STONEHAVEN

AUTUMN 2024

Labour Insights Project

REPORT ONE

Labour’s ‘Hero Voters’, who they are and why they matter to business.



What does ‘change’ with Labour mean for your business?

The 2024 General Election was a ‘change election’. The Conservative vote collapsed. Labour’s election strategy delivered huge returns on a relatively modest vote share (34%), with a landslide victory for Keir Starmer.

Now with a new Prime Minister in Number 10, a new Chancellor in the Treasury, and a new Cabinet, what does this ‘change’ mean for business?

In this Stonehaven research project, we ask what is Labour’s strategy; what are the drivers and dynamics influencing decision making; and how should businesses set up for success with the new government? Across three reports, we set out our findings.

We provide insights from our proprietary research and modelling. The project has been delivered by Stonehaven’s team of advisors and consultants spanning data and insight, economics, policy and campaigns. This includes a number of advisors who undertook placements in Labour HQ during the General Election campaign.

THE BUSINESS LANDSCAPE WITH LABOUR

Britain has been a turbulent business environment in recent years, following periods of pronounced and unprecedented political upheaval and uncertainty. This research project puts the Labour government in the spotlight to help businesses to navigate the new environment with Labour.

The research doesn’t simply focus on the politics, but it seeks to help business leaders, investors and financiers to anticipate what the business environment will be with Labour in government - after 14 years of Conservative administrations, and, crucially, how to be an effective partner in shaping it.

We start, in this first report, with a deep dive into Labour’s strategy.



LABOUR'S 'HERO VOTERS' AND WHY THEY MATTER

Report One provides an overview of Labour's strategy for government and its 'two-term intent'. It explores the voters that comprise Labour's new electoral coalition, with a deep dive into Labour's 'Hero Voters' - who they are, their values and what they think. Labour's 'Hero Voters' – a term coined by party strategists in the run up to the 2024 General Election - are voters who returned to Labour or voted Labour for the first time in 2024 (excluding from this picture Labour's 'Core Vote', i.e. those who remained loyal to Labour under Jeremy Corbyn at the 2019 election).

These Hero Voters are the people that Labour needs to consolidate as supporters, if the party is to have a shot at realising Keir Starmer's 10-year mission to 'rebuild Britain'.

This is the most comprehensive study into Labour's 'Hero Voters' since the election. Here, Stonehaven's data and electoral modelling goes beyond existing analysis to create five new 'Hero Voter segments' to help clients better understand the voters comprising Labour's target audience. These five segments are: Optimistic Globalists, Pragmatic Starters, Measured Realists, Reform UK-Inclined Professionals and Grounded Youth. In this report we explore each group, where they are located and what they think about business, regulation, trade unions and workers' rights.

PARTNERING ON POLICY MAKING

In Report Two, which will be published after Labour conference, we will explore policy making under Labour. Labour's manifesto set out clear policy priorities and intent for government, with some immediate 'first steps'. But the policy detail and delivery of policy remains in development. With a new Policy Unit in Number 10, led by Stuart Ingham and Ravinder Athwal – the architects of Labour's manifesto, there is a clear desire for partners who are aligned with the strategic challenges facing government.

We explore the macroeconomic challenges for policy making and what 'viable political pathways' look like in the context of Labour's manifesto. We consider the role of the Number 10 Political Strategy Unit on the shaping of policy. And provide a case study of how Stonehaven's research is supporting the government's 2030 decarbonisation goal.

NEW GOVERNMENT, NEW DYNAMICS FOR ENGAGEMENT

In Report Three, we will explore some of the dynamics shaping the new Labour government, including:

- The role of trade unions in legislation, regulation and industrial disputes.
- The composition of the new Parliamentary Labour Party (PLP) comprising the 412 Labour MPs elected
- Directly-elected Mayors and their influence on national and regional policy and delivery
- Devolved administrations
- The Opposition and the role of other parties and groups in Parliament.
- The composition of the new team in Number 10, the Treasury and departments across Whitehall.



To discuss the findings in Report One or to receive future reports, please get in touch.

Adam McNicholas, Senior Advisor, Stonehaven

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Start by understanding the new Labour government's strategy

Labour Insights Project: Understanding Labour's 'Hero Voters', who they are and why they matter to business.

LABOUR INSIGHTS PROJECT

New government, new mandate and a new political outlook

We heard a lot over the last five years about ‘Red Wall’ voters. Expect to hear a lot more about Labour’s so-called ‘Hero Voters’. Here’s why.

Labour stood on a very clear ‘change’ platform at the election, securing a landslide. And with it, a strong mandate to govern. However, some analysts have described Labour’s winning voter coalition as a potential ‘political sandcastle’ that will be difficult to maintain at the next election, like the Johnson collapse after winning a sizeable majority in 2019. Retaining the support of ‘Hero Voters’ is therefore critical to a two term Labour government.

In 2027/28, Labour’s strategy depends on its new coalition of voters perceiving that Britain is turning the tide, with noticeable changes to their lives being realised. Labour’s election strategy, in the second half of this parliament, requires conditions to seek a new mandate to ‘let us finish the job’.

The realisation of this strategy requires new big ideas to bring to life the thematic commitments (the broad policy statements) that were embodied in the 2024 manifesto ‘Change’.

The new Political Strategy Unit in No10 will be testing these ideas on a specific group of voters within Labour’s new coalition. The ‘Hero Voters’ that were the target of political strategy before the election will be sought by Labour for consolidation of their support.

So, who are these ‘hero voters, why do they matter, and how can we best tap into their values?



Labour's Hero Voters: Who they are

Labour Insights Project | Labour's 'Hero Voters', who they are and why they matter to business.

