

JANUARY 2025  
PETER KELLNER  
RYAN WAIN  
JO PUDDICK  
ALAN WAGER  
JONI SMITH  
ROBERT JOHNSON  
KAYLA CROWLEY-  
CARBERY  
ALEX OTWAY



# Disruptive Delivery: Meeting the Unmet Demand in Politics

# Contents

- 3 Executive Summary
- 5 Today's Politics: A Study in Market Failure
- 8 Outsiders Versus Insiders
- 17 Introducing the Five New Coalitions in Democratic Politics Today
- 21 Demand: What Are Voters Looking For?
- 28 Supply From the Centre: Transformative Delivery
- 37 Conclusion
- 39 Methodology
- 40 Annex: Explaining the New Coalitions



## Executive Summary

Around the world, democracy is changing shape. Trust in politicians is declining, as is respect for all kinds of authority. Traditional political loyalties have dissolved as economic and social forces buffet people's lives and a pervasive sense of decline takes hold. More and more voters seek easy solutions to complex problems.

One consequence is that party systems are fragmenting and voters are becoming more volatile. Insurgent politics – demanding a change to the status quo – feeds off this, sometimes in the form of new parties, sometimes in pressure to transform traditional parties.

What is to be done? Is there an alternative that neither defends a crumbling status quo nor succumbs to the divisive simplicities of angry insurgency?

This report draws on a survey commissioned by the Tony Blair Institute for Global Change and conducted by Deltapoll of 12,000 voters in six large democracies: the United Kingdom, Germany, France, Canada, Australia and the United States. It uncovers the nature of the realignment that new parties have been able to exploit. It finds that the range of views is remarkably similar across all six countries, regardless of the current level of support for insurgent parties. Economic pessimism, fear for the future and distrust in the establishment are common to all. Across much of the democratic world, many millions of voters feel they live in broken societies that urgently need to be repaired.

These are the roots of widespread discontent, whether it is promoted by insurgent leaders or, so far, contained within established parties. However, in the main it is not the **ideology** of mainstream politicians that growing numbers of voters deplore – but their **competence and integrity**. Our research makes clear the demand for trustworthy governments that ensure freedom, security, prosperity and the services such as health care on which we all depend.

Linked to this is the diminishing relevance of the old ideologies of “left” and “right” to troubled voters. What is happening reinforces the trend away from the class-based loyalties that dominated industrialised societies in the second half of the 20th century. The way competence and debates about values have overtaken ideology as the main drivers of voters’ choices help to explain the long-term decline of parties rooted in the old contest of left versus right. Voters no longer feel beholden to the party loyalties of their grandparents and increasingly do not see themselves as “left-wing” or “right-wing”. Volatility is now a permanent feature of our politics. For the political centre this could be existential.

The message from our research to progressive and mainstream parties is stark: disrupt or be disrupted. Permanently. Our paper shows that the coalitions of support that have sustained progressive and mainstream parties are breaking down – and that this is accelerating.

This breakdown need not be irretrievable. Voters agree on a lot across the political spectrum; there is an opportunity to forge a new progressive coalition. But this coalition will not be forged by clinging to the wreckage of the old ways of doing things. It needs a complete deconstruction and reconstruction of the way progressive and mainstream parties do their politics. At its core this change must be rooted in the embrace of an agenda we call **disruptive delivery**.

This means disruptive to the old paradigms of left and right, both in identifying problems and solutions. Disruptive in its embrace of the new and the innovative to deliver transformative rather than slow, incremental change – artificial intelligence and other new technologies have a vital part to play. And finally disruptive to the daily feeds of information influencing the increasing number who have all but given up on mainstream politics – a group we call the Outsiders.

Above all else, it must have a clear-eyed focus on the delivery of an agenda to reverse decline and positively transform a country.

# 02

## Today's Politics: A Study in Market Failure

As with the world of business, democratic politics is ultimately a matter of supply and demand. However, the two differ crucially in their response to changing market conditions. Typically, we “vote” weekly on where to buy our food and annually on where to take our summer holiday. We can choose when to buy a new phone or change our gas and electricity supplier. Companies that make mistakes discover them quickly and have the chance to change – and to adjust their plans again and again. Change is a continuous, dynamic process in a competitive world where the impact of failure can be fast and brutal.

National governments are normally chosen far less frequently. Customer feedback is available continuously, notably from opinion polls, but catastrophe threatens only at election time. This is an inevitable effect of practical politics. National elections every six months, for example, would certainly speed up the feedback-response process, but the cost to stability and long-term planning would be ruinous.

All this mattered less when most democracies were dominated by two big parties, one on the centre-left, the other on the centre-right, living standards were rising and most voters were happy with their choice at election time. Supply and demand were in balance and for those political parties, there was a pendulum in play: lose power, reassemble in opposition and your time will come again.

This is no longer the case.

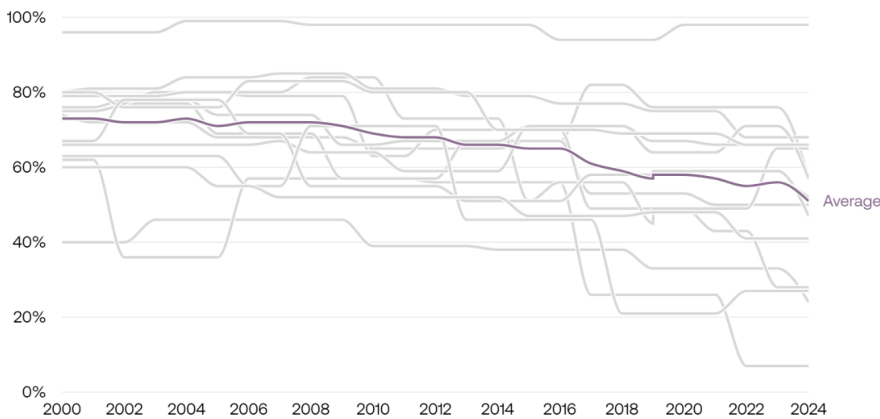
Our extensive polling confirms the growing disconnect between mainstream political supply and the evolving expectations of modern voters. Whatever voters are looking for, they increasingly seem to doubt that it can be delivered by the parties they have traditionally elected to office. This is best evidenced by the rapid decline of traditional social-democratic and centre-

right parties across advanced Western democracies, which has continued at pace in 2024 – from three-quarters of the vote share at the start of the century to just over half today.

