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BMG's Value & Identity Clans of Great Britain

The Broken Coalition:

The 2024 Election and Sunak's Clan Crisis

Robert Struthers - Head of Public Perceptions I June 2024

Foreword by Professor Paula Surridge

Foreword

At the 2019 general election, Boris Johnson and the Conservative party were able to forge a coalition of voters from very different parts of the electorate. Using these fragments of the electorate a 'Get Brexit Done' picture was formed. But the fault lines that crossed that coalition remained. Should Keir Starmer and Labour manage to create a new picture of 'Change' from those fragments in 2024, the same will be true.

Understanding those fragments and how to avoid a coalition splitting along those fault lines is crucial to winning elections in the 21st century, with an electorate no longer held in place by strong ties to political parties.

The Values and Identity Clans, pioneered by BMG in the run up to the 2019 election, provide us with a strong framework for understanding these fragments. Identifying 10 groups among the electorate based on their economic, social and political values, this report shows us how these groups have changes in their responses to politics and the political parties since the 2017 election.

Not only does this approach help us to understand the changing fortunes of the major political parties and who might form the next government, they are also particularly useful for understanding the groups where the dynamics of party competition vary.

In 2019, I identified one of the key Clans the Proud and Patriotic State Clan as a group that was 'cross-pressured' favouring broadly left-wing economic policy but also socially conservative, without a party that represented their set of values. In 2024, we can see how this Clan continues to be cross-pressured impacting the nature of party competition as it becomes a three-way contest among the Conservatives, Labour, and Reform UK – all on roughly 30% of the vote in this large Clan in which 7 in 10 voted for the Conservatives in 2019.

The dynamic within this single Clan perfectly encapsulates the challenge for the Conservatives in 2024. Voters who are particularly concerned about the cost of living and public services are being lost to the Labour party while those most concerned about immigration are being lost to Reform UK.

Keeping a close watch on how each of the Clans have changed their preferences since 2019 will be critical for understanding both the 2024 election result and the challenges a new government will face in holding its own newly forged coalition of voters together.

Professor Paula Surridge

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BMG's Value & Identity Clans: A Superior Analysis Framework for British Politics

Back in 2018, BMG released a landmark segmentation model that focused on identifying underlying, like-minded values groups. Based on profiling information from more than twenty-seven thousand adults living in Britain, our early analysis shows that 10 distinct 'clans' of people with shared values exist in the UK.

Each Clan is more similar internally and less like others While there are demographic differences among the Clans, they are stronger predictors of outcomes than traditional markers.

These Clans reveal the divides that define modern social and voting behaviour in Britain more precisely than ever before. By identifying someone's clanship, we can better predict political change and understand why the parties might be pursuing their current policies and messaging.

Though admirable, political analysis that focuses on one spectrum, i.e. left vs. right, authoritarian vs libertarian, open vs. closed, or even localism vs cosmopolitanism, is often overly simplistic and fails to capture the nuance of how people think about political issues and vote. Our Clans are a more accurate tool for understanding the complex society that we live in.

Over the last two years, we have adapted and refined our model, including tweaking our segmentation questions and updating our clan descriptions. We've collaborated with various clients using this segmentation, and this year, as part of our partnership on election polling with The i Newspaper, we will be publicly releasing more of this analysis.

This first release offers a comprehensive overview of the political landscape in 2024 as the campaign begins. At points in the report, you will see we have mapped out the story when it comes to Values and Identity Clans at four important moments:

1. The 2017 General Election
2. The 2019 General Election
3. The final months of Boris Johnson's time in power and Liz Truss's brief time as PM (average of polls conducted in June, July, and October 2022)
4. The here and now – the beginning of the 2024 General Election campaign.

In doing so, we explore how the fragmented coalition has contributed to Rishi Sunak's current polling predicament. Subsequent releases will follow throughout the campaign.

'Clan'. Noun.
A group of people with a strong common interest.

Meet the Clans (1)

Leave Coalition Clans

	Clan Sizes
Sovereign Tradition: Combine support for a small state and low taxation with 'small c' conservative views on social issues, immigration and family life. Members of the ST Clan are strong supporters of traditional British institutions such as the Royal Family and tend to celebrate Britain's colonial heritage.	7%
Proud & Patriotic State: Tend to be in favour of redistribution of wealth and nationalisation of key industries, with a strong opposition to the emergence of multiculturalism and freedom of movement. PPS Clan members could be characterised as patriotic people with socialist stances on the economy.	13%

The Swing Clans

The Measured Middle: Have middling social views, with fairly high numbers opposed to open borders and multiculturalism. On social issues, they are fairly liberal, believing more needs to be done in order to achieve gender and LGBT equality, but are more conflicted on issues such as adolescents choosing their own gender identity.	5%
Modern Working Life: Are strong believers in the value of hard work and social mobility, supporting the view that it is always possible to achieve your goals, so long as you work hard. On balance the clanship believe individuals, not others, should be responsible for their own financial well-being, and tend to hold liberal views on the environment, LGBT rights and gender equality.	4%
Strength & Respect: Favour authority and discipline, favouring a 'just desserts' approach to crime and punishment. They prefer a strong and often uncompromising state, which extends to areas such as defence and Britain's place in the world. In most other areas of social and economic policy, members tend to have mixed or middling views.	5%

Meet the Clans (2)

Liberal & One Nation Clans

Clan Sizes

One Nation Modernisers: One of the most pro-business Clans. Mixing a modern form of conservatism on the environment and society with traditional views on family life and British institutions. 'Moderniser' is a reference to the Conservative party 'modernization' project under David Cameron and George Osborne.

8%

Liberal Progress: Clan members combine relatively balanced views on the economy with liberal views on society and immigration. Liberal Progress clan members are supportive of free trade, free movement of people, and multiculturalism. They are the group that can most reasonably be described as the core voting Clan of the Liberal Democrats.

9%

Left & Social Democracy Clans

Common Sense Solidarity: Members of this Clan are very strong supporters of renationalisation and trade unions and believe firmly in the redistribution of wealth via taxation. The CSS Clan is fairly comfortable with immigration and has mixed views on a number of social issues, such as welfare, human rights, and parenting.

14%

Green Global Community: Clan members combine socialist views on the economy, with liberal and environmentalist stances on social issues. Their version of socialism has distinctly environmentalist overtones. Members have a strong civic interpretation of Britishness, little interest in the nation-state and want governments to pursue an ethical and inclusive foreign policy.

11%

Apathy

Apathy: Members of the Apathy Clan are generally disinterested and disengaged with politics, with very few strong views on many issues. They are unlikely to have given much thought to most economic, political and societal questions, either because they are simply not interested, or because they feel alienated by the current state of our politics.

24%

Summary of report conclusions (1)

1. **Johnson's fragile 2019 clan coalition:** Boris Johnson built an extraordinary coalition of voters that took him to his 2019 majority. Built on a leave-voting foundation, his coalition was able to reach a disparate set of Clans with contrasting values and outlook, which, by its very nature, was extremely fragile.

2. **The coalition in crisis:** The Conservative coalition was fundamentally weakened by Boris Johnson and shattered by Liz Truss, and Rishi Sunak has not yet shown any evidence of being able to repair it. Indeed, in several key Clans, the picture has gotten worse since Rishi Sunak took the reins.

3. **Labour's comeback with the Proud & Patriotic State Clan:** Labour has splintered the Leave Coalition Clans and made considerable ground with the Productive & Patriotic State voters. Clan members here hold socialist economic views but strongly socially conservative views, particularly on immigration. Rishi Sunak's personal ratings are languishing among members of this Clan.

4. **Swing Clan voters are flocking to Labour:** Labour has also swung the 'swing Clans'. Labour strategy and positioning have clearly paid dividends with voters in the Modern Working Life, Measured Middle, and Strength & Respect Clans. Yes, Conservative own goals have played a significant part in their downfall, but Keir Starmer's rigid focus on the values of these voters will have paid significant dividends too.

5. **Labour's left flank is largely sticking with Starmer:** There is just one Clan that Labour has failed to make inroads with: the Green Global Community Clan. This is the most economically left-wing, environmentalist and internationalist Clan that stood by Jeremy Corbyn in 2019. While Labour hasn't improved on their already high 2019 share with this Clan, importantly, they haven't lost much ground either.

Summary of report conclusions (2)

6 **The Liberal Democrats are gaining with the One Nation Modernisers:** While the Liberal Democrat vote share looks stable on the surface, their growth in one Clan should worry the Conservatives: The One Nation Modernisers. This adds further evidence that the Liberal Democrats appeal is becoming more targeted, picking up votes from more moderate Conservative voters who embody the voters they want to reach in the so-called “Blue Wall”.