So, who are Labour's 'Hero Voters'?

Labour's 'Core Vote' stuck with the party during its defeats from 2010 onwards. They comprise a segment of the electorate that is loyal to Labour, irrespective of what brand of party (centre or left wing) is on offer.

In 2024, Labour's electoral task was to persuade a target group of voters – what party strategists called Labour's 'Hero Voters' to return to Labour or to vote for the party for the first time.

Here, we explore these voters and the segments that make up this new voter coalition. Each segment, listed below, is profiled, followed by newly published findings about what they think about business, regulation, workers rights and trade unions and what this means for business leaders, investors and financiers.



Optimistic Globalist



Pragmatic Starters



Measured Realists



Reform UK-Inclined Professionals



Grounded Youth

"Pressure on household income is really adding to the stresses of everyday lives for Hero Voters. Their energy bills have risen by £520 between 2020 and 2023, their food costs are up £190 and for those renting, they've experienced above average rent increases of £380. For these voters, going to the pub is a once-a-month luxury. They are really feeling the pinch. They expect to see the change that they were promised to be delivered."

Ciara Dullaghan, Managing Consultant at Stonehaven.
Ciara worked in Labour HQ during the 2024 General Election campaign.

In the pages that follow, you will find what these Hero Voters currently think about business, workers, trade unions and regulation and, crucially, why this matters for business leaders, investors and financiers. They break down into five groups or segments.

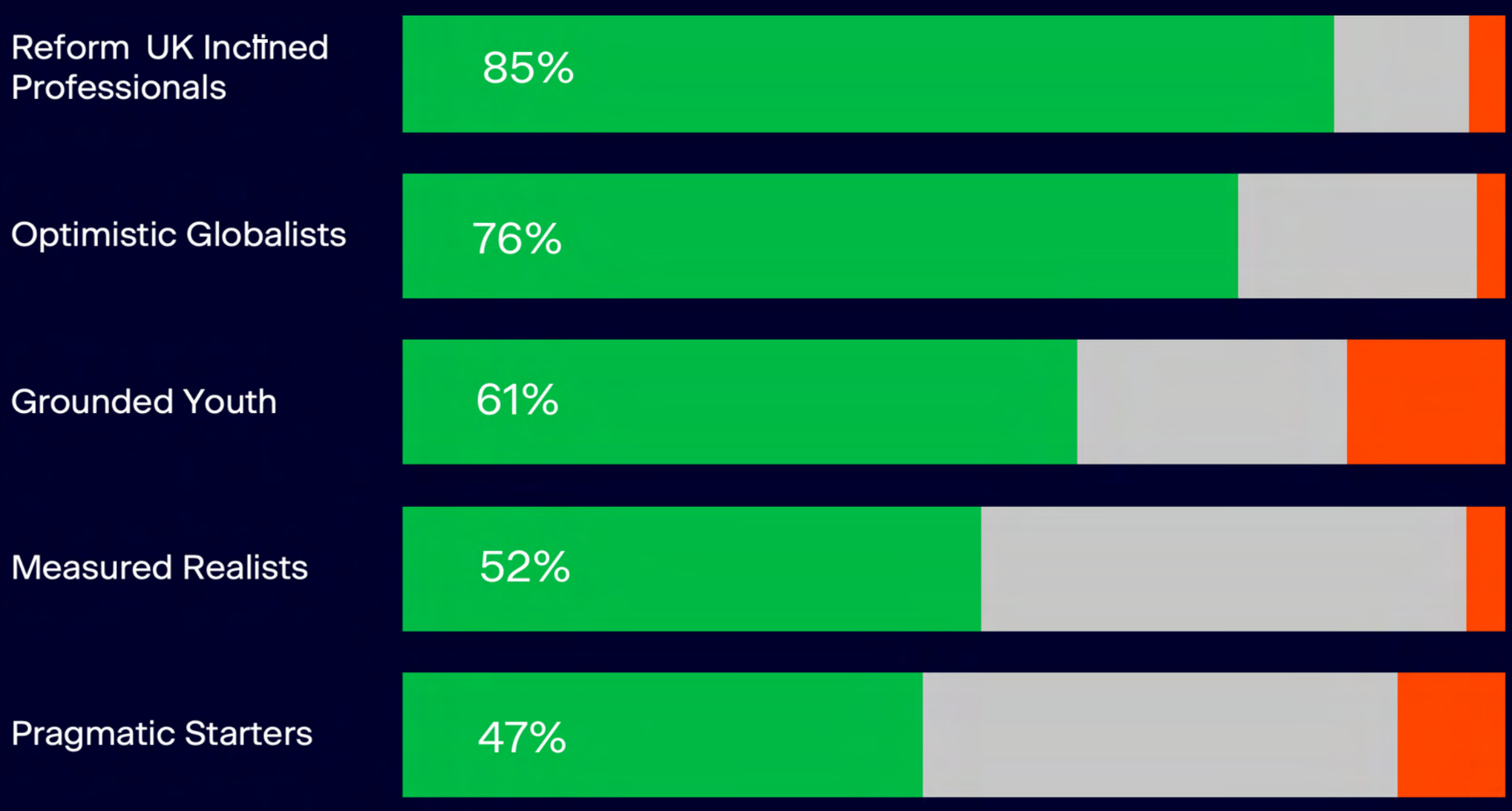
Labour's Hero Voters mostly have a positive outlook on how well the current government is performing.

Bar segments represent the percentage of Hero Voters who think the government is performing well, poorly, or are neutral in their view.

