policy in that period may have had some success in depressing the Labour vote, but not in winning votes away from Labour towards the Conservatives. Thus, ideological shifts mattered to Labour, but not as much as if they had benefited their opponent more directly, and only on the EU scale on which their perceived shift relative to the party’s voters was greatest. This suggests that ideological shifts should enter into the strategic calculus of parties but to a lesser extent (due to the reduced loss in electoral utilities) than more direct impacts of taxation policy. It is therefore useful to distinguish between spatial measures of party position on dimensions,

indicative of ideological changes, and more immediate policy perceptions of voters in terms of taxation.

Significantly, the Labour Party's perceived change in ideological position on the left-right dimension is not significantly related to electoral penalties in either period. This finding strongly contradicts the assumptions of party competition theories, particularly in light of the political salience of those left-right shifts for Labour in the two periods. That the EU shifts were more deleterious to Labour than its left-right shifts suggests two possible explanations. The first is that ideological shifts only damage parties when they result in differences very large between the parties and its voters, suggestive of a 'zone of acquiescence' consistent with directional theory (Rabinowitz and MacDonald 1989). This can be explored by modelling the impacts of large shifts compared with smaller shifts, using a squared term for Labour's EU shift between 1997 and 2001. This quadratic function was not significant. The second is that the EU scale represents a 'principled issue', on which parties are expected to take stable positions rather than responsive ones, in comparison with 'pragmatic issues' on which parties are not punished for being adaptive (Tavits 2007). However, since Labour did not lose voters to other parties on this issue suggests that any implications of electoral penalty for these principled or large ideological shifts should not be overstated.

We can also test whether certain types of more traditional Labour voters were more likely to abstain when they perceived their party to shift on the European policy dimension. The interaction term for working class Labour voters and EU perceived party shifts tests for this possibility, since the Conservatives had hoped to appeal to working class Eurosceptic Labour voters in their 2001 campaign on Europe.<sup>17</sup> However, this interaction term is not significant, suggesting that a more traditional working class Labour voter was not more likely to punish the party for policy shifts. This finding challenges assumptions of party competition theories which assume that the most traditional supporters are more likely to punish parties when they change ideological position.

Three further points can be made in relation to electoral penalties for Labour from 1992 to 2001.

The first is that Labour consistently loses vote support from its working class voters due to abstention, but they are not more likely to give their votes to other parties. This finding is intuitive to our expectations about working class turnout levels, but the findings imply that it

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<sup>17</sup> Interviews with Conservative campaign strategists, 2002 – 2007.

is socio-economic condition that explains Labour's loss of support among its working class voters rather than ideological interests-based abstention.<sup>18</sup> Furthermore, that these voters are not significantly more likely to defect to other parties challenges the notion that core or traditional supporters pose a particular electoral penalty to their parties. The utility loss to Labour among its working class voters will be largely outweighed by their relative loyalty in abstention. The finding amends the second hypothesis; that social class would be strongly associated with party loyalty, in the opposite direction to the expectation.

The second point is that the valence model is particularly important to Labour's loss of support when in government. In both periods, positive ratings of Tony Blair as a strong and capable leader significantly reduce the likelihood of defecting, but between 1997 and 2001 the measures of NHS standards, retrospective economic evaluations and prospective economic evaluations are all significantly associated with abstention and/or defection. Labour was particularly punished by its voters for perceptions of worse standards in the NHS, and also that a punishment or valence model is particularly important in explaining changes in voter loyalty. The issue of health is a Labour 'owned issue' relative to the other parties, and this prior reputation, together with the salience of the NHS for Labour voters, may explain the importance of perceived policy or performance failures between 1997 and 2001 (see Green and Hobolt 2006). Perceptions that the general economic situation would become worse were also associated with both abstention and defection. Together with the importance of leader evaluations in both periods, we find support for the third hypothesis, that a valence model would out perform other explanations, particularly when the Labour party was in government, and therefore more naturally punished for perceived performance failures.