7 **Reform UK could deal a knock-out blow to the Conservatives:** Reform UK has gained significant support from both sides of the Leave coalition: the Sovereign Tradition and Proud & Patriotic State voters. Despite having drastically different views on the economy, wealth, and redistribution, Reform UK has brought these groups together, largely based on their immigration and border policy positions. Nigel Farage has significant appeal in both Clans.

8 **Labour should heed the cautionary tale of the 2019 Conservative coalition:** Labour is on the verge of building a coalition as broad as the Conservative's 2019 coalition, but it could be equally fragile if they enter government. Many of their new voters have come from Clans with socially conservative on issues like immigration, welfare, and defence and arguably align positions many would typically associate with the Conservative Party. Labour must work hard to keep them onside to avoid the Conservatives' fate post-2019.

9 **A tale of two policies:** Two headline-grabbing policies perfectly illustrates the state of the campaign. The National Service policy, while not popular nationally, resonates with voters in the Sovereign Tradition and Proud & Patriotic State Clans, as well as some key swing Clans. It is designed to limit losses rather than win outright, indicative of the Conservative party’s defensive strategy. Meanwhile, Labour's GB Energy policy unites Clans divided by the Tory National Service proposition. Members of the Green Global Community and Proud & Patriotic State both strongly support the policy, which mixes nationalistic framing with a focus on clean energy. It's a perfect example of a policy designed to keep Labour's coalition together.

In 2019, Boris Johnson assembled a broad but fragile coalition

Boris Johnson's 2019 coalition was impressive. He brought together a diverse set of Clans and won a significant majority by appealing to voters with different values. In clan terms, this coalition can be understood in three parts:

1. **Securing a pro-Leave foundation:** Boris Johnson united the economically right-wing and socially conservative Clans like the Sovereign Tradition with economically left-wing yet socially conservative groups like the Proud & Patriotic State Clan – both of which overwhelmingly voted to leave the EU. While Proud & Patriotic State Clan members voted in decent numbers for Labour in 2017 (32% Labour & 45% Conservative), their support for Labour collapsed as the Conservatives appealed to their more socially conservative and pro-Brexit instincts (14% Labour & 69% Conservative).

2. **Winning over the swing Clans:** Boris Johnson won over the 'swing Clans'. Members of these groups tend to have less strongly entrenched views on Brexit even if they hold some socially conservative views. Rather than talking up the merits of Brexit or otherwise, the 2019 strategy of "getting Brexit done", combined with a growing dislike for Jeremy Corbyn, will have been key to winning over these groups. The Modern Working Life Clan is a case in point. In 2017, this Clan was evenly balanced, but by 2019, the Conservatives had opened a 33-point lead within this group.[1]

3. **Keeping less aligned Clans onside:** While building support more closely aligned in values terms to the instincts of the vote leave team, critical to the 2019 majority was retaining the support of groups less enthusiastic about leaving the EU, like the One Nation Modernisers and the Liberal Progress Clan. By emphasising moving forward after Brexit and highlighting what they argued was the threat of a Jeremy Corbyn premiership, the Conservatives maintained decent levels of support among these more socially liberal and cosmopolitan groups.

Accordingly, a perfect storm of circumstances, including Brexit realignment, opposition to Jeremy Corbyn, and a compelling campaign message, enabled the Conservatives to secure a strong majority. However, this disparate set of Clans, often with competing visions and priorities for Britain, would need skilled and effective stewardship if the coalition could be relied on again for future electoral success.

[1]The swing Clans of Modern Working Life, Strength and Respect, and the Measured Middle, along with the Proud & Patriotic State Clan (which unusually shifted blue in 2019), represent votes often discussed as being disproportionately located in 'red wall' seats.

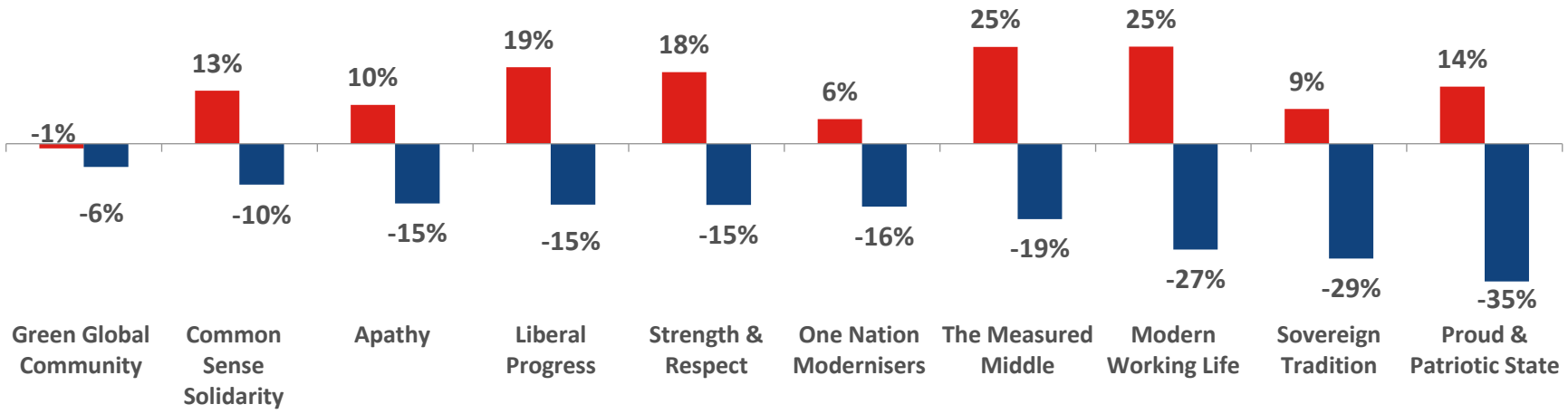
Under Johnson and then Truss, the fragile coalition collapsed

Rishi Sunak goes into this election significantly behind in the polls. However, it should not be forgotten that his predecessors played a significant role in his current predicament. The party-gate scandal, followed by the disastrous mini-budget, fractured the Conservative coalition, possibly beyond repair. Rishi Sunak may not have played his hand well, but the hand he was dealt was a bad one.

The result of it all? A collapse in support across all Clans, but with some of the shifts much more pronounced. The chart below maps this out, showing the percentage point change in support across key groups. You can see that while down across almost all Clans, some of the changes are more pronounced than others, particularly Proud & Patriotic State, Sovereign Tradition and Modern Working Life, which are changes we all look at in more detail later in this report.

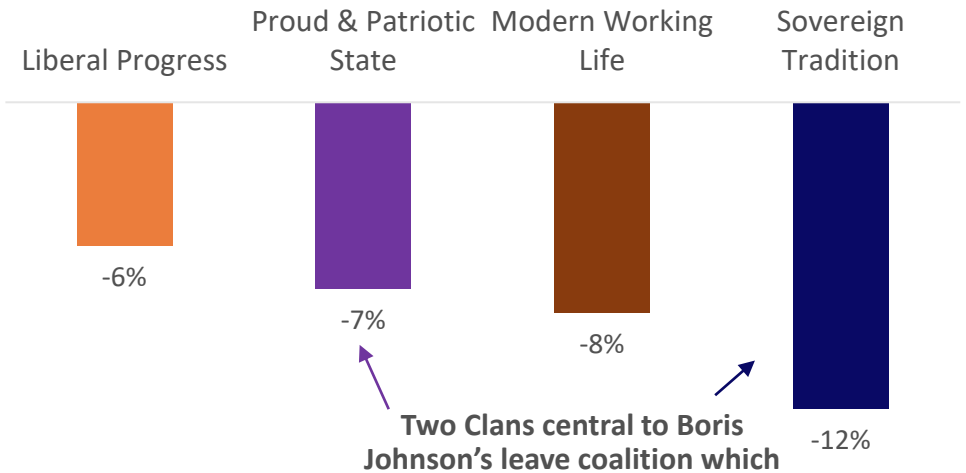
Much of the change can be attributed to voters' assessments of competence, often referred to as "valence" by political scientists. The Conservatives are generally seen as having a poor record in government and have lost trust in many key areas, with voters feeling they haven't delivered. However, our thesis is that voters don't make these valence assessments in a vacuum; their evaluations are influenced by their values. How they assess parties and their potential to switch allegiances are informe by these broader value and identity systems. We believe the shifts outlined later in this report demonstrate this dynamic.

Percentage Point Change in share of vote between 2019–May 2024



But the picture across the Clans has generally got worse under Sunak

Percentage point change in share of vote between 2022 (Johnson/Truss) and May 2024 (Sunak)



Since Rishi Sunak has taken office – rather than recovering – the picture for the Conservative Party has gotten worse, not better. The problem in clan terms is illustrated in the chart below.