AVERAGE ACROSS LABOUR'S HERO VOTERS



LABOUR'S HERO VOTERS BREAKDOWN



"Labour's 'Hero Voters' are part of the broad coalition of voters secured at the 2024 General Election. So far, they remain broadly positive about the prospect of change under a new government, but want to see tangible evidence that the new administration is delivering. Labour strategists will be closely following these segments of voters in the months and years ahead."

Lucy Stewart, Consultant Researcher at Stonehaven who has conducted dozens of focus groups with these voter groups.



Optimistic Globalists

18% OF HERO VOTERS

DEMOGRAPHICS

This segment tends to be an older age cohort, with significant representation among individuals aged 45-54. They are geographically diverse but have higher concentrations in the East of England and North West England.

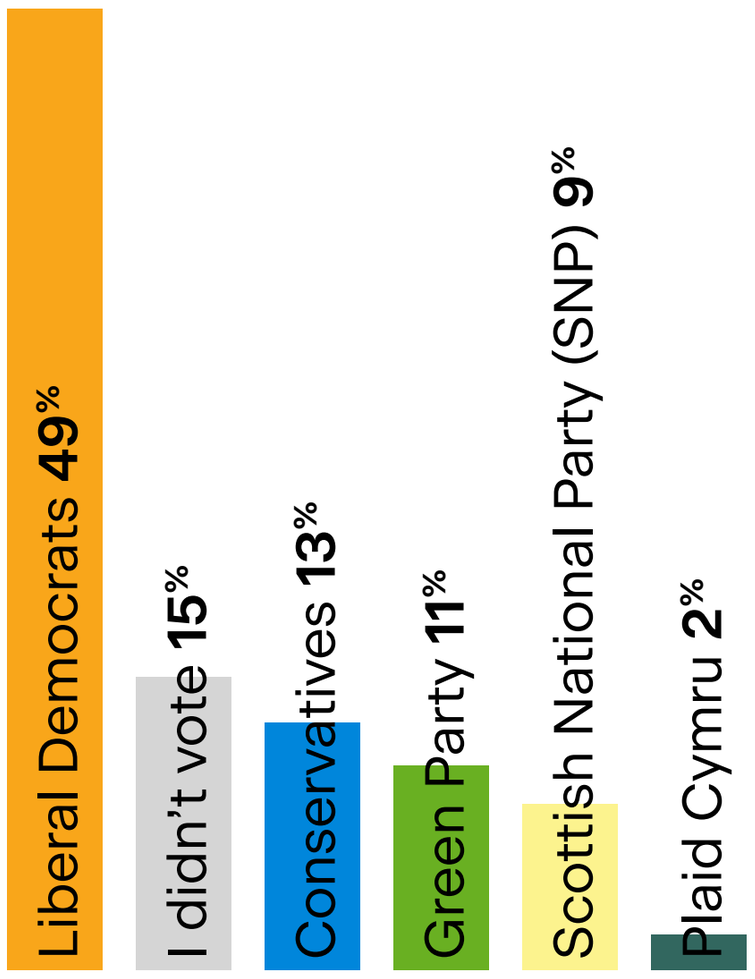
KEY CHARACTERISTICS

Optimistic Globalists are well-educated, with a large proportion having attained university-level education. They exhibit strong trust in politicians and are likely to believe in positive change through government intervention. Their worldview leans toward international cooperation a pro-EU outlook.

ENGAGEMENT

They are highly likely to engage with policy and political discussions, valuing detailed, evidence-based proposals that reflect global perspectives.

VOTING PREFERENCE IN 2019



RISE OVER THE LAST 3 YEARS

Energy Bills	£590
Food Costs	£180
Net Rent	£370

Five highest indexing constituencies

SEAT NAME	MP NAME	SEAT MAJORITY
Stirling and Strathallan	Chris Kane	1394
Glenrothes and Mid Fife	Richard Baker	2954
Aylesbury	Laura Kyrke-Smith	630
Suffolk Coastal	Jenny Riddell-Carpenter	1070
South Norfolk	Ben Goldsborough	2826

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.



Pragmatic Starters

14% OF HERO VOTERS

DEMOGRAPHICS

This group skews younger, with a majority in the 18-34 age range. They are more likely to be in Greater London and the West Midlands.