FIGURE 1

## Across developed democracies in the West, previously dominant social-democratic and centre-right parties have declined

Vote share for predominant centre-left and centre-right parties in Western and Northern Europe, North America and Australia (population > 5 million)



Source: TBI analysis

Meanwhile, another trend has begun to crystallise: economic anxiety and disillusionment with democracy are engulfing incumbents everywhere, further destabilising centrist coalitions. In many democracies, including the United Kingdom, centrist parties are being squeezed as voters shift towards more polarised or alternative options. The 2024 UK election exemplifies this trend, with Labour and the Conservatives securing a combined 58 per cent of the popular vote – their lowest collective share since Labour overtook the Liberal Party in 1922.

Two adjectives are frequently used to describe the voters who have drifted away from the mainstream parties: “volatile” and “populist”. Both words conceal a deeper truth. Our survey finds that voters are more fragmented in their choice of party, but more united in their underlying demands than they appear. They know what they want and it is not new. What many millions of them are unhappy with are the way things are now and the choice on offer for making things better. This mismatch between broadly similar demands and increasingly polarised supply is a classic case of market failure.

## 03

## Outsiders Versus Insiders

In order to measure something – anything – it must first be defined. Tax revenue can be defined, so can sporting records, a car’s speed and the price of bread. But populism?

Back in 1967 the London School of Economics convened a conference to discuss this very issue. At the end, its chairman, Sir Isaiah Berlin, admitted defeat in the quest “to formulate some kind of model or definition or formula into which we can fit all the various types and nuances of populism which have been discussed”. Half a century later, we should not be surprised if we still struggle with a problem that one of the 20th century’s finest philosophers could not solve.

Rather than getting sidetracked by arguments about the definition of “populism”, this report uses different words for people on the opposing poles of political discourse: Outsiders and Insiders.

- Outsiders feel that they are victims of a political system run by a remote elite that fails to address their needs. They suspect that “experts” are often serving their own interests by bamboozling the public with complex arguments about decisions that are really quite simple. Many Outsiders have given up on mainstream politics. They yearn for a strong government that does away with all the mumbo-jumbo and takes common-sense decisions.
- Insiders also want change but believe that modern societies are complex and that change needs to take account of the best independent evidence. They accept that not everybody can get all they want and that the give-and-take of open debate is vital to democracy. Many Insiders sympathise with at least some of the points made by insurgent parties, but fear that in power such parties would do more harm than good.

Outsider and Insider are not ideal labels. Probably no pair of words is. Moreover, as with any attempt to allocate voters to broad attitudinal groups, we find that many voters display a mixture of both Outsider and Insider tendencies. But more than half of the people in our multi-country survey fall



clearly into one of the two groups. This allows us to compare different countries and to measure the drivers and impact of the increasing polarisation of political contest within each country.

To classify respondents as either Outsider or Insider, and to compare the six democracies we have surveyed, we combined the responses to three pairs of statements. In each case, respondents were asked to say which came closest to their view on a scale of 1 (agree totally with the red statements) to 10 (agree totally with the blue statements). We classified as Outsiders those who gave responses 1-3 on at least two of the three pairs of statements, and as Insiders those who responded 7-10 at least twice.

FIGURE 2

## More than half of those in our multi-country survey fall clearly into one of two groups: Outsiders and Insiders



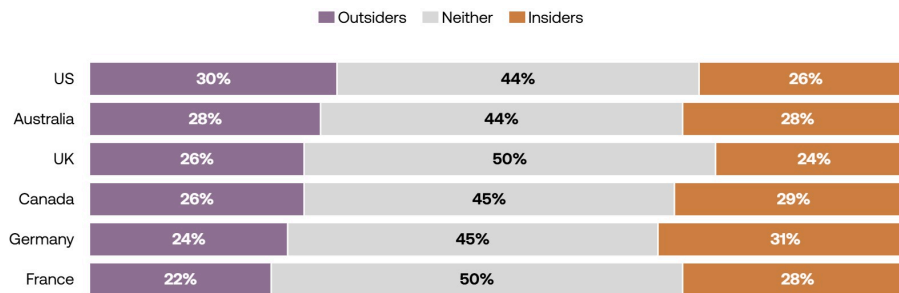
Source: Deltapoll for TBI

Two main conclusions can be drawn from the results.

The first is that the broad distribution of voter sentiment bears little or no relationship to the country-by-country impact of insurgent parties. In every case, the proportions in each category are within 3-4 percentage points of Outsiders at 26 per cent, Insiders at 27 per cent and neither at 47 per cent. Multi-country studies seldom demonstrate such consistency. Insurgent parties exploit Outsider sentiment; they have not created it, and Outsiders should be seen as very much “in play” for mainstream parties.

FIGURE 3

## The distribution of Insider and Outsider voter sentiment is unusually consistent across the countries surveyed



Source: Deltapoll for TBI

The second broad conclusion is that voters at both ends of the spectrum actually agree on quite a lot. To be sure, they differ markedly on their support for international cooperation, whether life was better in the past, their trust in politicians and their faith in the news broadcast by mainstream television channels. On the other hand, voters across the board are worried by the rising cost of living and the lack of affordable housing. Their views overlap to a large extent on free trade (broadly favourable, especially among Outsiders). If forced to choose, they prefer their government to be competent rather than one that subscribes to their own values and ideology. (The exception is France, where Outsiders tend to put ideology before competence – a rare example of the polarisation of the party system changing attitudes.)

The opposing groups differ on immigration and climate change – but many Insiders are worried by the numbers of people coming to live in their country, while many Outsiders agree that human activity is causing the world to get warmer.

Perhaps the most telling single finding concerns people's long-term expectations for today's children. By 54 to 31 per cent, Outsiders expect them to end up worse off than their parents. But by 44 to 28 per cent, so do Insiders. In the second half of the 20th century, living standards in the Western democracies roughly doubled in each generation. The observation that this has stalled and the fear that it will go into reverse have fed the appetite for insurgent politics. But the malaise goes wider and deeper.

THE OUTSIDERS

## Who are the Outsiders? The role of age and education in attitudes to the political system

It is commonly said that the typical populist is often older than average and less likely to have a university degree.

Applying our definition of Outsiders, we find that this has some truth for three of the six countries we surveyed. However, even there, the similarities among different groups are greater than their differences.

Australia has the most distinct age profile, with Outsiders comprising 41 per cent of people over 65 compared with just 12 per cent of those aged 18 to 24 – a generation gap of 29 percentage points. The generation gaps for other countries are far smaller: United States, 13 points (over 65s, 34 per cent; under 25s, 21 per cent) and the United Kingdom, 12 points (31-19). The gap for the other three countries is small enough to be explained by sampling error: Germany, 3 points (24-21); France, 1 (22-21); and Canada, minus 1 (26-27).