The 2019 leave coalition has further eroded, with the most significant shift being the decline in support for the Sovereign Tradition Clan by 12 percentage points. This core Tory Clan, known for its blend of low tax and right-wing economic positions with socially conservative views on immigration and family life, has been significantly impacted by the Reform UK surge. As detailed on page 17, this surge has effectively siphoned off their core voters, contributing to the decline in Conservative support.

Secondly, there has also been a decline in the Proud & Patriotic State Clan – a group with equally socially conservative views of Sovereign Tradition, but mixed with left-wing, pro-nationalisation priorities on the economy. As we explore later, both Labour and Reform have made inroads with this group. All in all, Rishi Sunak has seen support fall on both sides of their leave foundation, the platform so crucial to their 2019 victory.

It's not just the core parts of the Leave coalition that have seen a decline in support for Rishi Sunak – though this is where it is most striking. His popularity has also suffered in other groups, indicating a broad-based erosion of support. The Conservatives have witnessed an 8-percentage point decline in support in the key Modern Working Life swing group and a 7-percentage point drop among the more socially Liberal Progress. This widespread decline underscores the challenges facing the party under Rishi Sunak's leadership.

Every key component of the potent 2019 coalition has come undone

The chart here illustrates the extent to which the Tory coalition built in 2019 has collapsed. Note that the chart uses the broader summary groups for ease of interpretation.

The leave coalition is now fractured and diminished, a trend which has only continued under Rishi Sunak's leadership.

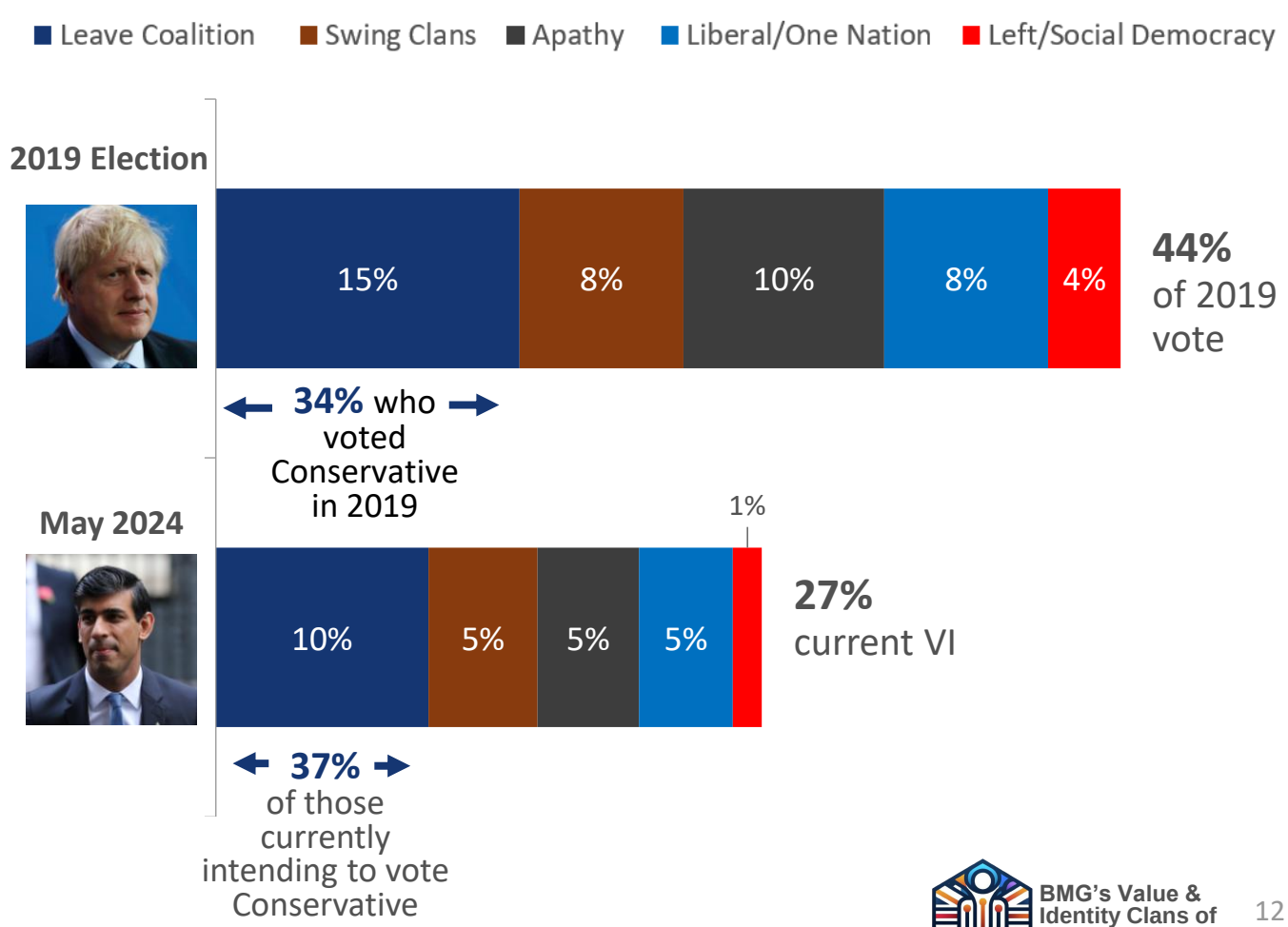
The swing voters, a crucial group of Clans that often decides elections, have halved in terms of those currently intending to vote Conservative.

Additionally, support from the Liberal/One Nation Clans and the more progressive and Left/Social Democracy Clans has dwindled.

Perversely, all this means that Rishi Sunak is actually slightly more reliant on the Leave coalition Clans as a share of those currently intending to Conservative than Boris Johnson was, despite shedding countless votes from these Clans to both Labour and Reform.

*The chart, right, shows the **share of the total vote**, not just the share of the Conservative vote. For example, in 2019, 15% of total voters voting Conservative were from the Leave Coalition. If calculated in terms of the Conservative vote, this would mean that 34% of those in Leave Coalition Clans voted Conservative (15% / 44%).*

Change in Conservative coalition between 2019 and 2024 (summary groups)



Labour’s comeback with the Proud & Patriotic State Clan

A key part of the Conservative winning coalition in 2019 was the Proud & Patriotic State Clan. This group tends to favour redistribution of wealth and nationalisation of key industries while strongly opposing multiculturalism and freedom of movement. In 2016, 81% voted to leave the EU.

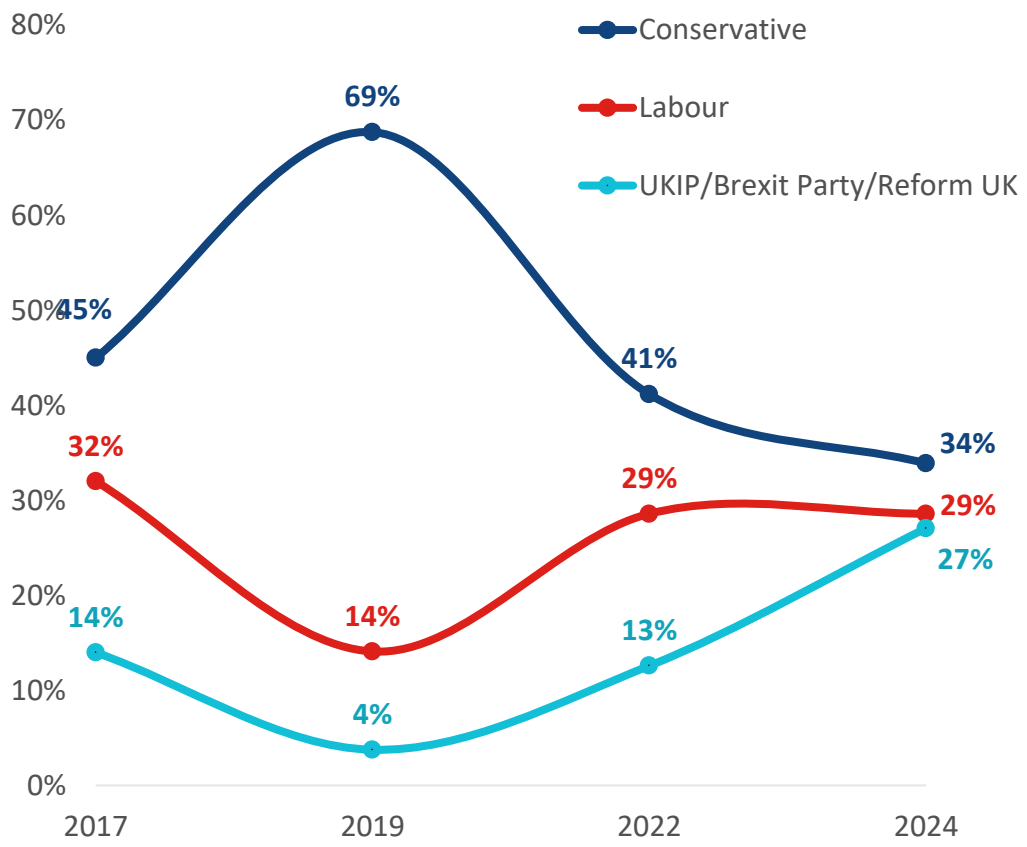
In 2019, Boris Johnson’s Conservatives secured the vote of 60% of this Clan’s votes, with just 14% supporting Labour. By the time Boris Johnson handed over to Liz Truss, Conservative support had dropped to 41%, with Labour’s share increasing to 29%. Under Rishi Sunak, the Conservative lead has fallen further, with Labour still taking 29% and the Conservatives just 34%.