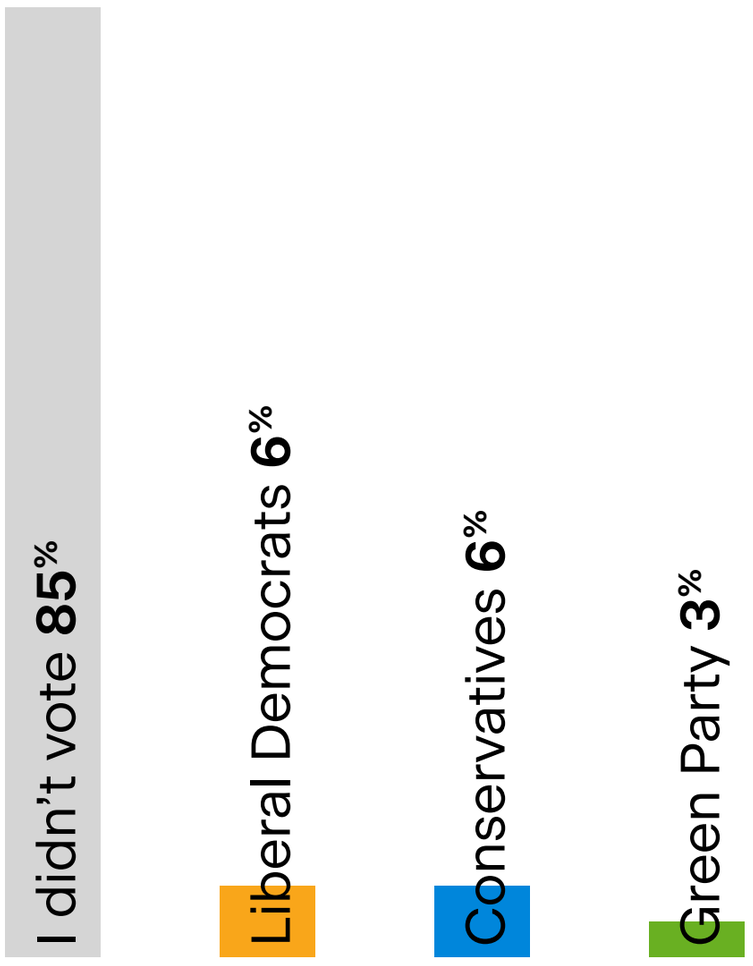
KEY CHARACTERISTICS

Pragmatic Starters are still in the early stages of their careers, which reflects in their education levels, with many having completed secondary or higher education. They are pragmatic about their political choices, often driven by practical concerns such as housing, job security, and economic opportunities.

ENGAGEMENT

While not deeply ideologically driven, they engage with policy discussions that offer clear, practical solutions to everyday challenges. They are more likely to favour policies that support economic mobility.

VOTING PREFERENCE IN 2019



RISE OVER THE LAST 3 YEARS

Energy Bills	£430
Food Costs	£210
Net Rent	£390

Five highest indexing constituencies

SEAT NAME	SEAT NAME	SEAT NAME	SEAT NAME	SEAT NAME
Birmingham Hodge Hill and Solihull North	Birmingham Yardley	Dudley	Burton and Uttoxeter	Tamworth
MP NAME	MP NAME	MP NAME	MP NAME	MP NAME
Liam Byrne	Jess Phillips	Sonia Kumar	Jacob Collier	Sarah Edwards
SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY
1566	693	1900	2266	1382

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.



Measured Realists

12% OF HERO VOTERS

DEMOGRAPHICS

This segment consists of individuals across a wide age range but with notable representation among those aged 35-54. They are more likely to be in South East England and urbanised areas of England.

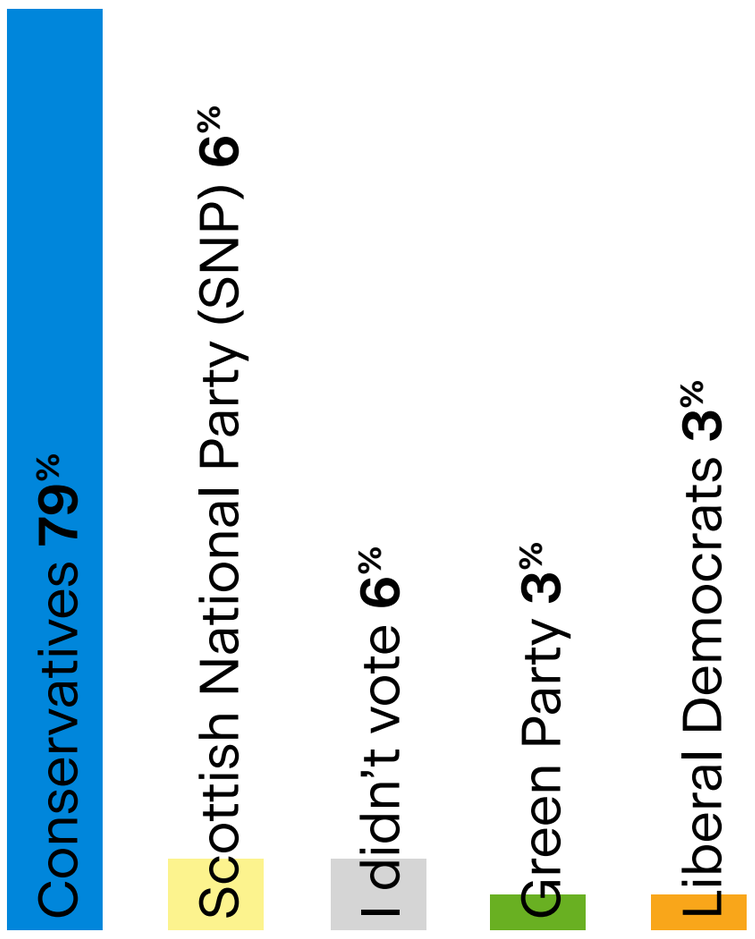
KEY CHARACTERISTICS

Measured Realists are typically moderate in their views. They tend to weigh the pros and cons of political proposals carefully before making decisions. Many have completed college-level education and tend to be in mid-career stages.

ENGAGEMENT

Their engagement with policy tends to focus on stability and long-term planning. They are cautious about radical changes, preferring policies that offer measured, realistic improvements.

VOTING PREFERENCE IN 2019



RISE OVER THE LAST 3 YEARS

Energy Bills	£430
Food Costs	£210
Net Rent	£390

Five highest indexing constituencies

SEAT NAME	MP NAME	SEAT MAJORITY
Redditch	Chris Bloore	789
North Warwickshire and Bedworth	Rachel Taylor	2198
Stoke-on-Trent South	Allison Gardner	627
Pendle and Clitheroe	Jonathan Hinder	902
Ashford	Sojan Joseph	1779

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.



Reform UK-Inclined Professionals

42% OF HERO VOTERS

DEMOGRAPHICS

This is the largest segment, with a broad age distribution but notable concentrations within the Millenial generation. They are highly educated, with the majority having completed university-level education. They have strong representation in Greater London, South East England and the North West.