Lastly, there is some support in Table 3 for the hypotheses relating to the competition model. Between 1992 and 1997 Labour voters were more likely to defect the safer the competition in a constituency seat. Controlling for social class, the more marginal the seat, the less likely Labour voters were to defect, confirming the notion that parties can count on their prior voters when they need them most, and challenging the notion of a significant electoral penalty threat among these voters. Between 1992 and 1997 the Labour party had been in opposition for 18 years, and thus it was unlikely that the party would undergo a severe electoral threat from among its own prior voters, but the competition model seems to suggest that voters exhibit more loyal forms of behaviour when it most counts. The number of contesting parties was

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<sup>18</sup> This finding is also borne out by a comparison of the multinomial logit model with a logit model (due to the dependence of the outcome variable categories in this model) examining the choice to remain loyal (1) versus abstention and/or defection (0). The social class variable is no longer significant when these two abstention and defection outcome categories are combined. See Table A2.

significantly associated with defection but in the opposite direction to hypothesised. Rather than increasing the likelihood of defection, a greater number of contestants made this less likely, perhaps due to greater levels of mobilisation, but more minor party contenders did not increase the likelihood of defection, again supporting the assumption that Labour could count on its voters between 1992 and 1997, no matter how many other challengers were in the constituency contest.

In summary, the two models in Table 3 demonstrate that Labour abstention and defection explanations points to the importance of leaders, issue and economic performance, or the notion of ‘valence’, particularly when the party was in government. This supports wider theoretical claims regarding the centrality of valence to voting and party utilities (Clarke et al. 2004; Green and Hobolt 2006). Also important appear to be shorter term policy evaluations, such as those on levels of taxation and public service standards, indicative of policy and/or competence considerations, but also longer term ideological shifts on the European dimension between 1997 and 2001, although only to abstention rather than defection. Left-right shifts, despite their political salience, were not significantly associated with a loss in Labour electoral support between 1992 and 2001. Labour consistently loses working class abstainers, but where voters defect they are less likely to do so in marginal seats. These findings suggest that electoral penalties are strongest on performance measures and on some instrumental changes. On other strategic considerations, such as appealing to core working class Labour voters, or shifting location on left-right and EU dimensions, electoral penalties are relatively minimal, confirming the argument that parties are relatively free to alter their positions vis a vis their previous electoral supporters.

The following table explores these relationships using data on changes in Conservative electoral support between 1992 and 2001.

- Table 4 about here -

Table 4 illustrates interesting similarities and differences in comparison with the Labour models in Table 3.

In support of the null hypothesis, there are no significant findings for the impacts of ideological shifts on the left-right dimension or the European scale on the likelihood of Conservative voting abstention or defection relative to voting Conservative at prior time points. This is particularly striking for the earlier period between 1992 and 1997. In that

period the Conservative party was perceived by its prior voters to become more right-wing, whilst they moved further to the left (Table 2). At the same time, Labour had moved towards these Conservative voters, and yet left-right ideological change is not associated with the dramatic loss of Conservative electoral support between 1992 and 1997. This strongly undermines the spatial model of party shifts and electoral penalties, suggesting that parties are free to move away from their more traditional supporters. However, as with the Labour models, the perception of tax increases/decreases is significant and also evaluations of changes in standards of the NHS. In the Conservative model between 1997 and 2001, Conservative voters were more likely to abstain the greater their perception that taxes had decreased. Since these tax level changes were under a Labour government, abstention can be viewed as a more loyal response than defection to other parties. If Conservative voters in 1992 thought NHS standards had declined by 1997, presumably due to perceptions of Conservative policy failures, they were more likely to abstain in 1997, but not to defect. These findings suggest that the Conservative Party was punished to a lesser extent for performance or record in government between 1992 and 1997 than was Labour by its prior voters between 1997 and 2001.

Also significant in 1992 to 1997 was the perception that the Conservatives were only good for one class, consistent with the analysis of Evans (1999). Evans cites this variable as an image-based predictor, and thus the example may not be illustrative of a policy or interests-based shift, but nevertheless Conservative voters were significantly more likely to defect, rather than abstain, suggesting a more serious electoral penalty to the Conservative Party where it was perceived to be in the interests of one segment of society rather than all.<sup>19</sup> Together these findings provide stronger support to the null hypothesis than for the Labour models of abstention and defection, suggesting that changes in policy and ideological position are perhaps more strongly associated with support for the Labour party than the Conservatives.