For any decline, the Conservatives’ more general perceived failures since 2019 will be a major contributor – including their perceived failures on immigration, which is a top priority issue for this group. However, while Boris Johnson had strong appeal with these voters, Rishi Sunak’s more metropolitan, internationalist “vibes” does not play well with members of this Clan.

Labour’s strategy under Keir Starmer will also have helped win some votes back to Labour. Since taking the Labour leadership, Keir Starmer has constantly avoided the ‘B’ word (Brexit), instead focusing on other issues. Moreover, their commitment to a new Border Security Command and being constantly seen in front of the Union Jack for speeches and TV appearances is a clear play to the sorts of voters.

However, the other part of the story with Proud & Patriotic State—explored later on page 17—is the votes the Conservatives have lost to Reform, a trend that has only got worse under Rishi Sunak.

Change in support in the Proud & Patriotic State Clan (2017-2024)



Starmer’s Labour has turned the swing Clans from deep blue in 2019 to red in 2024

Keir Starmer’s team is said to have placed a laser focus on so-called swing voters in their messaging and positioning. In terms of our clans, we have identified three what we term ‘swing clans’:

- The Modern Working Life Clan tends to adopt left-of-centre economic values and broadly liberal social views, combined with a strong belief in hard work, social mobility, and a tougher approach to welfare.
- The Measured Middle Clan holds middling views on many dimensions but is particularly sceptical of open borders and multiculturalism.
- The Strength & Respect Clan has mixed and moderate views but favours authority and discipline in areas like defence, human rights, and the justice system.

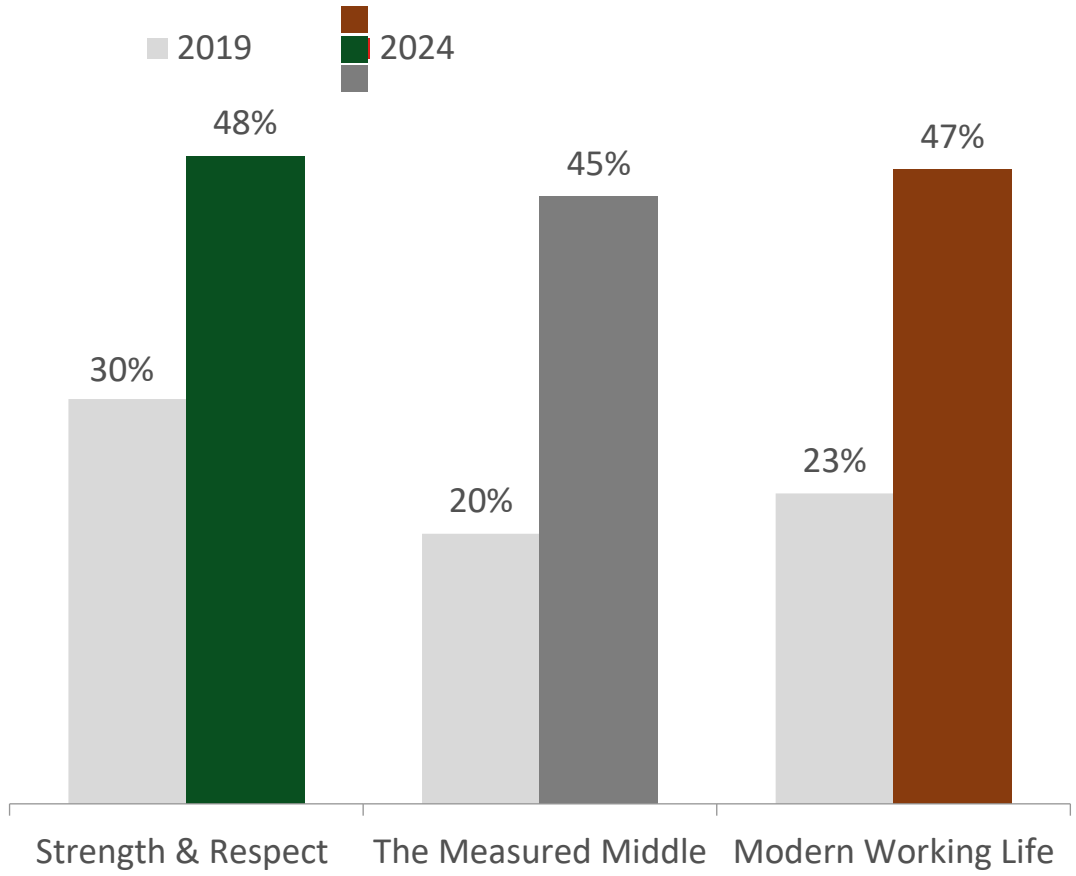
In 2019, these groups moved strongly blue. However, under Keir Starmer, they have shifted steadily towards Labour. The average increase in the Labour vote has been 22% points, with the Tories dropping by 20% points – representing an average swing of 21%.

Again, perceived Conservative failings and mismanagement will have a big role in this change – but throughout Keir Starmer’s time as Labour leader, he has made clear moves to win over these voters. Keir Starmer’s focus on economic responsibility, coupled with policies on welfare, defence, and immigration, contrasts considerably with Jeremy Corbyn’s tone and policies.

For example, keeping the welfare cap, the defence "triple-lock", emphasis on national security and setting up a new Border Security Command to tackle small boat crossings are all policies that will have a particular appeal in swing Clans.

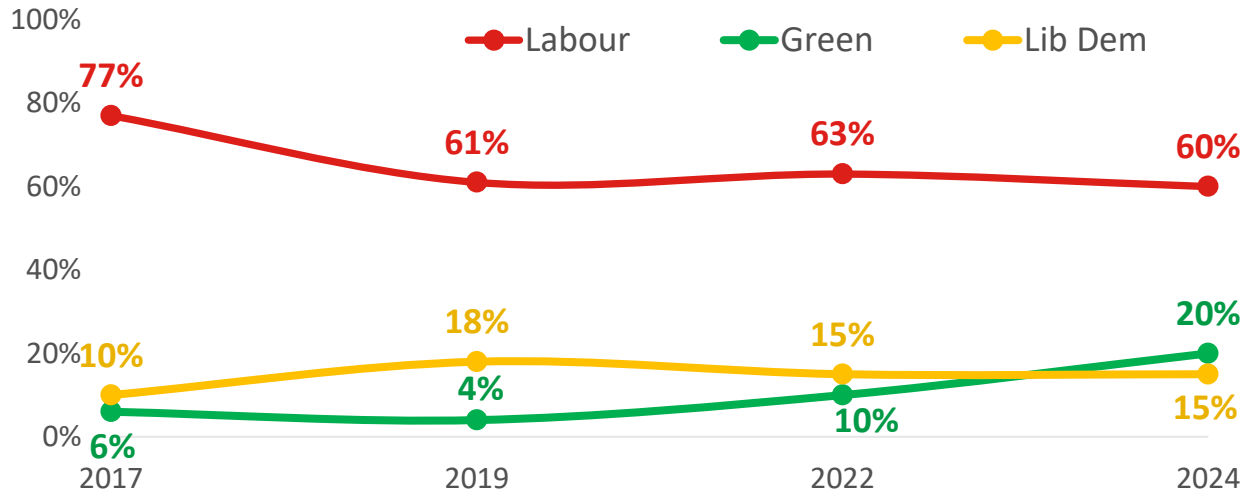
Critics often claim Keir Starmer lacks clear stances and is too driven by focus groups. Yet, our analysis at least highlights the success of their strategy: the swing Clans have turned red.

Change in Labour support among ‘swing Clans’ (2019-2024)



Labour's left flank is sticking with Starmer – at least for now

Change in support in the Green Global Community Clan (2017-2024)



There is one notable Clan where Labour has not made any progress since 2019: Green Global Community.