FIGURE 4

## Comparing percentages of Outsiders by age across countries

Fewer outsiders    More outsiders

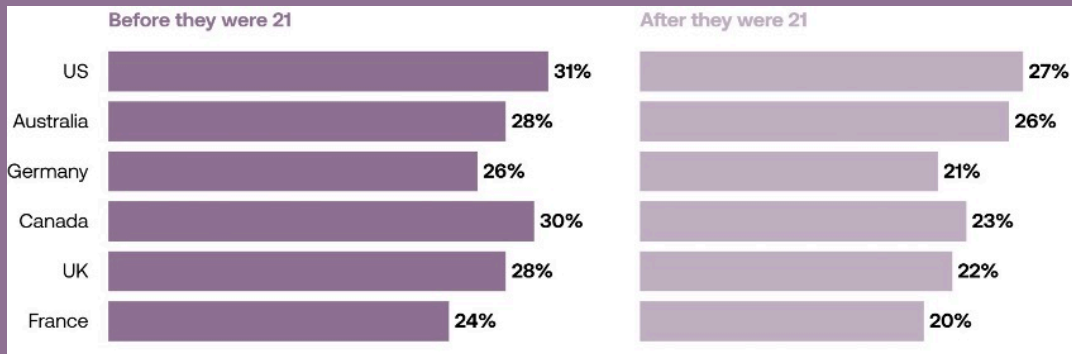
Country	18-24	25-34	35-54	55-64	65+
All	20%	24%	25%	28%	30%
US	21%	28%	29%	32%	34%
Australia	12%	22%	27%	29%	41%
Canada	27%	25%	26%	27%	27%
UK	19%	24%	24%	31%	31%
Germany	21%	23%	25%	27%	24%
France	21%	24%	21%	22%	22%

Source: Deltapoll for TBI

In each country, people who ended their education before they were 21 are more likely to be Outsiders than those who stayed on until they were 21 or older. However, as Figure 5 shows, the differences are small, ranging from seven points in Canada (finished education before 21, 30 per cent; after 21, 23 per cent) to just two in Australia.

FIGURE 5

## Percentage of Outsiders in each country who ended their education before age 21 versus after age 21



Source: Deltapoll for TBI

Overall, the clear message from this and other results from our survey is that Outsiders are found in significant numbers among all the main demographic groups in each country.

One significant finding is that the division between the rival groups is NOT fundamentally between radical change and the status quo. Both groups seek honesty, competence and effective reform. The underlying problem for the centre is that it has been losing the reputation for offering these things.

The argument is not so much between different visions of the change that voters want but between the kind of political processes and leadership that command public confidence. Outsiders want a fundamental clear-out; Insiders want the mainstream actors to get their act together.

Taking all this together, the growing drift among voters away from traditional parties should be seen not just as a problem for the centre, but as an opportunity. Success in the centre ground has never been, nor need be now, about defending the status quo, but about advancing dynamic, inclusive change and persuading voters of its ability to succeed.



# 04

## Introducing the Five New Coalitions in Democratic Politics Today

To build on our broad analysis of the Outsider/Insider divide, and to understand the market failure in politics today, we have identified five distinct groups of political parties across the six countries we surveyed.

Using a machine-learning method called “k-means”, we clustered more than 20 political parties across the six countries we polled. This allows us to identify five groups of parties whose voters share the most in common with one another.

These new coalitions are:

- The Insurgent Right
- The Insurgent Left
- The Established Left
- The Traditional Centre
- The Established Right

These new party labels are derived from the actual concerns and priorities of the 12,000 voters we surveyed (see Annex for further details). This allows us to move beyond often pejorative or outdated labels that pigeonhole voters. Comparing across countries allows us to demonstrate the structural disruption in the new politics. Testing a programme of disruptive delivery across these coalitions can uncover what messages can appeal across these new divisions.

It is important to note that these coalitions are a function of both longstanding institutions and the disruption that is taking place across democratic systems. Take two examples that might be surprising but explain the value of this exercise.

The UK Conservative Party forms part of the “Traditional Centre” group. This is because much of its old electoral coalition has been lost to the insurgent Reform UK. It tells us that the average Conservative voter as it stands is located relatively close to the political centre, compared to some other centre-right parties.

Donald Trump’s Republican Party forms part of the “Established Right” coalition. This is because of the (increasingly unique) two-party system in the United States and the broad nature of the Republican coalition. The average Republican voter sits to the right of many other parties – but the Trump coalition contains many Insiders (drawn to Republicans by a belief in meritocracy and low taxation) as well as Outsiders with low trust in political institutions.

## Insurgent Right

This group makes up 10 per cent of our sample. It includes voters for:

- Marine Le Pen, National Rally (France)<sup>1</sup>
- Reform UK (UK)
- Alternative for Germany (AfD) (Germany)
- People’s Party (Canada)

This coalition has the lowest income levels in our sample and the lowest proportion of college-educated individuals.

It has the lowest trust in institutions and the establishment, the least economic optimism for the future and the most “closed” social values.

Of all the voter coalitions, this group places most importance on immigration.

## Insurgent Left

This group makes up 13 per cent of our sample. Voters are likely to support:

- Jean-Luc Mélenchon, La France Insoumise (France)
- New Democratic Party (Canada)
- Greens (Australia)
- The Left (Germany)
- Green Party (UK)

This coalition is the youngest sample in the group. It has the most open social values and a strong sense that the economy is unfair.

It has left-wing economic views and very low trust in the establishment.

## Established Left

This group makes up 37 per cent of our sample. Voters tend to back:

- Democrats (US)
- Labor Party (Australia)
- Labour Party (UK)
- Liberal Party (Canada)
- Social Democratic Party (Germany)
- Alliance 90/The Greens (Germany)
- Liberal Democrats (UK)
- Scottish National Party (UK)

This coalition has the highest proportion of college-educated individuals and its social values are almost as liberal as the Insurgent Left.

It is the most optimistic about economic progress. It has open political values and high levels of trust.

## Traditional Centre

This group makes up 26 per cent of our sample. Voters typically back:

- Emmanuel Macron, Renaissance (France)
- Liberal Party (Australia)
- Conservative Party (UK)

- Christian Democratic Union (Germany)
- Free Democratic Party (Germany)
- Liberal National Party (Australia)
- Bloc Québécois (Canada)
- National Party (Australia)
- Green Party (Canada)

Voters are defined by their moderation on economic and social issues and retain some trust in political institutions.