With respect to the other hypotheses, the Conservative models support the significance of party identification strength to party loyalty, although not social class (hypothesis 2). The lack of an effect for social class may reflect the dichotomous coding, failing to pick up distinctions between Conservative class support. Between 1997 and 2001 those prior Conservative voters who identified with the party weakly in 1997 were significantly more likely to abstain and defect compared to prior voters who identified strongly with the Conservative Party in 1997. This effect was not significant between 1992 and 1997 when party attachments appeared not to act as ballast against party exit. Between 1997 and 2001 strongly identifying Conservatives

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<sup>19</sup> This variable is not strongly correlated with changes in Conservative left-right position.

were further right wing on the left-right dimension than weakly identifying Conservatives.<sup>20</sup> This challenges the argument that more polarised voters will punish parties for moderating their positions towards the centre, as the Conservative Party was perceived to do so between 1997 and 2001 (Table 2), although the mean left-right position of the strongest identifiers remained more centrist than the overall perceived location of the Conservative Party by 2001. Insofar as the Conservative Party risks losing support from ‘core’ voters, the most important predictors of loyalty over time are age and gender. Younger voters are more likely to abstain in both cases (as they were for the Labour model in 1997 – 2001), and women are less likely to abstain and defect than previous male Conservative voters.

As with the findings in Table 4, the Conservative models support valence explanations of party choice consistent with hypothesis 3, and once again these predictors appear more important when the party was in government, between 1992 and 1997. Thus performance punishments are more likely when parties have records to defend and when voters have information on delivery and competence. If we exclude the unity variable in the second model and classify this effect as indicative of image, the only significant valence predictors between 1997 and 2001 are evaluations of William Hague and sociotropic prospective economic evaluations. Conservative voters believing the future economic strength of the country to get worse after the 1997 and 2001 elections (i.e. under the future Labour governments) were more likely to remain loyal to the Conservatives. Between 1997 and 2001 perceptions of the Conservatives as united or divided were also associated with both abstaining and defecting. As an image variable this can be interpreted in connection with the ‘good for one class or all’ predictor in 1992, suggesting the Conservatives’ main utility calculation between 1992 and 2001 would rationally be with party image, and less so with party competence, at least among prior Conservative voters. This also suggests that the classification of the ‘good for one class’ question and the unity/division variable might be misplaced as measuring interests and competence respectively.

The party competition hypotheses receive limited support in the Conservative models. Conservative voters between 1997 and 2001, as Labour voters between 1992 and 1997, were more likely to defect in safe seats rather than in marginal seats, indicating a more loyal form of electoral penalty and a reduced risk to parties. The number of parties in a constituency showed no effect for Conservative loyalty and exit. In both models and in the models for Conservative and Labour outcomes the variable, ‘is there a difference between the Conservative and Labour parties?’ was not significant.

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<sup>20</sup> The mean left-right position of very strong Conservatives in 1997 was 6.73 (std. dev = 2.35, N = 115) and the mean position of weakly identifying Conservatives was 6.02 (std. dev = 1.70, N = 312).

Contrary to the expectations, the perception of a great difference or otherwise was not associated with a greater or lesser tendency to abstain across the four cases. This finding contradicts other research using an ideological distance-based measure (Clarke et al. 2006). Therefore, these non-findings may reflect the choice of measure. They may also reflect the fact that the models in this paper compare voter abstention with those voters who voted in the previous election and therefore an evaluation of difference between the parties may simply not be relevant to explaining abstention for these respondents. In the binomial logistic regression model of Labour loyalty and exit between 1992 and 1997 the ‘do the Conservative and Labour parties differ’ measure was significant (see Appendix, Table A2), and this suggests that we should be cautious about excluding the importance of this competition variable on the basis of the multinomial models alone.

In summary, the models of Conservative abstention and defection show similar patterns to those for Labour. Party ideological shifts were insignificant across cases, except for perceived changes in taxation levels (and NHS standards between 1992 and 1997, depending on their classification). The valence model performs better than all other models, although negative valence evaluations are more weakly associated with electoral penalties for the Conservative Party, being associated with abstention rather than defection. Party identification strength is significantly related to abstention and defection between 1997 and 2001, whereas social class was to Labour outcomes. Also, the Conservative Party, as the Labour Party, can most likely count on its prior voters in more important marginal electoral contests, suggesting that parties face a lesser electoral penalty when it is more crucial to their electoral outcomes.

## **Discussion**

The patterns of findings for the four models of Labour and Conservative vote loyalty and loss in the two periods show interesting commonalities but also considerable variability. The importance of valence measures is consistent, particularly the ratings of party leaders, but also evident are party specific, context specific and outcome specific factors.