This group combines left-wing redistributive views on the economy with internationalist and environmentalist stances, i.e. the Clan whose values best reflect those of Jeremy Corbyn. In 2019, 61% of this Clan voted Labour, a fall on 2017 (77%)

However, the lack of movement in this group since 2019 can hardly be seen as a failure for Labour. While Labour has not upped its vote with this group to anything like 2017 levels, it has maintained around 3 in 5 votes of clan members here (60% in our latest poll), all the while making significant inroads into other Clans. They may not be enthusiastic fans of Keir Starmer like they were with Jeremy Corbyn – but their support for Labour has been maintained. Indeed, an enthusiastic vote and perhaps a slightly more reserved one still count the same.

The Greens have also substantially grown their support here – but from a low base. Only 4% of this group voted Green in 2019, up to 20% today and ahead of the Lib Dems. However, while notable, the growth is a far cry from the waves that Reform has made with Proud & Patriotic State and Sovereign Tradition Clans (see page 17).

The Liberal Democrats are making small but significant inroads with the One Nation Modernisers

At a topline level, the Liberal Democrats' vote share appears to have barely shifted. At 9% in our latest poll, it is in line with the share they recorded in 2019.

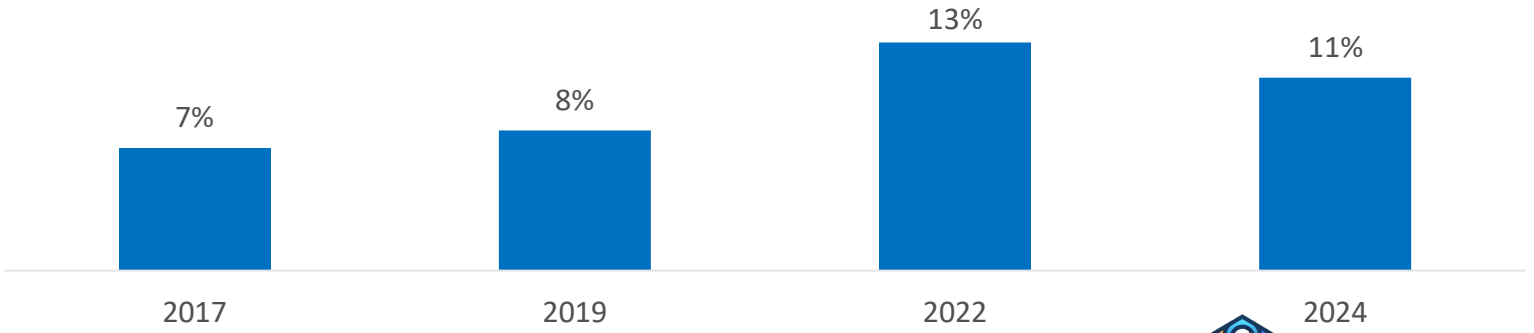
However, the Liberal Democrats have made more notable progress with one Clan in particular, a shift that should worry the Conservatives: the One Nation Modernisers. From 8% in 2019, a non-negligible 11% of this Clan say they intend to vote Lib Dem now (a figure that is actually slightly lower than we have had in polls previously).

What values do the One Nation Modernisers hold? One of the most pro-business Clans, they mix a modern form of conservatism on the environment and society with traditional views on family life and British institutions. The sort of voters that tended to like David Cameron's brand of conservatism.

While this might not appear like a huge shift, this is the single greatest percentage point increase of any Clan that the Liberal Democrats have achieved. At the same time, their vote in their more socially democratic Common Sense Solidarity Clan is unchanged (14% cf. 14 in 2019), while their vote in the more naturally aligned Liberal Progress Clan also looks to be down ever so slightly (14% cf. 18% in 2019).

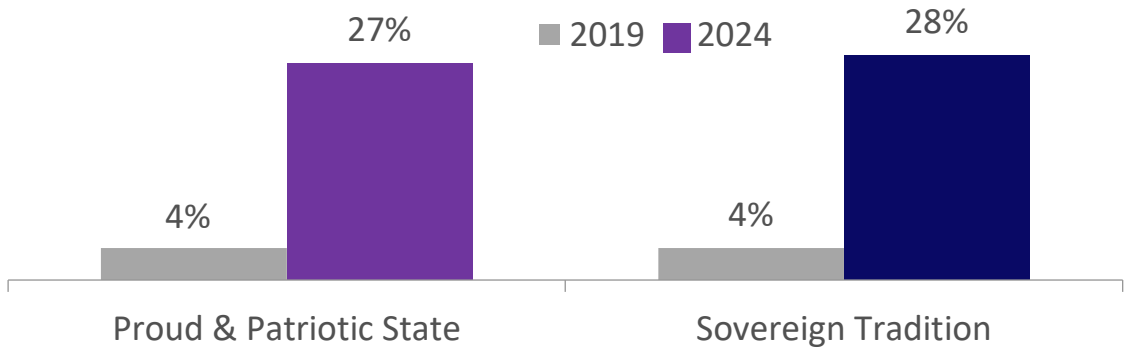
The shift in the group adds to the existing evidence suggesting the Liberal Democrat vote share is becoming more targeted and damaging to the Conservative's election prospects, picking up votes in seats often characterised by their disproportionately "one nation" liberal Tory voter base. These sorts of voters are located disproportionately in the so-called "blue wall", so seats like Chesham and Amersham, Wokingham, and Somerton and Frome.

Lib Dem vote share with One Nation Moderniser Clan (2017-2024)



Reform UK could deal a knock-out blow to the Conservatives

Reform/Brexit Party vote 2019 vs 2024 across key leave coalition Clans



Despite their drastically different views on the economy, wealth, and redistribution, Reform UK has successfully pulled support from two Clans by focusing on their immigration and border policies.

The Proud & Patriotic State Clan, where Labour has made inroads, has also proved fertile ground for Reform UK. This Clan favours redistribution of wealth and nationalisation of key industries while strongly opposing multiculturalism and freedom of movement. A notable 27% of this group intends to vote for Reform, up from just 4% who voted for the Brexit Party in 2019.

Meanwhile, the Sovereign Tradition Clan - which also has conservative views on social issue including immigration but combines this with support for a small state and low taxation - is their other key source of support. 28% now say they will vote for Reform, compared to just 4% who voted for the Brexit Party in 2019.

So, while Labour has made some inroads and has the Conservatives on the ropes with both sets of voters, since Rishi Sunak became leader, Reform has shown the potential to deliver a truly knockout blow.

The problem for Rishi Sunak? His net satisfaction with the Proud and Patriotic State Clan is particularly low (20% satisfied, 58% dissatisfied). Meanwhile, ominously for the Conservative paty's prospects, Nigel Farage has strong appeal with members of both Clans.

Labour should heed the cautionary tale of the 2019 Conservative coalition

At the outset of this report, we discussed how Boris Johnson built a commanding coalition in 2019. Labour, under Keir Starmer, is on the verge of doing the same. However, the lesson for Labour is clear: their coalition could be equally fragile if they enter government in a few weeks.