They are a very middling group; on all five values they sit somewhere in the middle. They have the second-lowest educational-attainment level.

## Established Right

This group makes up 14 per cent of our sample. Its voters include:

- Better-off supporters of Donald Trump (US)
- Conservative Party (Canada)
- Christian Social Union (Germany)

This coalition is in the two highest income quartiles, has the greatest belief in an existing meritocracy and support for privatisation, low tax and restrictive welfare.

# 05

## Demand: What Are Voters Looking For?

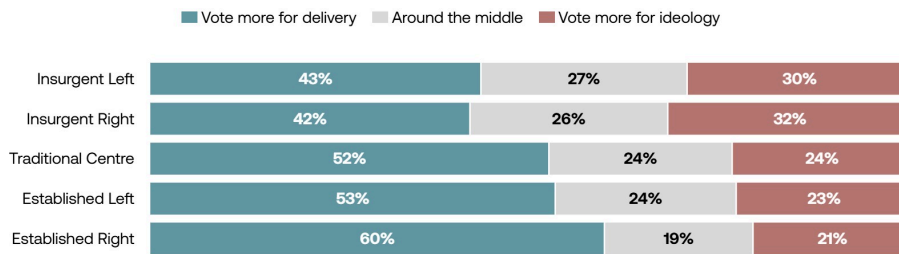
Testing public support for an agenda for the progressive centre can tell us what can unite groups of voters so often written off as having little in common.

For example, the idea that delivery no longer comes with a political dividend is increasingly prevalent. Many argue that voters have fundamentally changed their priorities, favouring parties that share their values over those that deliver material improvements in their lives and better public services. However, the evidence simply does not back that up.

We found a preference for leaders who demonstrate competence over those driven by specific values across our voter groups and countries surveyed.

FIGURE 6

## Across the five coalitions, voters favour politicians who deliver the best outcomes over politicians who share their ideology



Q: Is your view closer to statement A or statement B?

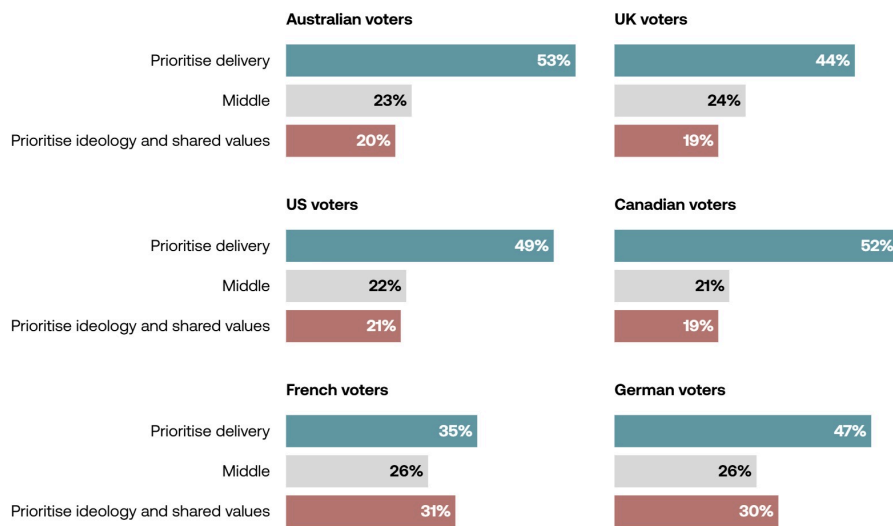
A: I tend to vote for politicians that deliver the best outcomes for the country, in terms of better public services and economic growth, rather than politicians with a particular ideology.

B: I tend to vote for politicians that share my values and ideology, rather than voting based on their competence and ability to deliver.

Source: Deltapoll for TBI

FIGURE 7

## Across the countries surveyed, voters favour politicians who deliver the best outcomes over politicians who share their ideology



Q: Please indicate whether your view is closer to statement A or statement B.  
 A: I tend to vote for politicians that deliver the best outcomes for the country, in terms of better public services and economic growth, rather than politicians with a particular ideology.  
 B: I tend to vote for politicians that share my values and ideology, rather than voting based on their competence and ability to deliver.  
 Prioritise delivery = closer to A  
 Prioritise ideology and shared values = closer to B

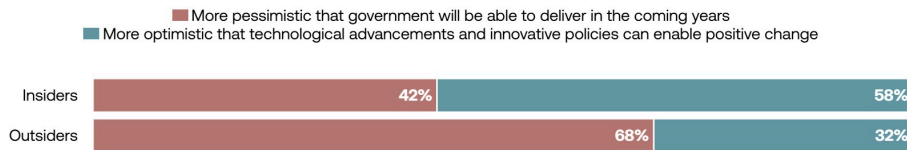
Source: Deltapoll for TBI

The initial phase of our research into demand looked at what is pushing voters towards “anti-politics” sentiment. As we have seen, around a quarter of voters – who we have called Outsiders – share a set of preferences, seeing change as only coming from outside the mainstream and backing “strongman” leaders, with a belief in common sense over independent evidence and low trust in the power of electoral politics.

These voters are driven in part by nationalism and nostalgia. They have also contributed to a clear crisis of trust – not just in politics but in established institutions from the press to the judiciary. We also found voters rejecting mainstream politics while also demanding competence on public policy and the economy. Although many voters agree that technological advancements and innovative policies can make positive change, outsiders with less trust in politicians are much more pessimistic.

FIGURE 8

## Voters, including Outsiders, demand delivery but differ on how optimistic they are that it can be achieved



Q: Please indicate whether your view is closer to statement A or statement B?  
 Statement A: Over the next few years, growing challenges from climate change, geopolitical instability and an ageing population will make it impossible for the government to deliver better public services and an economy with greater jobs and opportunities.  
 Statement B: Over the next few years, new technological advancements and policy ideas will emerge which will allow the government to meet the growing challenges it faces.  
 Responses were provided on a 1-10 scale, where 1 = very close to statement A and 10 = very close to statement B.