We can isolate factors accounting for party specific choices. For the Labour models these were working class membership and abstention and the relationship of the number of contesting parties to abstention, both only significant in the Labour models. The former finding of working class abstention is highly intuitive, and the number of contested seats may relate to the propensity of greater numbers of candidates to stand in city seats, more heavily

populated by Labour respondents, or to other electoral geography factors associated with Labour seats. For the Labour Party getting out the Labour working class vote will only be pivotal where those voters exist in marginal seats, and the Labour Party between 1992 and 2001 could more readily count on its prior voters to support it where contests were more closely fought. It also appeared that a retrospective punishment explanation of vote loss was more closely associated with Labour defection than it was the Conservatives, with Labour voters more likely to defect and Conservatives more likely to abstain when evaluations on public services and the economy were more negative. This could be explained by greater performance failures under the Labour government in 1997-2001 than the Conservative government in 1992-1997, although this would seem unlikely given the large degree of Conservative disaffection prior to 1997 compared with much lower disaffection towards Labour in its first period of government. The Conservative Party was more often punished by its prior voters on image-related evaluations; 'good for one class' or either divided or united. Additionally, specific to the Conservative Party models were age, gender, and party identification strength of respondent. This suggests that whilst a class model is a stronger account of the Labour core vote, party affiliation is a stronger model of Conservative support. That the strongest identifiers were least likely to abstain or defect their vote from the Conservatives between 1997 and 2001, is indicative of the importance to that party of their ageing support base but also to the impact of partisan ties. Replacing a generation of 'true blue' Conservatives and improving the party's image are thus priorities for Project Cameron.

Also specific to choice were differences between explanations of abstention and defection for incumbent parties relative to oppositions. Thus evaluations of NHS standards and retrospective evaluations of personal or household economic conditions served as important punishment models for governing parties, stronger for Labour than the Conservatives, but they did not relate at all to evaluations of opposition parties. This again is intuitive but nevertheless relevant to understanding the utility losses of governing parties vis a vis their rivals. Opposition parties should seek to damage the reputations of the incumbent, but cannot expect to lose existing support by their own ratings on these issues. Also common to opposition models was the relevance of competitive context. Only for Labour in 1997-2001 and the Conservatives in 1992-1997 was the marginality of seat significantly related to the decision to defect (expressing loyalty), suggesting that disaffected voters use the option of voting for other parties (i.e. incumbents) when their own party is not in government and where voting for their party or not makes no difference to the status quo.

We can also ascertain which factors are specific to outcomes, at least in the four cases examined. In order to generalise many more cases would be needed, but specific in this study

were age to the likelihood of abstention and leader ratings and marginality to the likelihood of defection. In all models the most consistent effect for prior voter loyalty or exit in later elections is the ratings of the party leader. Therefore, to better understand party loyalty, it appears that above all instrumental theories of voter preferences, leaders matter by far the most. If you supported a party in the past, your evaluations of the leader determine the likelihood of your support in the future.

These context and outcome specific findings offer modifications to the hypotheses. The null hypothesis, that ideological changes would not be associated with changes in party support, was supported in all cases except for Labour's shift on European integration. In this case, a more Europhile position was associated with abstention but not defection, thereby penalising Labour but not as greatly as if its opponents had more directly benefited. The psychosociological model was supported differently for both parties; a class model being associated with Labour vote and a party identification strength model associated with the Conservatives. Likewise, although the valence model was the most powerful across the cases, penalties to the Labour party were more severe than to the Conservatives, and for both parties in government rather than opposition. Overall the party competition model provided a useful explanation of outcomes for opposition parties, influencing the likelihood of defection in safer seats for Labour and Conservative voters, and mediating electoral penalties accordingly. This latter finding was particularly relevant to the choice of outcome variable as a hierarchical penalty, and this conceptualisation has also informed the evaluation of electoral penalties as potentially more serious than others. Whilst we would not wish to assume that the predictors evaluated here are only ever associated with one outcome, we can posit that different electoral penalties are accrued in a given context which alter the cost-benefit calculation of strategic decisions to political parties. Utility theories of party competition should approximate these different considerations.