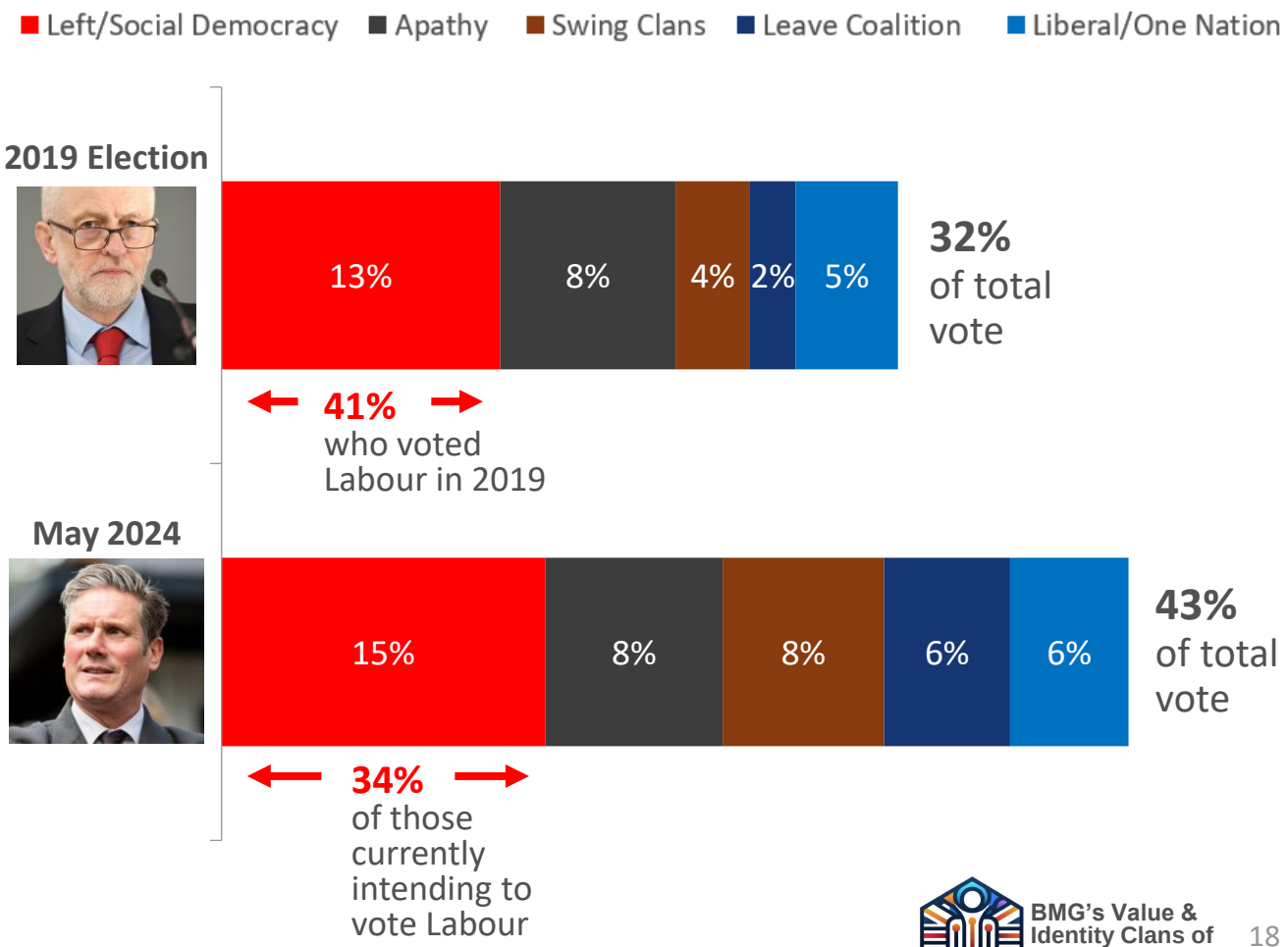
As the chart on the right shows, in terms of the number of votes, Labour's reliance on the Left/Social Democratic Clan is very similar between 2019 and 2024. But because Labour has reached out so effectively to other Clans, the share of the current Labour vote from this group has come down significantly. Labour has broadened its appeal across the spectrum, particularly in the swing Clans and within the Leave coalition, notably with the Proud and Patriotic State Clan.

The key point to understand is that much of the support Labour have won as come from Clans with values that are, to varying degrees, socially conservative. On issues like immigration, welfare, defence, and patriotism, these voters align more closely with traditionally Conservative thinking.

Labour will need to work hard to keep them onside if they want to avoid the fate of the Conservatives post-2019. Indeed, as we discuss on page 20, GB Energy looks like exactly the sort of policy designed to keep this coalition of Clans together.

*The chart, right, shows the **share of the total vote**, not just the share of the Conservative vote. For example, in 2019, 13% of total voters voting Conservative were from Left/Social Democracy. If calculated in terms of the share of the Labour vote, this would mean that 41% of those in Leave Coalition Clans voted Conservative (13% / 32%).*

Change in Labour coalition between 2019 and 2024 (summary groups)



A tale of two policies: The National Service policy is a strategically positioned policy suited only to a defensive campaign

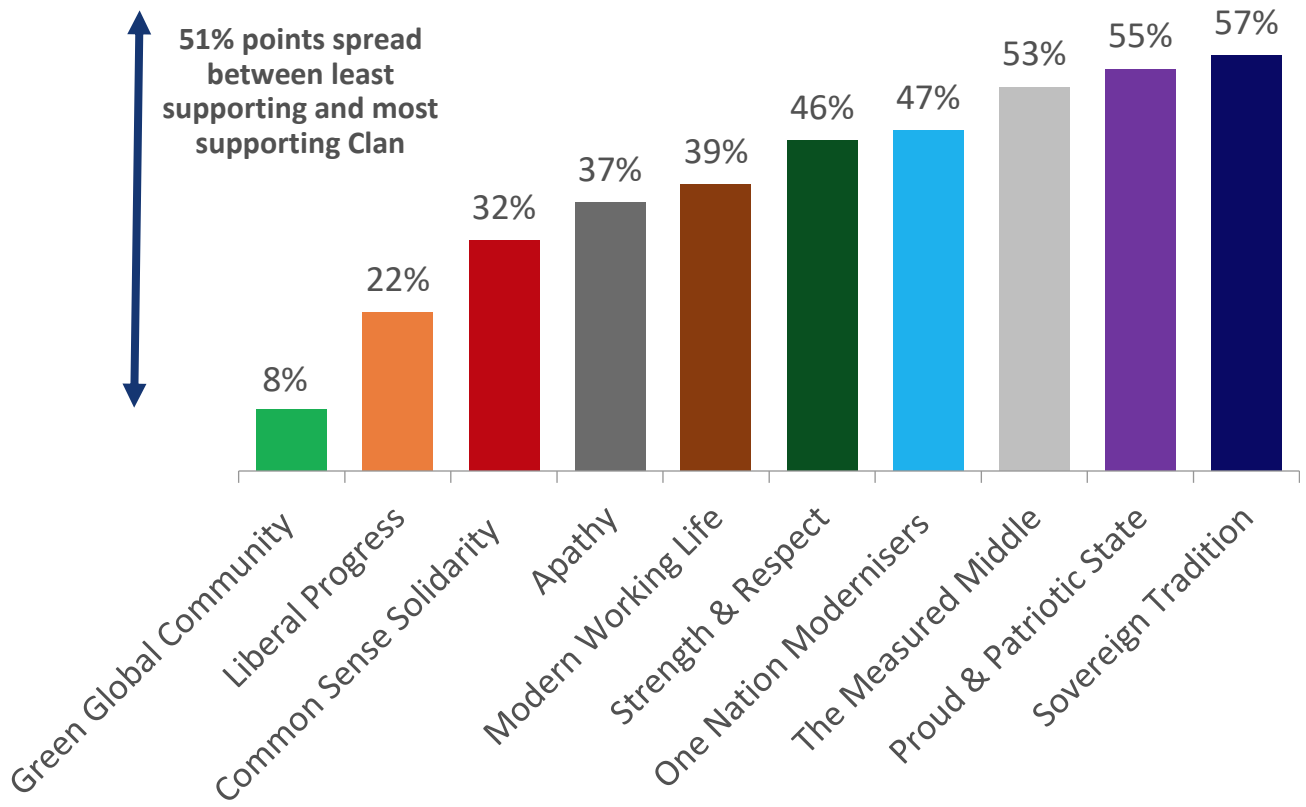
The National Service policy, which garnered many headlines in the first week of the campaign, is not that popular nationally. 40% support it, with almost as many against (36%).However, the policy has a more targeted and strategically useful appeal than the headline numbers suggest. Given Rishi Sunak's predicament among the Proud & Patriotic State and Sovereign Tradition groups, there is a good argument to suggest the policy makes real strategic sense.

As the chart, right, illustrates, the policy resonates well with these two groups, with well over half of these voters supporting it, as well as with two of the key swing Clans, the Measured Middle and Proud Strength & Respect.

Those who oppose it are unlikely to vote Conservative anyway, so it also arguably creates useful dividing lines. Indeed, the disparity in support is notable, ranging from just 8% in the Green Global Community, to well over half in the key Clans the Tories are targeting – by far and the way the policy we have tested with the Clans sees such uneven support. It is the sort of policy designed to ignite a debate and grab attention.

The policy might work for a defensive campaign aiming to rally the core vote. But it does not feel like a "one nation" strategy designed to win; rather, it is an attempt to limit damage and try and persuade some of the core vote to come back.

Support for Conservative's National Service policy (% support)



A tale of two policies: By contrast, GB energy is the sort of policy that will help bring together a broader coalition of voters

If Labour are to hold on to their coalition, their Great British Energy policy is case in point in how they might do so.

As the chart right shows, it receives broad support across the country (60%) and is not very divisive. Even the Clan with the least support, Sovereign Tradition, has 42% backing it.