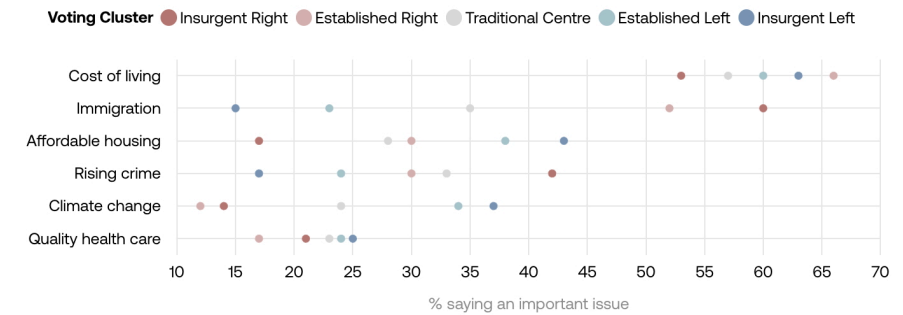
Source: Deltapoll for TBI

Many voters have clear priorities. No matter how capable governments are, if they do not deliver on the one or two issues that matter most to them, they will not be supported. Concerns about the cost of living unite voters across the spectrum and should therefore be the central delivery objective of governments. Delivery on issues around tackling immigration, housing and crime are also driving demand across the electorate. Performance on these issues matters electorally, not just socially.



FIGURE 9

# The key policy demands that voters want delivered, by voting coalition



Cluster	Biggest issue	2nd biggest issue	3rd biggest issue	Biggest issue %	2nd biggest issue %	3rd biggest issue %
Insurgent Right	Immigration (60%)	Cost of living (53%)	Rising crime (42%)	60.00	53.00	42.00
Insurgent Left	Cost of living (63%)	Affordable housing (43%)	Climate change (37%)	63.00	43.00	37.00
Traditional Centre	Cost of living (57%)	Immigration (35%)	Rising crime (30%)	57.00	35.00	30.00
Established Right	Cost of living (65%)	Immigration (52%)	Rising crime (30%)	65.00	52.00	30.00
Established Left	Cost of living (60%)	Affordable housing (38%)	Climate change (38%)	60.00	38.00	38.00

Source: Deltapoll for TBI

Finally, our mapping of demand found a loss of economic opportunity feeding the extremes. Our data show that the voters who are gravitating away from mainstream parties – those members of the Insurgent Left and Insurgent Right coalitions – are driven by a growing belief that economic progress for them and their children is unlikely.

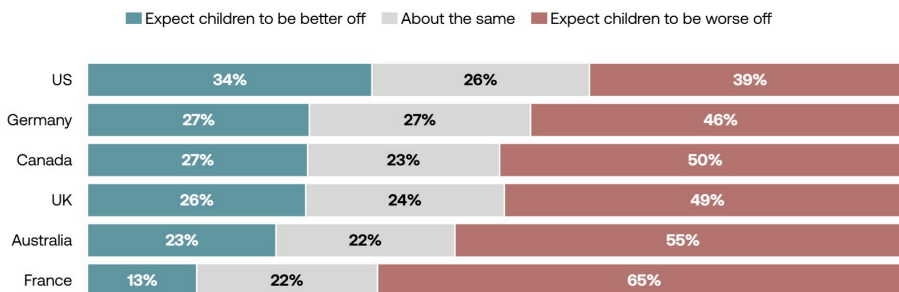
Parties within the coalitions with the lowest economic optimism across our polled countries include the AfD in Germany and Reform UK, along with voters for Jean-Luc Mélenchon and the Green Party in the UK. Voters who are less likely to believe in the generational bargain – that children growing

up today will end up financially better off than their parents – are moving to disruptors on the left and right. This is in many ways a rational demand-led response to a feeling of managed decline. Something has to change.

We should note that while the Insurgent Right is the most fearful for the prospects facing today’s children, it is far from alone in worrying about the future. In every coalition, more people say today’s children will end up worse off than their parents. This finding is in line with the similarity of Outsider and Insider opinions noted earlier. And, as with most questions in these surveys, the pattern is broadly similar across all six countries.

FIGURE 10

## Substantial cohorts across all six countries expect the next generation to be worse off



Q: Do you think children growing up in [your country] today will end up financially better off or worse off than their parents?

Source: Deltapoll for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

Even in the United States, by some margin the most optimistic of the six countries, more people say “worse off” than “better off”. It’s not that outsiders are uniquely pessimistic, rather that the parties they support manage to exploit widespread concerns in each political, social and demographic group.

The lesson for mainstream parties in the Western democracies is that they need to regain the trust of those voters who have not seen the system working in their favour. Such voters are found in each of the five coalitions, albeit in greater numbers in some than others. The need for trust is common to them all. The key thing is that the five-way division of coalitions flows largely from the actions of politicians, not the basic wishes of voters. Insurgent leaders embrace radical change. Established leaders often fear it would be unpopular. It is because that division compounds more traditional political divisions that the story of today's politics is one of fragmented supply rather than fragmented demand.

What, then, is to be done? In previous reports, TBI has made the case for the complete reimagining of the state. Can a radical-yet-practical package of reforms carry popular support across today's different coalitions? Having established the contours of today's electorates, our survey tests the potential for a radical centre willing to take ambitious, transformative actions – opposed to the status quo, un beholden to special interests and insurgent in the way it communicates.

# 06

## Supply From the Centre: Transformative Delivery

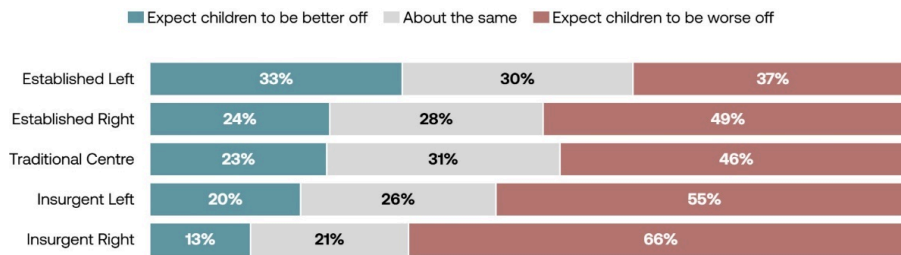
### The Restoration of Economic Opportunity Is Essential

Five of the six countries surveyed – the United Kingdom, Germany, France, Canada and Australia – are grappling with weak or stagnating economic growth. While the United States has demonstrated stronger GDP performance, progress elsewhere has largely stalled. Aspiration is increasingly out of reach and prosperity feels unattainable for many. This economic disillusionment stems from two interrelated challenges: prolonged stagnation that has persisted since the 2008 financial crisis and the more recent pressures caused by rising living costs following the Covid-19 pandemic and the economic disruptions of the Russia-Ukraine conflict.