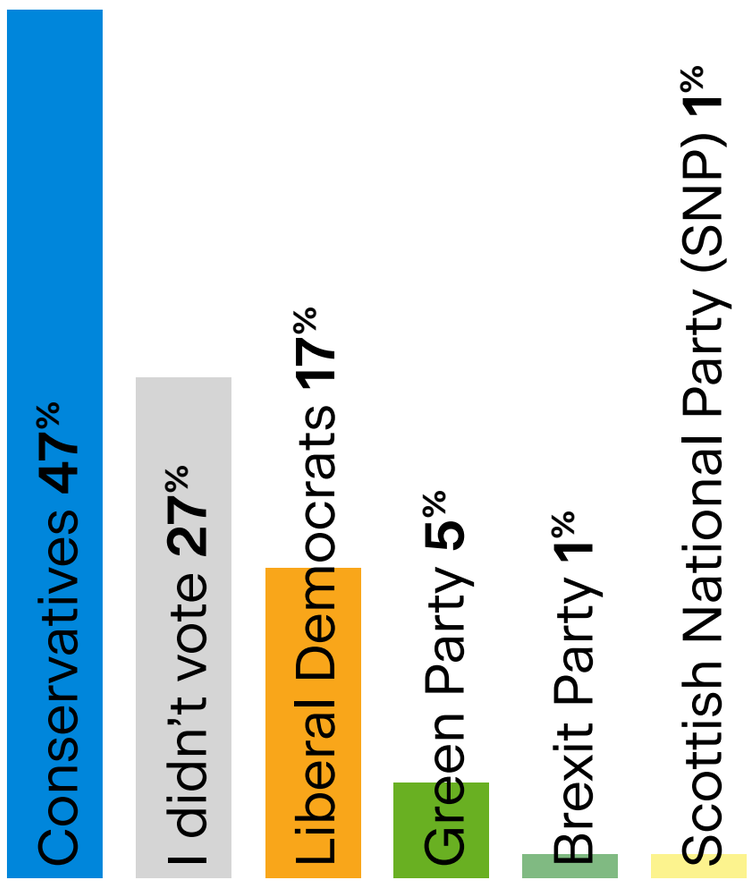
KEY CHARACTERISTICS

Reform-Inclined Professionals are deeply invested in societal issues, such as immigration and inequality. They are inclined to support major changes in policy to reconceptualise how the UK tackles its major challenges - such as climate, industrial renewal and economic productivity.

ENGAGEMENT

They are highly engaged with policy debates and actively support initiatives aimed at transformative societal change.

VOTING PREFERENCE IN 2019



RISE OVER THE LAST 3 YEARS

Energy Bills	£590
Food Costs	£180
Net Rent	£370

Five highest indexing constituencies

SEAT NAME	SEAT NAME	SEAT NAME	SEAT NAME	SEAT NAME
Cities of London and Westminster	Ilford North	Bexleyheath and Crayford	Hendon	Dartford
MP NAME	MP NAME	MP NAME	MP NAME	MP NAME
Rachel Blake	Wes Streeting	Daniel Francis	David Pinto-Duschinsky	Jim Dickson
SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY	SEAT MAJORITY
2708	528	2114	15	1192

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.



Grounded Youth

14% OF HERO VOTERS

DEMOGRAPHICS

This segment consists predominantly of young individuals, particularly those aged 18-24. They are more likely to be in early career stages or still in education. Geographically, they are more concentrated in Scotland and the East of England.

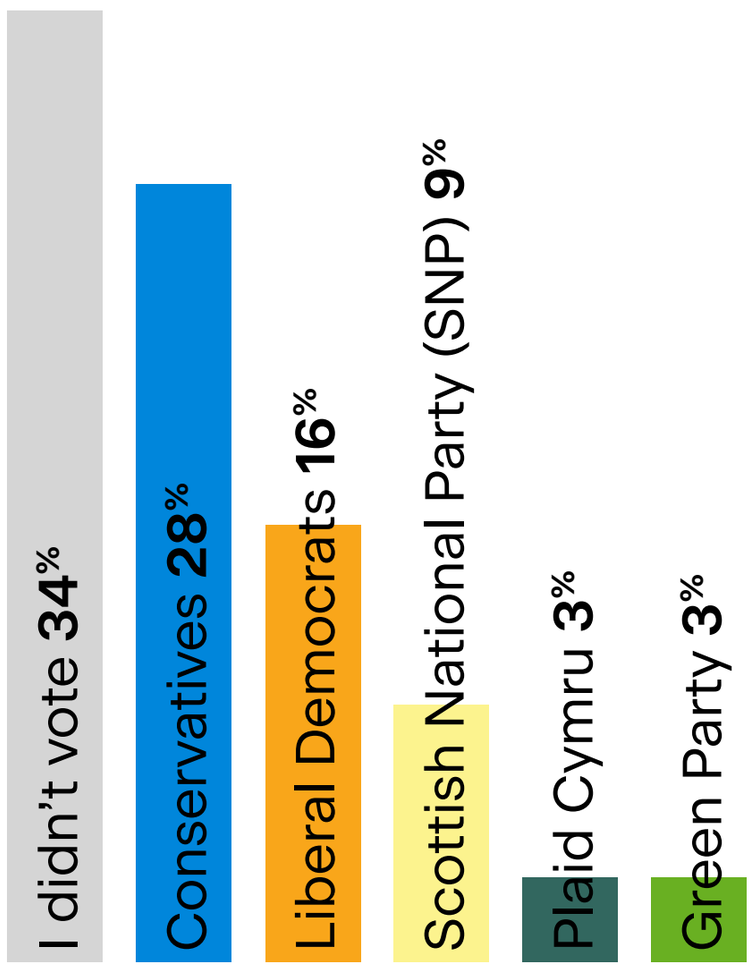
KEY CHARACTERISTICS

Grounded Youth are typically focused on their immediate future, including education, employment, and housing concerns. While they may be politically interested, they are often more concerned with policies that directly affect their economic opportunities and living conditions.