Two further empirical and theoretical implications can be suggested. The first is that long-term ideological shifts central to spatial theories of party competition are only rarely and weakly associated with electoral penalties. This suggests that parties can adapt their ideologies without concern for losing their previous voters. However, several policy outcome effects were shown in the analysis, and these policy questions such as taxation increases, falling NHS standards, and evaluations of personal economic circumstances, although commonly used as performance of 'record in government' measures, also tell us something about shorter term policy evaluations and their importance. This may suggest that while long-term spatial positioning matters little, voters remain highly responsive to what parties say and do and that a form of policy responsiveness is highly relevant to party utilities. Therefore, the

meaning of policy outcome and evaluation questions require further thought as to their empirical meaning and therefore to any theoretical consequences. The second implication is derived from the fact that this paper has found little evidence in support of the ‘core vote’ argument for party policy consistency or electoral penalties in adaptation. This would suggest that certain voters are particularly pivotal to parties and their exit or ‘voice’ (e.g. abstention) is particularly harmful to parties and formative upon strategy. In the absence of ideological shift effects, except for Labour’s EU repositioning between 1997 and 2001, we do not find that some voters defect or abstain on the basis of these shifts more than others. In the case of Labour, the available interaction term was not significant. Labour risks losing its working class voters to low turnout, and the Conservatives risk losing their weakest identifiers, but in each case the arguments refute the notion parties should rationally diverge in ideological terms towards their most ideological voters. Thus spatial explanations for ideology based on traditional party voters are challenged in this paper.

## **Conclusions**

At the outset of this paper the question was asked, ‘Are parties free to shift their ideological positions or are they constrained by the views of past voters?’ This question has been evaluated by examining the extent to which party shifts result in loss to former electoral support, either by abstention, which is argued to be a less serious penalty for a party, or by defection to other parties. In order to evaluate theories of party competition the analysis compared policy shifts or spatial models of electoral penalties with psycho-sociological, valence and party competition models. If one theory of party competition is more persuasive, we should see its explanatory power outperform others across the four cases, and the valence model appears to do so, particularly for the cases in which either the Labour or Conservative party was the incumbent party. Therefore, the hypothesis that changes in ideological position would not predict changes in party loyalty was confirmed. These findings strongly challenge the dominance of spatial theories of party competition, such as those arguing that parties diverge due to the more polarised preferences of their voters, and instead point to the relevance of valence theories of voting. Given the dominance of valence models of voting behaviour, it is noticeable that comparable theories of party competition are undeveloped, although the dominance principle (Riker 1986), the saliency theory (Budge and Farlie 1983) and the issue ownership theory (Petrocik 1993) are notable exceptions. This paper points to the importance of testing and further formalising these theories (see Green, forthcoming; Green and Hobolt 2006).

However, this paper has also revealed that short term policy evaluations do matter to prior vote support on public service issues and perceived levels of taxation. Thus parties are correct to be concerned with electoral penalties associated with high taxation and declining standards in the National Health Service. Of course, to support high standards in the NHS is not a position issue but a valence issue (Stokes 1963); no voters can be argued to wish for falling standards, and as such this issue has been classified also as a measure of competence. Nevertheless, whilst traditional spatial theories are challenged in this paper, policies are undoubtedly relevant to the loss of prior voters from one electoral cycle to another.

The main implications for theories of party competition are threefold. The first implication is that spatial theories assuming that parties should maintain ideological positions closer to their prior supporters are not confirmed. Perceptions of Labour shifts on European Integration were associated with a greater likelihood of abstention between 1997 and 2001, but this penalty is argued to be of lesser importance compared to evaluations resulting in defection, and no other shifts were significant, even those on the left-right dimension for both parties in both periods. The second implication is that the application of theoretical explanations is largely context and choice specific. Predictors of Labour penalties differed somewhat from Conservative penalties across cases, and predictors for incumbents also differed for those for the parties in opposition. Therefore we should be wary of adopting a 'one size fits all' explanation of voting behaviour and party strategies across cases. The third implication is that conceptualising electoral penalties as hierarchical allows us to better understand the contextual nature of voter disaffection and the rationale of parties in evaluating strategic impacts. Decisions to abstain can in some cases be viewed as more loyal than those to defect (such as when a rival party performs well), but in other cases the decision to defect is also loyal (such as when a contest in an individual's constituency is safe rather than marginal). In this respect parties can count on their previous voters when they need them most. Therefore, much less than previous voters constraining parties strategically, these conclusions imply that parties are far freer to moderate their ideological positions than previously assumed. However, this paper has tested the impact of British party strategies and voter evaluations of parties on the loss of prior vote support but it has not evaluated the impact on potential vote gains. If parties neither significantly win votes nor lose votes when they adapt their ideological position then the applications of spatial theories of party competition are even further undermined. Future research should therefore address the second part of this question.