Our research reveals that this decline in economic opportunity is a significant driver of the shift away from centrist policies and towards political extremes. Voters gravitating away from mainstream parties – such as those in the Insurgent Right and Insurgent Left groups – share a growing belief that economic progress, both for themselves and future generations, is unlikely, leading them to align with disruptors on both the left and right.

FIGURE 11

## Voters shifting away from traditional parties are more sceptical about the next generation's prosperity



Q: Do you think children growing up in [your country] today will end up financially better off or worse off than their parents?

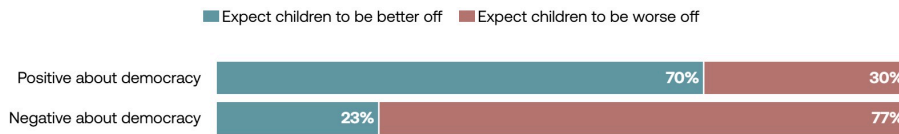
Source: Deltapoll for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

However, a key distinction emerges between these groups. Right-leaning groups often retain a belief in hard work as a path to personal advancement, whereas left-leaning groups are more likely to see systemic barriers as insurmountable without significant structural change. This divide underscores the growing polarisation in how people perceive the pathways to progress.

Ultimately, restoring economic opportunity is essential because it addresses the root causes of political polarisation and disenchantment, offering people a renewed sense of hope and shared prosperity. Without it, continuing stagnation will continue driving voters towards political extremes, undermining democracy and weakening the societal bonds that hold communities together.

FIGURE 12

## People’s feelings on democracy are a key determinant of their economic outlook



Q: Do you think children growing up in [your country] today will end up financially better off or worse off than their parents?  
Q: Which, if any, of the following words describe your feelings about the way democracy works these days? (Options included: Uneasy, Hopeful, Disgusted, Angry, Confident, Afraid, Happy, Proud)

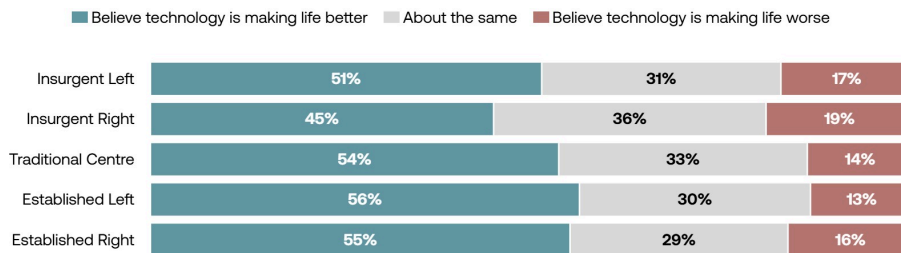
Source: Deltapoll for TBI

## The Public Support Technology but Need to See Its Impact on Services

Delivery centred on the role of technology resonates with the public mood. Voters from across the emerging divides in modern politics can recognise the transformative potential of technology and are ready to embrace solutions that harness its power to address societal challenges effectively. This provides a unifying political narrative – “the Reimagined State” – capable of bridging divisions and resonating with voters in all ideological camps.

FIGURE 13

## Voters across the new political divides believe in the power of technology to make life better



*Q: In general do you think modern technology is making life better or worse for people like you?  
Responses were provided on a 1-10 scale, where 1 = technology is making life much worse and 10 = technology is making life much better.*

Source: Deltapoll for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

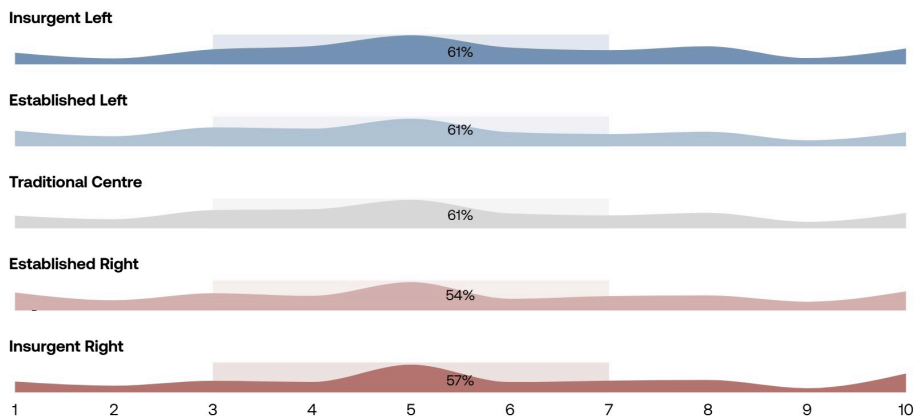
Mapping voter attitudes towards technology reveals “tech optimism” when it comes to people’s own lives. People think modern technology makes life better. However, there is distrust in whether mainstream politicians can properly harness it to make things better. Voters across countries and party coalitions are more divided on whether or not technological change will translate into better public services and stronger economic growth.

The positive case for technology will need to be made by showing, rather than telling, a sceptical public that governments are capable of these reforms. This means demonstrating that the transformation voters see in their own lives can also be something achieved by reform of public services and in changes to the way they interact with services like schools, hospitals and the police. Across all coalitions, most voters place themselves between a 3 and a 7 out of 10 on the AI optimism scale – persuadable, but still to be convinced of its likely impact on public services.

FIGURE 14

## Voters across coalitions see potential in AI's role in public services but need proof it can deliver

A majority put themselves at a 3-7 (shaded rectangles below) on a scale where 1 indicates optimism in AI's potential



*Q: Please indicate whether your view is closer to statement A or statement B.  
Statement A: New technologies like AI are likely to allow governments to grow the economy faster and provide better public services for future generations.  
Statement B: New technologies like AI are likely to damage economies and make public services worse for future generations.  
Responses were provided on a 1-10 scale, where 1 = very close to statement A and 10 = very close to statement B.*

Source: Deltapoll for TBI

## There Is Broad Support for Health-Care Reform

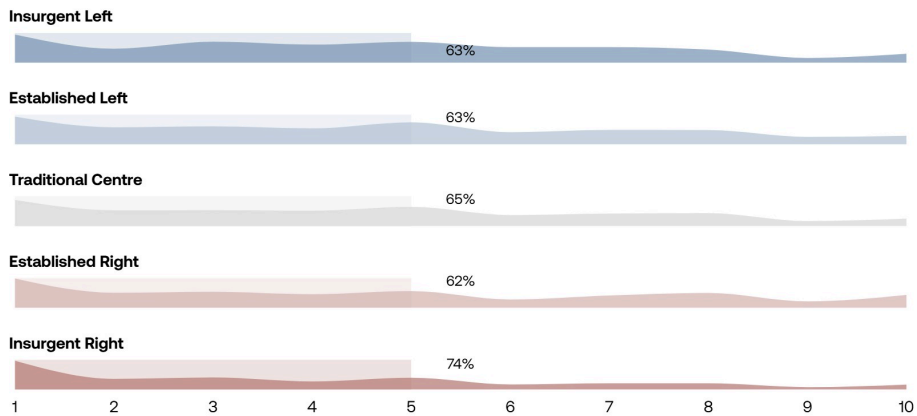
Health-care spending will continue to grow as we live longer but not necessarily healthier lives. Across our cross-national coalitions, there is broad support for the idea that health-care systems require significant reform if they are to meet the needs of demographic change and ageing populations, and adapt to advancements in technology.