ENGAGEMENT

Engagement with this segment tends to be pragmatic and focused on issues that directly impact their immediate opportunities, such as education reform, job creation, and housing affordability.

VOTING PREFERENCE IN 2019



RISE OVER THE LAST 3 YEARS

Energy Bills	£430
Food Costs	£210
Net Rent	£390

Five highest indexing constituencies

SEAT NAME	MP NAME	SEAT MAJORITY
Stirling and Strathallan	Chris Kane	1394
Southend West and Leigh	David Burton-Sampson	1949
Lowestoft	Jess Asato	2016
Glenrothes and Mid Fife	Richard Baker	2954
Bury St Edmunds and Stowmarket	Peter Prinsley	1452

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.

Labour's Hero Voters: What they think

"Looking across the data, some results are unsurprising, such as the Grounded Youth's support for the right to switch off outside of work hours. But Stonehaven data shows high levels of support for the role of trade unions among Optimistic Globalists, an influential voter segment group that many may not expect to be so aligned with this aspect of Labour's agenda.

Business should use voter data to stay across which elements of Labour's offer are most resonant with Hero Voter segments – such as changing perceptions around the role of unions and workers rights - to ensure they stay aligned with Labour's strategy."

Alex Savage, Managing Consultant in Stonehaven's data and insight team. Alex was seconded into Labour's Strategy and Insight team for the 2024 General Election.

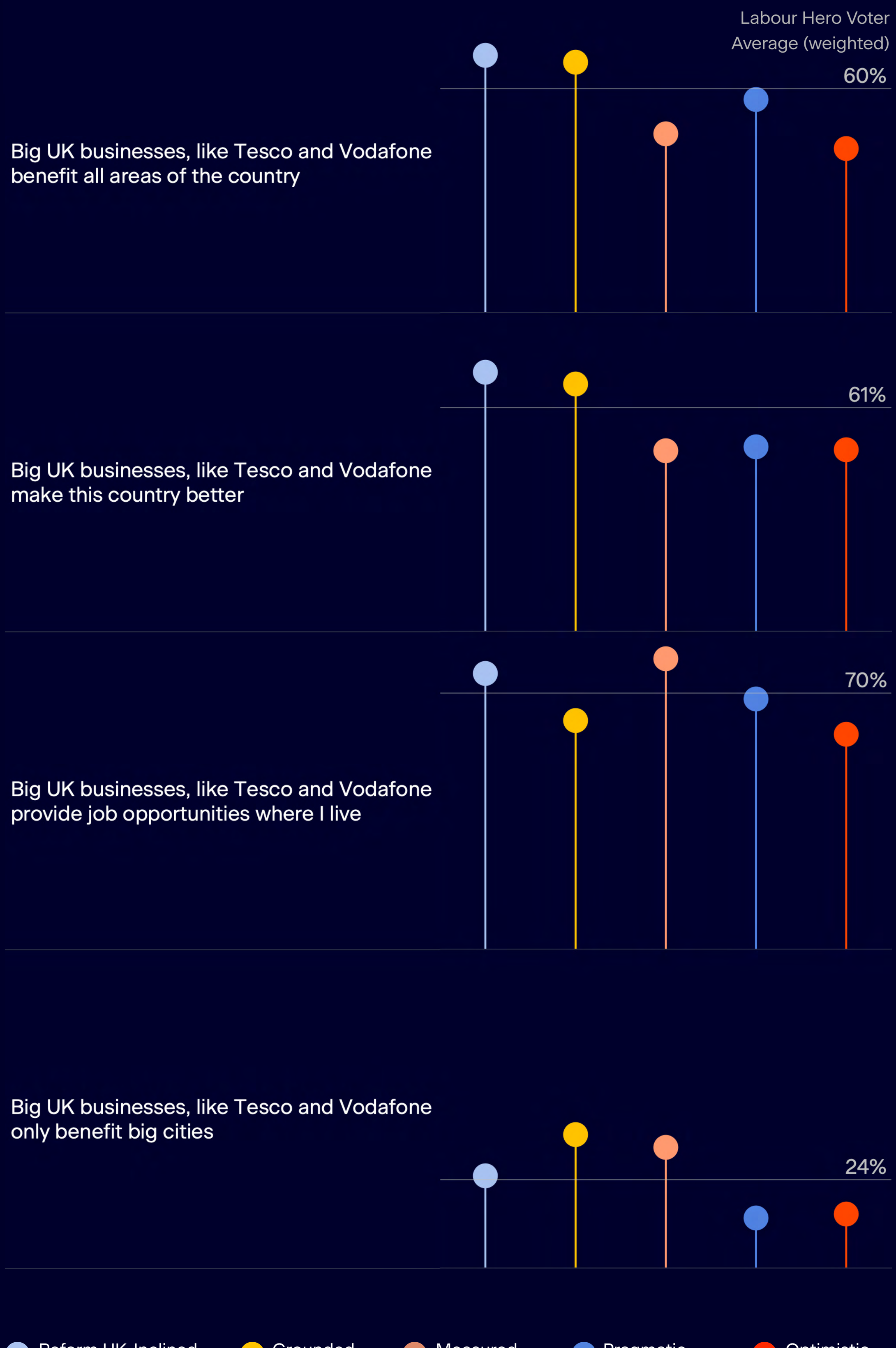
Labour’s Hero Voters look for greater societal contribution from big business, and believe that there is more to do on rights at work.