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## Tables

**Table 1: Mean perceived location (standard deviations) of the Labour Party by Labour voters in 1992 and 1997 and self-placement of Labour voters on the left-right and EU dimensions, British Election Panel Studies, 1992 – 1997, 1997 – 2001**

		<b>1992</b>	<b>1997</b>	<b>1997</b>	<b>2001</b>
<b>Left-right</b>	Party	3.94 (1.43)	4.42 (1.46)	4.6 (1.60)	4.91 (1.66)
	Voters	4.28 (1.53)	4.37 (1.41)	4.58 (1.63)	4.6 (1.68)
<b>EU</b>	Party	6.02 (3.03)	5.66 (2.68)	5.89 (2.74)	5.49 (2.52)
	Voters	6.45 (3.62)	6.7 (3.44)	6.91 (3.46)	7.23 (3.35)
<b>N</b>		<b>403</b>	<b>412</b>	<b>1069</b>	<b>709</b>

**Table 2: Mean perceived location (standard deviations) of the Conservative Party by Conservative voters in 1992 and 1997 and self-placement of Conservative voters on the left-right and EU dimensions, British Election Panel Studies 1992 – 1997, 1997 – 2001**

		<b>1992</b>	<b>1997</b>	<b>1997</b>	<b>2001</b>
<b>Left-right</b>	Party	7.84 (2.13)	8.12 (1.97)	7.51 (2.06)	7.01 (1.99)
	Voters	6.64 (1.92)	6.27 (1.76)	6.31 (1.84)	6.3 (2.03)
<b>EU</b>	Party	6.65 (3.03)	7.78 (2.60)	7.81 (2.93)	8.73 (2.49)
	Voters	7.5 (3.35)	8.79 (2.92)	8.77 (3.11)	9.11 (2.82)
<b>N</b>		<b>545</b>	<b>569</b>	<b>623</b>	<b>448</b>

**Table 3: Multinomial logit models of Labour loyalty, abstention and defection in 1992 – 1997 and 1997 – 2001, British Election Panel Studies**

	1992 - 1997		1997 – 2001	
	<i>Loyal/abstain</i>	<i>Loyal/defect</i>	<i>Loyal/abstain</i>	<i>Loyal/defect</i>
Constant	1.91 (3.21)	-1.56 (3.70)	-1.11 (1.20)	-1.82 (1.26)
<i>Control variables</i>				
Age	-0.01 (0.02)	.03 (0.02)	<b>-0.04 ***</b> (.01)	-0.01 (0.01)
Gender	0.01 (0.53)	-0.40 (0.75)	.00 (0.24)	.04 (0.25)
<i>Psycho-Sociological Model</i>				
Weak party identification	0.51 (0.75)	-0.03 (1.10)	0.29 (0.35)	0.22 (0.36)
Fairly strong party id	0.12 (0.72)	-0.20 (0.94)	0.23 (0.31)	0.24 (0.31)
Very strong party id	.	.	.	.
Working class (1/0)	<b>1.69 **</b> (0.64)	-1.69 (0.90)	<b>0.73 **</b> (0.28)	-0.19 (0.27)
<i>Ideological Shifts Model</i>				
Labour LR change	-0.13 (0.16)	-0.15 (0.24)	0.10 (0.06)	0.03 (0.06)
Labour EU change	0.05 (0.06)	-0.00 (0.11)	<b>0.14 **</b> (0.05)	0.04 (0.05)
Taxes (gone down)	-0.29 (0.20)	0.11 (0.28)	-0.05 (0.11)	<b>-0.35 **</b> (0.12)
LP good for one class	-0.47 (0.93)	-0.92 (1.66)	0.46 (0.53)	-0.58 (0.54)
Lab EU change * w.class	-	-	0.05 (0.07)	0.03 (0.07)
<i>Valence Model</i>				
Leader capable/strong	-1.06 (1.05)	<b>-3.15 *</b> (1.30)	<b>-1.16 ***</b> (0.36)	<b>-0.90 *</b> (0.37)
NHS standards lower	-0.36 (0.30)	-0.52 (0.48)	<b>0.25 *</b> (0.12)	<b>0.39 ***</b> (0.12)
HH retrospective worse	0.08 (0.23)	-0.36 (0.36)	0.08 (0.13)	<b>0.34 *</b> (0.13)
GB prospective worse	<b>0.42 *</b> (0.18)	0.24 (0.27)	<b>0.30 *</b> (0.13)	<b>0.34 *</b> (0.13)
LP united	0.83 (1.44)	-0.31 (1.68)	-0.28 (0.29)	-0.43 (0.29)
<i>Competition Model</i>				
Safeness of seat	0.01 (0.01)	<b>0.06 **</b> (0.02)	-0.00 (0.01)	-0.01 (0.01)
Number of parties	<b>-0.66 *</b> (0.26)	0.08 (0.28)	0.02 (0.10)	-0.05 (0.10)
Difference CP/LP	-0.55 (0.54)	-0.65 (0.86)	0.00 (0.17)	-0.06 (0.18)
Chi <sup>2</sup>		62.57 **		170.80 ***
Log likelihood		-91.41		-483.32
Pseudo R <sup>2</sup>		0.25		0.15
N		205		693