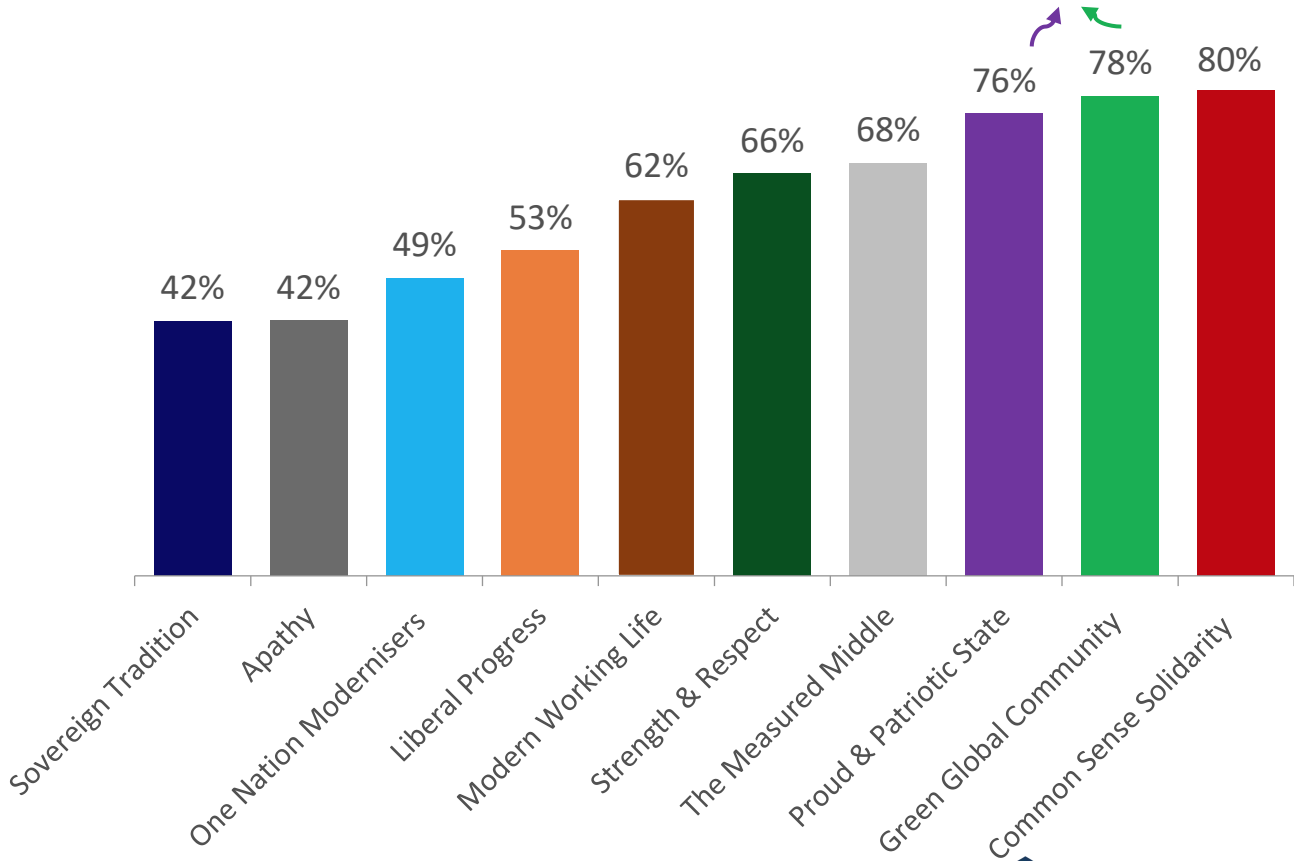
Crucially, it unites key elements of Labour's coalition. The Green Global Community backs it with 78% support, likely due to its renewable, green focus and proactive use of the state. Meanwhile, the Proud & Patriotic State Clan also supports it strongly, with 76% backing, attracted by its patriotic and nationalistic message, securing British interests.

Remember, these are Clans that are very opposed on other issues. As we saw, National Service has just 8% support from the Green Global Community compared to 55% from the Proud and Patriotic State.

It's therefore no surprise this proposal features so prominently in Labour's 6 steps. It also goes to shows that, with the right policies, messaging and delivery, it is possible to keep the fragile coalition together. But as Labour looks on the brink of power, it will only get harder and harder to do so.

Support for Labour's GB Energy policy (% support)

Two Clans with clashing views on National Service, **untied in support** for GB Energy



Appendix

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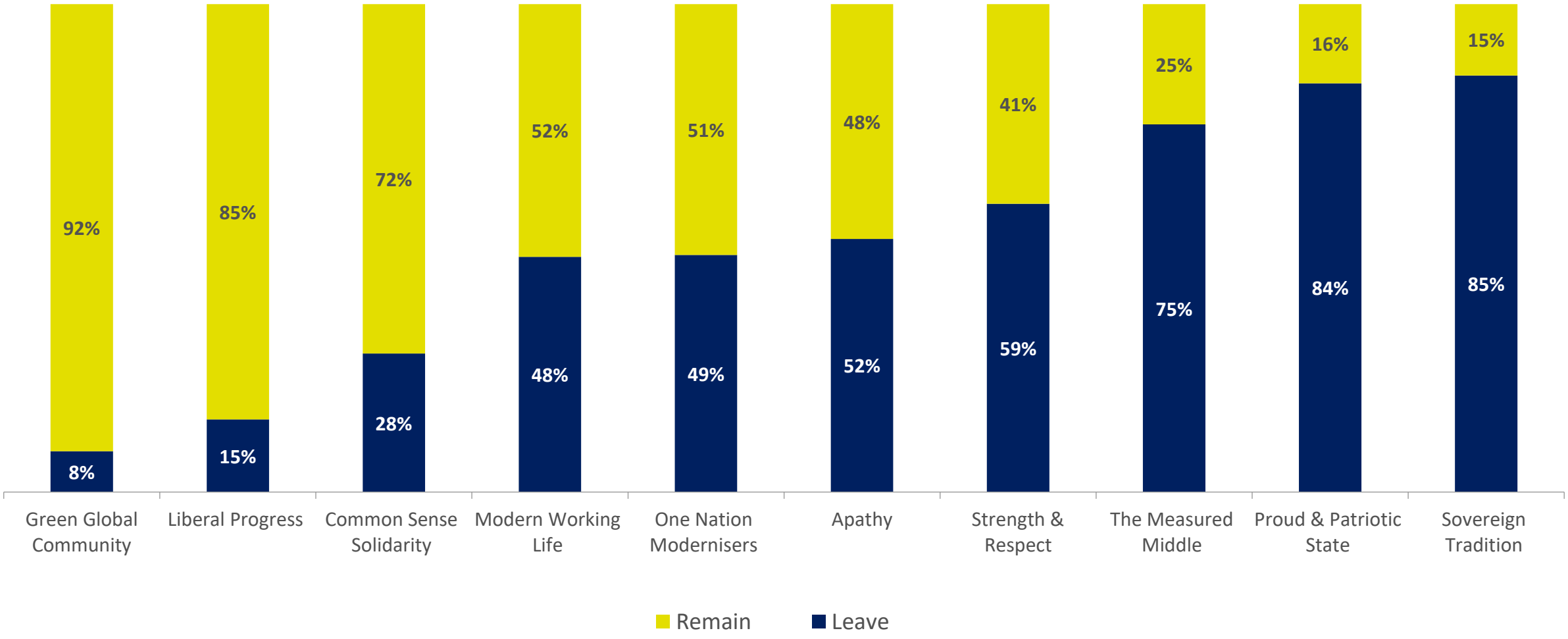
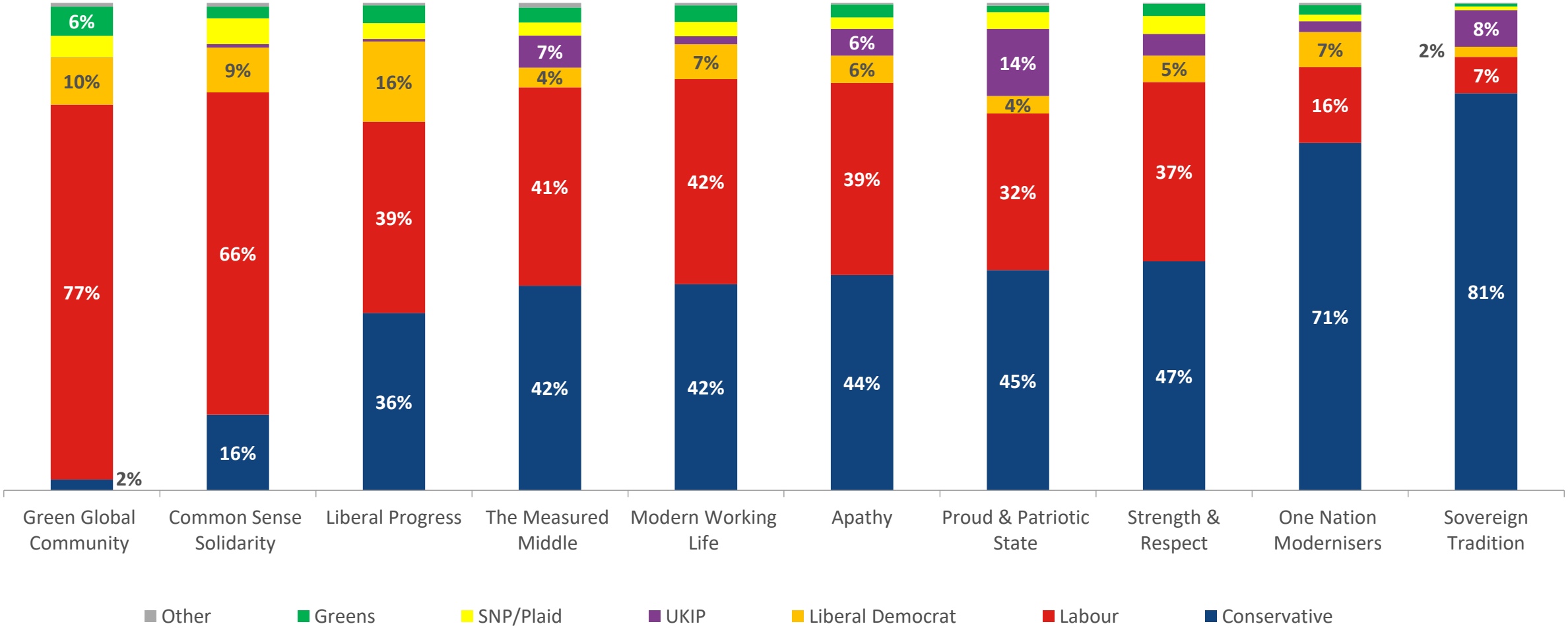
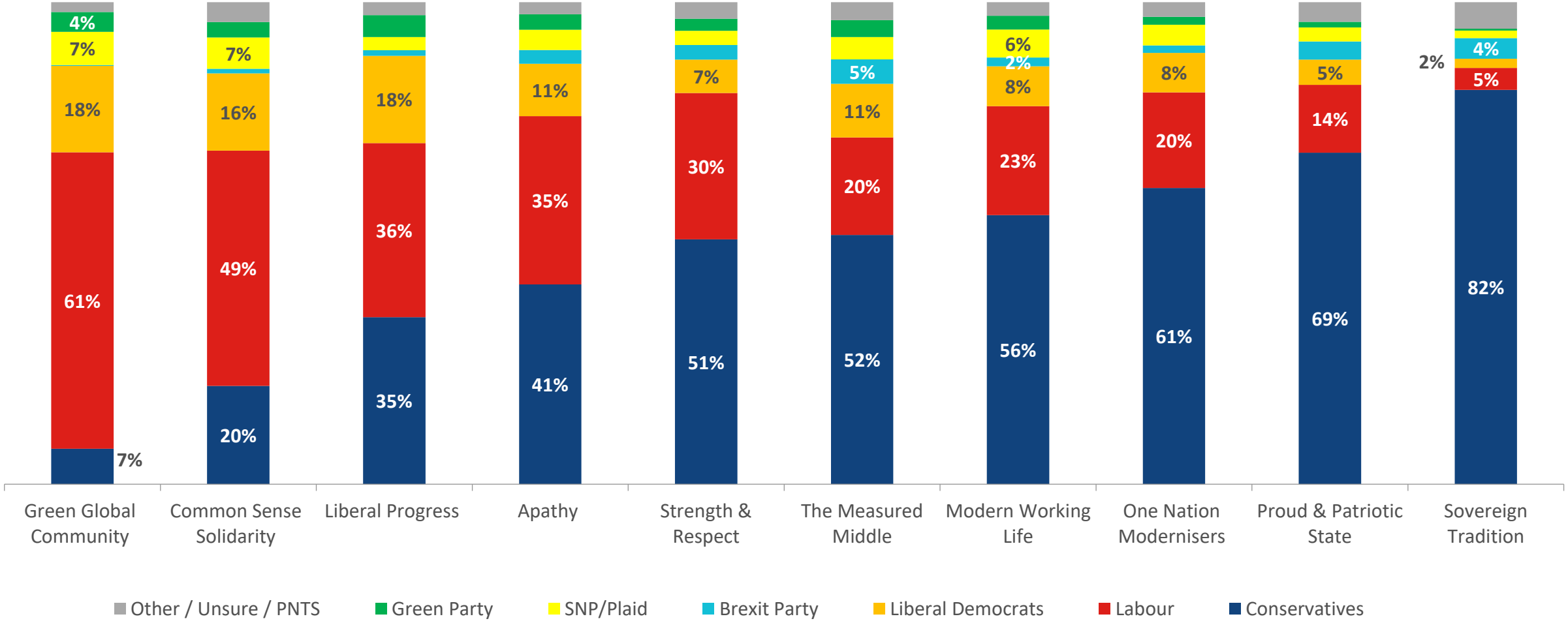
How the Clans voted in the **2016 EU Referendum**