The greater the size of the circle the higher the agreement with the statement. Consistent wide circle sizes denote high levels of agreement across segments.



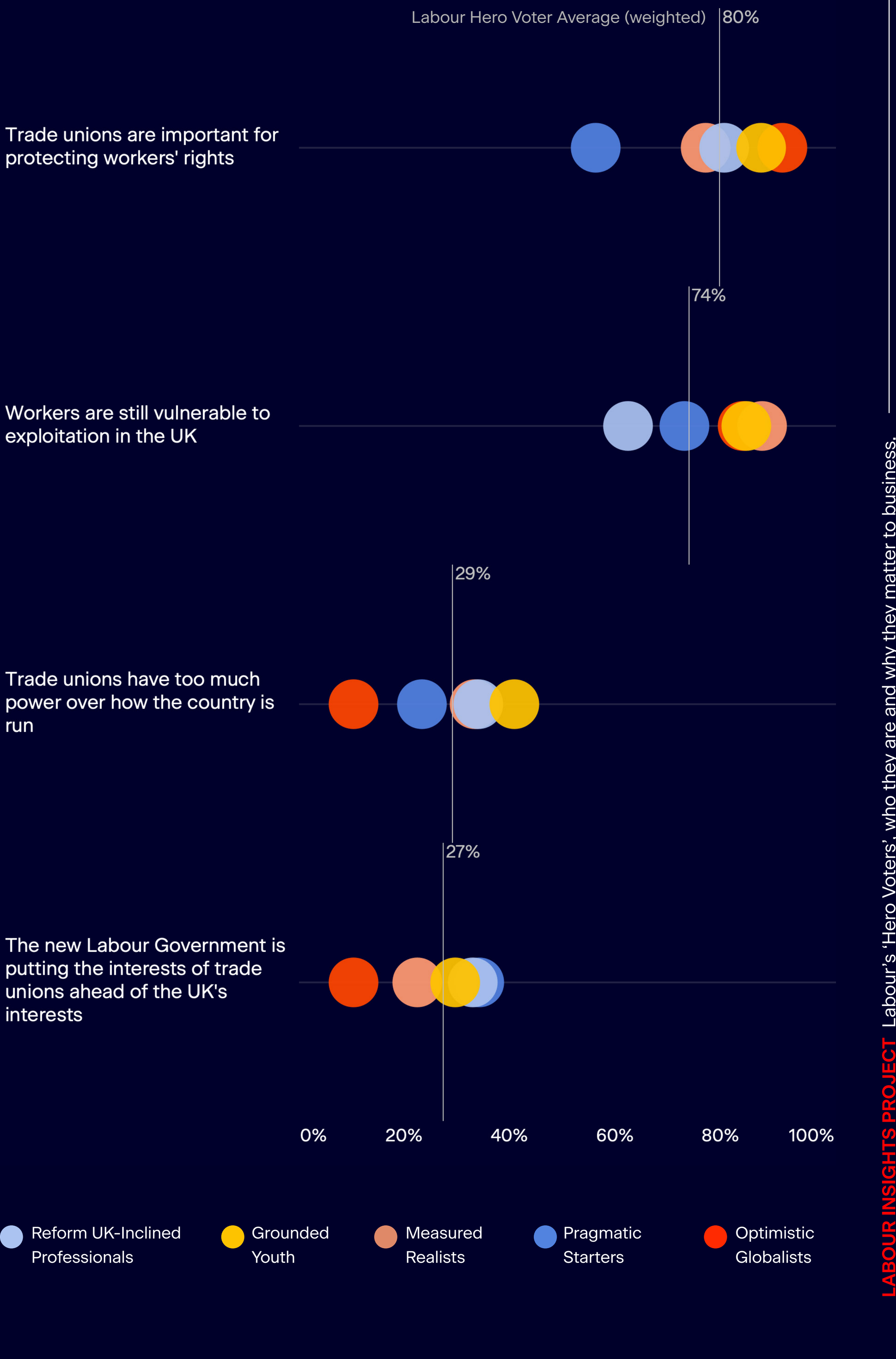
While there is middling recognition of businesses' impact in local communities, there is an opportunity to strengthen this perception with Hero Voters.

The higher the position of the circle the more each segment agrees with the statement.



As an important partner to the new Labour Government, trade unions do not only hold sway within the party, but also with the wider UK electorate.