\* p < 0.05; \*\* p < 0.01; \*\*\* p < 0.005

**Table 4: Multinomial logit models of Conservative loyalty, abstention and defection in 1992 – 1997 and 1997 – 2001, British Election Panel Studies**

	1992 - 1997		1997 – 2001	
	<i>Loyal/abstain</i>	<i>Loyal/defect</i>	<i>Loyal/abstain</i>	<i>Loyal/defect</i>
Constant	4.75 (2.25)	1.20 (1.69)	0.69 (1.45)	1.28 (1.48)
<i>Control variables</i>				
Age	<b>-0.06 ***</b> (0.02)	-0.02 (0.01)	<b>-0.02 **</b> (0.01)	<b>-0.04 ***</b> (0.01)
Gender	<b>-1.16 *</b> (0.51)	0.14 (0.36)	<b>-0.79 **</b> (0.32)	-0.03 (0.32)
<i>Psycho-Sociological Model</i>				
Weak party identification	-0.44 (0.78)	0.99 (0.52)	<b>1.29 **</b> (0.48)	<b>1.77 **</b> (0.61)
Fairly strong party id	-0.25 (0.57)	0.10 (0.46)	-0.266 (0.48)	0.77 (0.59)
Very strong party id	.	.	.	.
Working class (1/0)	0.41 (0.51)	0.38 (0.40)	0.78 (0.36)	0.18 (0.40)
<i>Ideological Shifts Model</i>				
Conservative LR change	0.12 (0.11)	0.11 (0.08)	0.00 (0.07)	0.03 (0.07)
Conservative EU change	-0.02 (0.06)	-0.02 (0.04)	-0.00 (0.04)	-0.02 (0.04)
Taxes (gone down)	0.05 (0.21)	-0.30 (0.16)	<b>0.35 *</b> (0.14)	0.18 (0.15)
CP good for one class	0.60 (0.51)	<b>1.27 ***</b> (0.37)	-0.17 (0.37)	0.39 (0.35)
<i>Valence Model</i>				
Leader capable/strong	-0.03 (0.48)	<b>-0.97 *</b> (0.39)	-0.55 (0.32)	<b>-0.82 *</b> (0.34)
NHS standards lower	<b>0.51 *</b> (0.23)	0.19 (0.15)	-0.17 (0.16)	-0.25 (0.15)
HH retrospective worse	<b>0.63 *</b> (0.31)	0.25 (0.22)	0.12 (0.17)	-0.33 (0.18)
GB prospective worse	-0.19 (0.20)	<b>-0.39 **</b> (0.15)	-0.00 (0.17)	<b>-0.33 *</b> (0.17)
CP united	-1.60 (1.19)	-0.77 (0.94)	<b>-0.78 *</b> (0.33)	<b>-1.87***</b> (0.37)
<i>Competition Model</i>				
Safeness of seat	0.00 (0.01)	0.01 (0.01)	0.01 (0.01)	<b>0.05 ***</b> (0.01)
Number of parties	-0.35 (0.21)	-0.04 (0.14)	-0.12 (0.14)	0.07 (0.13)
Difference CP/LP	-0.82 (0.73)	0.31 (0.45)	0.10 (0.20)	0.35 (0.22)
Chi <sup>2</sup>	126.38 ***		166.36 ***	
Log likelihood	-185.55		-289.30	
Pseudo R <sup>2</sup>	0.25		0.22	
N	269		458	