FIGURE 15

## Voters across coalitions oppose the status quo on health care and favour reform

A majority put themselves at 1-5 (shaded rectangles below) on a scale where 1 indicates belief that the whole health-care system requires radical reform



Q: Please indicate whether your view is closer to statement A or statement B.  
Statement A: If people in [my country] are to receive good health care in the years ahead, the whole health-care system needs to be radically changed.  
Statement B: A few tweaks to the health-care system should be enough to make sure that people in [my country] can receive good health care in the years ahead.  
Responses were provided on a 1-10 scale, where 1 = very close to statement A and 10 = very close to statement B.

Source: Deltapoll for TBI

Such findings should be treated with care. “Radical change” can mean very different things to different people. The key thing is that defenders of the status quo are in a minority. The need – and opportunity – for practical progressives is to reclaim their reputation as the champions of change, rather than allow insurgent parties to seize this for themselves.

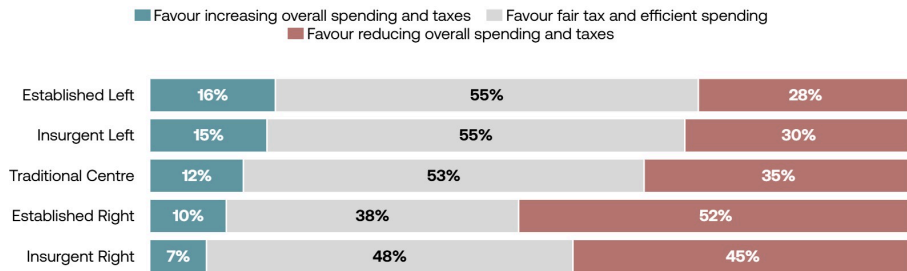
## Transformative Action Does Not Mean a More Expensive State

Some will point to higher taxes as the answer to the ever-growing demands for reformed and improved public services. Yet voters everywhere are feeling the strain of financial insecurity. A programme of delivery that leans into reimagining the role and function of the state, rather than defaulting to high taxation, has the potential to challenge and disrupt the new divisions in politics today. Across the developed world, the rising proportion of older citizens has added to the financial pressures on health and welfare systems. These pressures will continue and underline the urgent need for radical reform and greater efficiency.

In our first three coalitions below, more than half of the sample is primarily concerned with the efficiency and fairness of taxation and spending. What matters is not the size of the state, but how the state functions. The appetite across the political spectrum for technology which can improve the efficiency of the state is clear. Once again, the story for each of the six countries is similar.

FIGURE 16

## A majority of voters are primarily concerned with the efficiency and fairness of taxation and spending



Q: Please say which statement comes closest to your view.  
 Statement A: It is vital that the government increases its overall spending and, if necessary, increases taxes to pay for it.  
 Statement B: What matters most is not the overall level of spending and taxes, but whether the government of the day taxes fairly and spends efficiently.  
 Statement C: It is vital that the government reduces its overall spending and reduces taxes.

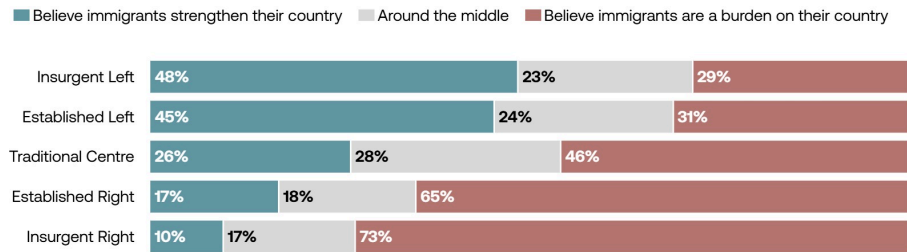
Source: Deltapoll for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

## Anxieties on Immigration Must Be Addressed

Views on migration remain, unsurprisingly, divisive. But there are widespread concerns in all six countries that spread well beyond the ranks of insurgents. For moderate progressive politics, a crucial insight is the level of opposition to progressive migration policies. Policies such as digital ID could help to assuage the concerns of voters who worry about control and help expand the voter coalitions for progressive politics.

FIGURE 17

# Significant numbers of voters across the political spectrum express some scepticism about the impact of immigration



Q: Please indicate whether your view is closer to statement A or statement B.  
 A: Immigrants today are a burden on [my country] because they take our jobs, housing and health care.  
 B: Immigrants today strengthen [my country] because of their hard work and talents.  
 Responses were provided on a 1-10 scale, where 1 = very close to statement A and 10 = very close to statement B.

Source: Deltapoll for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

## 07

## Conclusion

Politics provides the arena in which values, visions and interests are contested in the quest for votes. Different parties dream of different futures. However, stable democracies operate within a culture in which most of their leading actors agree on the things they have in common, not just those that drive them apart.

That state of affairs has started to crumble. A number of mainstream parties are in trouble because the happy era of steadily rising prosperity seems to be over. Voters have become pessimistic and distrustful. Liberal democracy is under threat from insurgent parties that exploit an increasingly polarised debate. They offer alternatives that are not just radical but divisive. This leads to a proliferation of political coalitions that threaten to destabilise democratic politics and force it on to the defensive at the very time it most needs clear thinking and bold leadership.

The challenge for liberal progressives is not to reject radicalism but to embrace it in different ways: a radicalism that brings voters together rather than driving them further apart.

Our research shows that this can be done. Paradoxically, modern technology can offer part of the answer, precisely because it is so disruptive. Deployed properly, it can respond to today's widespread disillusion with a way forward that offers radical change, but in a form that puts competence before ideology. Technology is challenging the very nature of governing in today's world. AI will create completely new ways for political leaders to discharge their duties. In doing so, it has the potential to tackle concerns that affect us all.