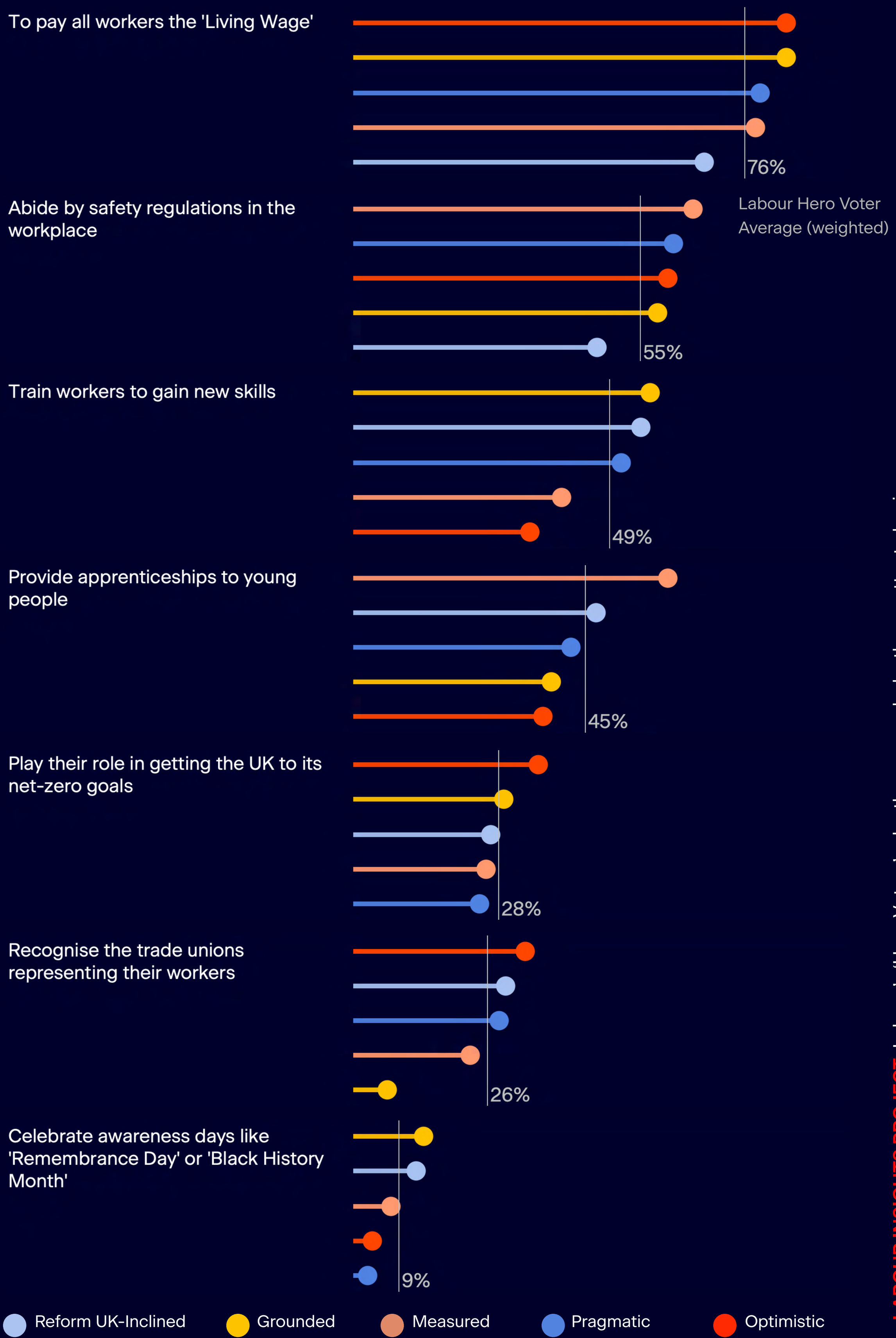
Circles positioned further to the right indicate segments' higher agreement with the statement.



LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.

Enhanced wages and safety regulation, apprenticeship opportunities and equipping workers with new skills provide opportunities for engagement.

Priorities are ranked by the proportion of Hero Voters who selected them as one of their top three priorities for what big UK businesses should provide their workers.



LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.

What this means for your business

LABOUR INSIGHTS PROJECT Labour's 'Hero Voters', who they are and why they matter to business.

Key takeaways on Labour's Hero Voters and why they matter

ONE

The New Deal for Working People is not about pleasing Labour-affiliated trade unions - it is a direct response to a target group of voters who have become sceptical of big business and want to see government deliver a pro-worker and pro-business agenda.

TWO

Trade unions are partners to engage with on shared agendas, not least on driving economic growth, productivity and a fair transition to a decarbonised economy. Hero Voters see them as important defenders of workers' rights.

THREE

Parliamentary seats with the highest indexing groups of 'Hero Voters' have new Members of Parliament who can become powerful allies to advocate for policies and delivery. Showing them impact in their constituencies will be key if they are to advance policies and government delivery.

FOUR

Resources should be more focused on delivering on the agendas above, with less time and resource on awareness days and communications activity that are not aligned with the strategic priorities of the new government.

FIVE

Think about which Hero Voters are most relevant to your business or your campaigns, and therefore how to tailor engagement to these audiences. (The government will be thinking in the same way).

SIX

Labour sees increased economic activity as a prerequisite to growing the UK economy. The workforce – not just rights at work – is a priority area of public policy across government departments. Government is looking for partners to address economic inactivity, including reskilling, routes to work and training.

Labour’s new ‘Hero Voters’ are sceptical of big business, want more rights at work and provide ‘political cover’ for Labour’s ‘New Deal for Workers’

The data reveals that the government has political cover to challenge business leaders to align with their new reforms to rights at work, including on the right to switch off.

“The government has political cover to encourage business leaders to align with its programme of reforms to rights at work. It’s clear that voters have not bought into narratives suggesting that Labour is governing in the interests of unions ahead of the interests of the country.

Unlike in 1997 when the parliamentary party was to the left of the new voter coalition, attitudes to work and workers’ rights have shifted as scepticism toward big business has increased. Rather than defending the status quo, businesses will be better to partner with government and trade unions on collective efforts to increase productivity with forward thinking practices and investing in the workforce for the longer term.”

Adam McNicholas, Senior Advisor at Stonehaven and Director of Messaging at the Labour Party during the 2024 election.

“It would be wrong for business leaders to assume that Labour’s New Deal for Working People is a pitch to the core voter base of the party. Labour’s broad-based coalition of voters, secured at the election, has an expectation that the new government will reform working practices in line with societal changes.

This is not about satisfying the party base – it is part of the strategy to consolidate Labour’s new electoral coalition. And that means, for the government, delivering on this mandate.”

Keir Cozens, Senior Government Relations Advisor at Stonehaven and former Director at the Labour Party.

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To discuss the findings in Report 1 or to receive future reports, please get in touch.

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