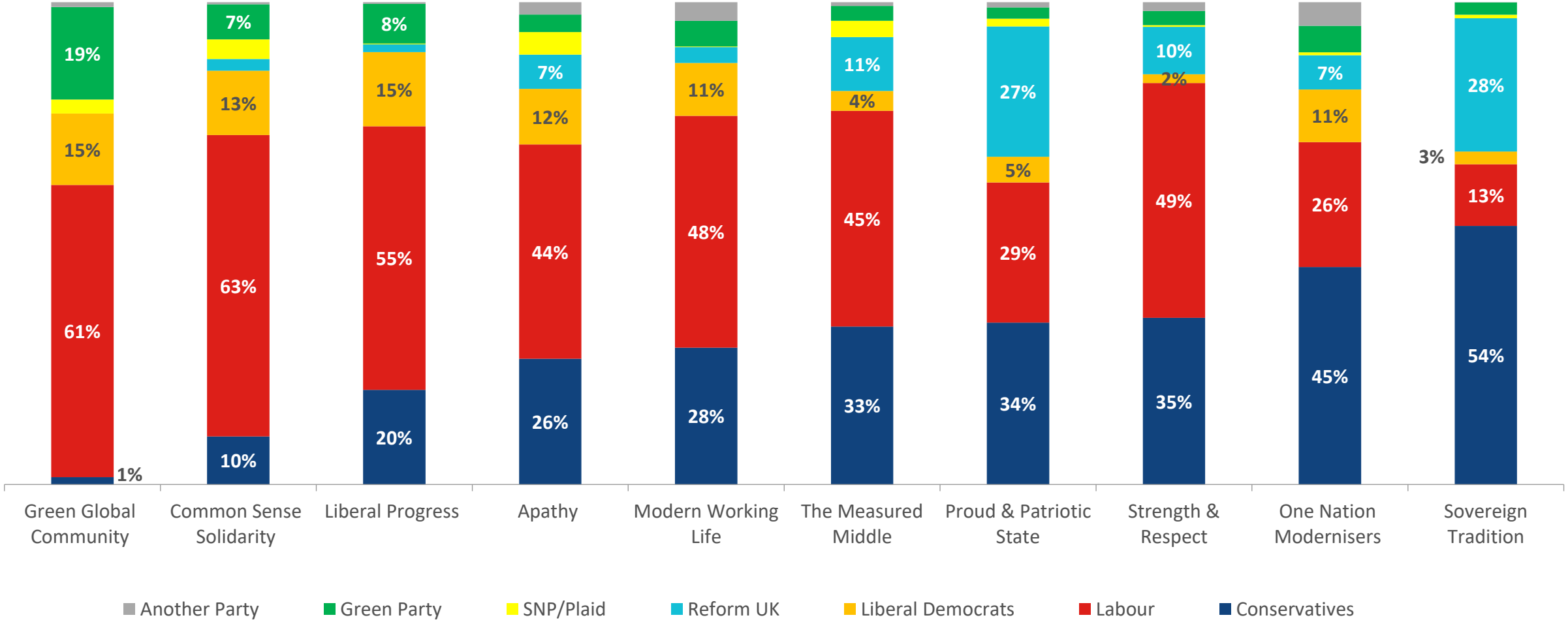
How the Clans voted in the **2017** Election



How the Clans voted in the **2019** Election



How the Clan intend to vote in **July 2024***



* Voting intention results based on results from fieldwork on 28th to 29th May

About the authors

Want to know more about our Clans?
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Head of Public Perceptions

Robert leads BMG's Public Perceptions and research team. He has spearheaded major research programmes for think tanks, political parties, and government departments. Leading BMG's polling output, he has also conducted fast turnaround polling for media organisations including The i, The Independent, and Channel 4. In 2018, Rob was part of the original team that developed the Values and Identity Clans segmentation and has since advanced BMG's understanding of each voter group.

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Clive McDonnell is a Data Scientist at BMG Research. Clive received his BSc (Hons.) in Mathematical Sciences at the University of West England. He previously worked as a Predictive Modeller, providing analytical support for several blue-chip organisations. Clive now specialises in analysing large sets of data to provide detailed insight for BMG's clients. Clive has expertise in statistical testing, modelling, data processing, factor analysis and segmentation.

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