The key to bringing coalitions back together is effective delivery. To rise to the challenge of today's and tomorrow's technologies, a clear understanding is needed of what to do and how to do it. It will require transformative policies. Incremental change is no longer enough. The aim is to create not a political monolith, but a framework within which competing

mainstream parties agree about the challenges they face – and their need to persuade voters of their honesty, determination and ability to deliver real change.

The good news from our survey is that the right actions can break down today's tribal barriers and reverse the trend towards fragmentation and instability.

If the rewards for success are immense, so are the dangers of failure. The choice for each political leader is simply stated. Disruption is coming. Be its author – or its victim.

# 08

## Methodology

TBI commissioned Deltapoll to undertake a survey of voters' views in Australia (2,017), Canada (2,011), France (2,065), Germany (2,004), the United Kingdom (2,010) and the United States (2,003). Deltapoll interviewed representative samples online across these countries between 6 and 16 September 2024. The data have been weighted to be representative of the adult populations in each country as a whole by age, gender, administrative region and past election vote. Due to rounding of the polling data, data visualisations and figures may not add up to exactly 100 per cent. Don't know responses have been removed in some charts for analytical clarity.

Full data tables can be found [here](#).

Contributors: Tim Rhydderch, TBI, Jessica Lythgow, TBI

## 09

## Annex: Explaining the New Coalitions

There is growing demand from voters for change to the status quo. This demand for disruption has to be matched by new policy ideas. In this new politics, labels like “populist” or “mainstream”, or “left” and “right”, are increasingly losing their value for voters – and, in turn, for political analysis. We wanted to answer the question, “What are the new cleavages that are redefining the political landscape?” and explore where support for different political parties maps on to it.

We identified the five dimensions that best separate support for different political parties within countries. These included the familiar “left and right” and the now-familiar “open and closed” divisions, as well as three additional and statistically distinct dimensions around “belief in economic progress”, “institutional trust” and a “belief in opportunity”. For each of the political parties in the study we then calculated the mean voter position across these five dimensions.

Then, using a machine-learning method called “k-means” to cluster more than 20 political parties across six countries we polled, we were able to identify five groups of parties whose voters share the most in common with one another. While voters for a political party can be diverse in their views and beliefs, directly comparing the average voters across parties and countries is a helpful shortcut for identifying what unites and separates different voter groups.

Existing analyses have clustered voters within a country to identify “tribes” of voters. Building on this approach, for our multi-country poll, we have used a novel approach to cluster parties across those countries, based on their voters’ attitudes. These new labels for different coalitions are derived from the actual concerns and priorities of voters for different parties, moving beyond often pejorative or outdated labels that inhibit understanding. Our method allows us to:



- **Understand how party systems are changing:** By finding out what is really driving voters, we are able to understand where there is a mismatch between electoral supply (parties) and demand (their voters) across party systems.
- **Find out what unites and divides parties:** While sharing apparently very different ideologies, our analysis finds that our Insurgent Right (including, in the UK, for example, Reform voters) and Insurgent Left (such as the UK's Green Party) share much in common: they are the voters most likely to believe that economic progress is no longer possible. Finding these patterns reveals what is driving movement away from old political parties.
- **Identify opportunities to create new electoral coalitions:** In turn, this analysis is able to identify gaps in the political spectrum that could represent untapped voter demand. We can find what policy ideas unite voters and can bridge the divides in the new politics.
- **Compare between countries:** By doing a cluster analysis across six countries we can derive lessons for democratic countries around the world. And by clustering the *coalitions of parties* rather than individual voters, we are able to control for the vagaries of different electoral systems to find lessons, from other progressive parties or other insurgent threats to the centre ground.

## The Five Key Cleavages in Democratic Politics Today

### 1. The “Traditional Left-Right” Cleavage

The “traditional” way of understanding political systems still remains important today.

Survey elements used for analysis:

- Privatisation versus nationalisation.
- Government should hand out less money in benefits and reduce taxes, and vice versa.
- Government should tax and spend more or less.

### 2. The “Open-Closed” Value Cleavage

The “open-closed” dimension that helped explain recent nativism moments across many contexts continues to hold significant explanatory power in politics today.

Survey elements used for analysis:

- Believe traditional values have been lost and would prefer to go back, versus believe people have more freedom and would prefer not to go back.
- Would be happy, would not mind or would be unhappy if a family of a different race moved in next door.
- Believe immigrants are a burden versus strengthen the country.

### **3. The “Economic Progress” Cleavage**

A central, new division in modern politics around economic progress. Uniting voters for Mélenchon and the AfD is a belief that the essential generational bargain – that children today will have a better life than their parents – is broken.

Survey elements used for analysis:

- Belief you and your family will be better or worse off in the next few years.
- Belief children in your country will be better or worse off than their parents.

### **4. The “Institutional Trust” Cleavage**

The division between high and low trust in politics is a central cleavage in politics today: lower-trust voters are moving to insurgent parties from both the left and right. Among voters with the highest levels of trust are those voting for parties that would have long been thought of as at opposite ends of the political spectrum.

Survey elements used for analysis:

- Trust in establishment (for example judges and TV news).

- Belief key decisions are mostly taken by secretive elites or elected politicians.
- Trust in government to make the right decisions in the best interest of citizens.

### **5. A “Social Mobility / Hard Work Pays” Divide**

Separate and distinct from the expectation around economic progress is a belief in societal fairness and that by working hard you can get on in life.

Survey elements used for analysis:

- Belief that those who grow up poor but work and study hard can get to the top, or that poor families are much less likely to get to the top regardless of hard work.

# Endnotes

- 1 In France, respondents were asked which candidate they supported in the first round of the 2022 French presidential contest.

## Follow us

[facebook.com/instituteglobal](https://facebook.com/instituteglobal)

[x.com/instituteGC](https://x.com/instituteGC)

[instagram.com/institutegc](https://instagram.com/institutegc)

## General enquiries

[info@institute.global](mailto:info@institute.global)

Copyright © January 2025 by the Tony Blair Institute for Global Change

All rights reserved. Citation, reproduction and or translation of this publication, in whole or in part, for educational or other non-commercial purposes is authorised provided the source is fully acknowledged Tony Blair Institute, trading as Tony Blair Institute for Global Change, is a company limited by guarantee registered in England and Wales (registered company number: 10505963) whose registered office is One Bartholomew Close, London, EC1A 7BL.