\* p < 0.05; \*\* p < 0.01; \*\*\* p < 0.005

## Appendix

The first step of analysis compared the model fit across three stages of preliminary analysis of the dependent variable as a categorical and ordinal outcome, since I classify abstention as a 'lesser penalty' than defection. There are issues relating to each classification. As a categorical outcome the analysis risks comparing categories which are in fact dependent on each other and better viewed as a hierarchical choice, whereas an ordinal model should have more power and efficiency. Unless the ordinal models are more efficient, the multinomial analysis should be preferable as long as the IIA assumption is not violated. The following table compares the model fit for each model type in the party specific cases.

**Table A1: Model Fit Comparisons for Labour and Conservative loyalty, abstention and defection models, 1992 and 1997 and 1997 and 2001**

	1992 - 1997			1997 - 2001		
	-2LL	Chi <sup>2</sup> (df)	Pseudo R <sup>2</sup>	-2LL	Chi <sup>2</sup>	Pseudo R <sup>2</sup>
<i>Conservative models</i>						
Ordered logit	-202.14	93.20 *** (17)	0.19	-304.99	134.96 *** (17)	0.18
Multinomial logit	-185.55	126.38 *** (34)	0.25	-289.30	166.36 *** (34)	0.22
<i>N</i>		<b>269</b>			<b>458</b>	
<i>Labour models</i>						
Ordered logit	-104.24	36.90 ** (17)	0.15	-507.19	123.05 *** (17)	0.11
Multinomial logit	-91.41	62.57 *** (34)	0.25	-483.55	170.35 *** (34)	0.15
<i>N</i>		<b>205</b>			<b>693</b>	

Note: Ordered probit and ordered logit models were also compared but these showed no significant differences.

Table A1 indicates that the multinomial models are preferable to treating the dependent variable as an ordinal response. Comparing the pseudo R<sup>2</sup> values and log likelihoods, the multinomial logit models outperform in all four cases. Given that multinomial logit is a less restrictive model this should be so, and therefore these tests only act as a rough guide. The

multinomial logit models are also evaluated in light of post estimation tests for the independence of irrelevant alternatives and in three cases a Hausman test confirmed that errors were uncorrelated (Conservative model 1992-1997 and both models 1997-2001). These tests may simply confirm that the models account for all systematic error variance and that the choices remain dependent. However, multinomial logit remains the preferable choice across the majority of cases. In the case of the Labour model (1992-1997), the error correlation may occur due to the much reduced sample size in that period. However, a binomial logistic regression model was also estimated for verification, and this can be found in Table A2.

**Table A2: Logistic regression model of Labour loyalty and exit in 1992 – 1997, British Election Panel Study**

	<i>Loyalty/Exit</i>	
	<i>B</i>	<i>Std.Error</i>
Constant	1.33	2.31
<i>Control variables</i>		
Age	0.01	0.01
Gender	-0.07	0.45
<i>Psycho-Sociological Model</i>		
Weak party identification	-0.14	0.63
Fairly strong party id	-0.15	0.60
Very strong party id		
Working class (1/0)	0.62	0.49
<i>Ideological Shifts Model</i>		
Labour LR change	-0.11	0.12
Labour EU change	0.03	0.06
Taxes (gone down)	-0.16	0.19
LP good for one class	-0.23	0.79
<i>Valence Model</i>		
Leader capable/strong	<b>-1.70 *</b>	<b>0.86</b>
NHS standards lower	-0.29	0.25
HH retrospective worse	0.14	0.17
GB prospective worse	<b>0.46 ***</b>	<b>0.15</b>
LP united	0.57	0.89
<i>Competition Model</i>		
Safeness of seat	<b>0.03 **</b>	<b>0.01</b>
Number of parties	-0.40	0.25
Difference CP/LP	<b>-0.97 *</b>	<b>0.47</b>
Chi <sup>2</sup>		33.07 *
Log likelihood		-80.89
Pseudo R <sup>2</sup>		0.19
N		205

p < 0.05; \*\* p < 0.01; \*\*\* p < 0.005

The findings are comparable to the multinomial logit model with the exception that class differences are not found when abstention and defection are combined in the outcome variable, and the 'do the Conservative and Labour parties' differ variable is significant in place of the number of contesting parties.