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From protest to power?

Inside Reform UK's changing support base



More in Common

UK IN A CHANGING EUROPE

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About More in Common

More in Common is a think tank and research agency working to bridge the gap between policy makers and the public and helping people in Westminster to understand those voters who feel ignored or overlooked by those in power. Our British Seven segmentation provides a unique lens at understanding what the public think and why. We've published ground-breaking reports on a range of issues from climate and refugees to culture wars to crime. We are a full-service research agency offering polling and focus group research and are members of the British Polling Council.

About UK in a Changing Europe

UK in a Changing Europe is an academic think tank providing impartial, research-based analysis of the UK's relationship with the EU and the many issues that affect and are affected by it. We are hosted by King's College London.

Led by Professor Anand Menon and supported by an in-house team, UKICE works with academics across the UK and beyond to promote quality, timely and accessible social science research.

Contents

Foreword 3

Executive Summary 4

The Seven Segments 7

Introduction: Reform UK's Iceberg 9

Chapter 1 | Who are Reform's supporters? 11

Demographics and day-to-day life 12
Political background 16
Life satisfaction, social connection and threat perception 18
Opinions on key issues 22
- Immigration and multiculturalism 23
- Crime 25
- Economy and welfare 27
- Social issues 29
- Climate change 30
- Foreign policy, security and defence 31

Views on democracy 33
Reform in Wales 36
Reform in Scotland 41

Chapter 2 | Fault lines in Reform UK's support base. 44

The segments of Reform's changing voter coalition 45
Reform's new supporters 48
The non-voters engaged by Reform 53
The 'considerers' 54

Chapter 3 | What do Reform supporters make of Labour's first year? 58

Views on Labour's first year 58
The Winter Fuel Allowance 61
The electoral consequences for Labour 63
The legacy of the Conservative Party 64

Chapter 4 | Looking forward 67

For Labour 67
For the Conservatives 74
For Reform 79

Foreword

British politics is at a moment of profound change- a sentence we've heard repeatedly over the last decade, but which continues to ring true. Voter loyalties continue to shift, putting traditional parties under pressure as new forces emerge to challenge the status quo- not least, Reform UK.

UK in a Changing Europe first spoke with More in Common about working together on a report about Reform UK in May 2024, over what we thought would be a quiet summer in the run up to a general election. Instead, just a few weeks later, Nigel Farage was celebrating Reform UK's victories in five constituencies, as the party secured the third highest share of the vote of any party. Reform has steadily grown in popularity over the last year and topped More in Common's vote intention polling since May.

This report makes clear, however, that Reform's potential support could be even broader. The scale of opportunity for the party is clear - provided it can expand its support while keeping the diverse coalition it has built since July 2024 from fracturing. Reform's ability to do this is not only fundamental to its own success, but the future prospects of Labour and the Conservatives.

Reform's supporters are united by frustration with 'the system', but they are far from a single bloc. While its core supporters are radical and impatient for transformative change, newer supporters - especially those who have shifted to it from Labour - are more moderate and concerned with issues like crime, the NHS, and particularly the cost of living.

This distinction matters. Labour has undoubtedly lost ground to Reform, but many have defected out of disappointment rather than ideology. Pivoting to the right and chasing voters who have already disavowed the party could risk Labour overlooking these more moderate Reform supporters, who it could realistically win back. Misreading this audience risks ceding further ground, particularly in Wales, where Reform is leading in both Westminster and Senedd polls ahead of elections next year.

Meanwhile, the real opportunity among Reform supporters lies with the Conservatives. Only three in ten of Reform supporters rule out backing the Tories again, and many have shifted away from the party primarily for tactical reasons, seeing Reform as the strongest challenge to Labour. These voters could return if the Conservatives restore their credibility on immigration and the economy, and appeal to their 'small-c Conservative' instincts- appealing to voters' doubts about Farage on Ukraine and Trump, and Reform's lack of experience.

This report maps the complexity of Reform UK's support and identifies the levers that could determine the party's trajectory. For Labour and other parties alike, understanding these voters, and the concerns driving their shift, is essential to navigating the next four years.

I hope you find what follows useful and informative. Should you have any comments or questions, please do not hesitate to get in touch.

Anand Menon
Director, UK in a Changing Europe

Executive Summary

Reform UK's current potential ceiling is 42 per cent of the vote.

Reform UK is currently polling at around 30 per cent having steadily increased its vote share since the 2024 election. However this is not the party's upper ceiling - if the party is able to broaden its support base, it could attract the support of around 42 per cent of British voters. This includes voters who currently support it, voted for the party in 2024, or would consider voting for it if an election were held tomorrow. Including those voters who have a positive view of Nigel Farage, this ceiling increases to 49 per cent.

While the next election will probably be in three or four years' time and voting patterns will likely change significantly before then, a decisive Reform UK victory is potentially conceivable. However this would require them to appeal to a far broader coalition of voters.

Reform supporters are unique in their views on migration, but align with median public opinion on the economy and many social issues.

It is misleading to characterise Reform UK supporters as 'more extreme Tories': those intending to vote Reform are particularly critical of immigration and its cultural consequences, and broadly aligned with Conservative supporters on social issues. However, on economic issues like wealth redistribution and nationalisation, they skew further to the left, often aligning with the median of public opinion.

Reform's rise reflects a disillusionment with our politics, and some Reform supporters are ready to give up on the system altogether.

Reform supporters are united and defined by a strong sense that British politics is broken, and by a deep mistrust of politicians from every party. Three quarters are dissatisfied with the state of democracy in Britain, and 59 per cent believe the UK is not a genuine democracy at all.

Within Reform's voter base, there is a divide over how deep these problems run and how radical the solutions should be. While most feel let down by mainstream politicians and see Reform as a healthy challenge to the status quo, a significant minority believe our democracy itself is inherently broken, and are more willing to back radical, untested solutions.

Reform's voter coalition is becoming broader and less cohesive.

As Reform's voter base broadens, it is becoming less cohesive, and potentially harder to keep together as it splinters on key issues like the economy and the environment. The party's new supporters are less male, less online and, in many ways, less radical than their 2024 voters.

Breaking the party's supporters down using More in Common's segmentation, it is clear that the party's supporters are also increasingly divided in their views on how 'radical' the change the country needs is: Reform's core base of Dissenting Disruptors want to see fast, transformative solutions and have a higher tolerance for risk and chaos; meanwhile Rooted Patriots and Traditional Conservatives - who are forming the 'growth' part of Reform's coalition - value stability and may want to see further professionalisation from Reform in

order to actually vote for them. Attacks on the credibility of Reform's pledges or fiscal policies may undermine their support for the party.

These divisions widened across the 'source parties' of Reform's new supporters. Those who have switched from Labour to Reform differ significantly from those who have switched from the Conservatives. The two things that unite this coalition are concern about immigration, and a broader sense that the country is going in the wrong direction. Beyond that, any party hoping to win back these defectors must avoid treating Reform's voters as homogenous.

Reform 'considerers' diverge sharply from their core voters.

Of those who are likely to vote, and do not currently support Reform UK, roughly one-in-five (18 per cent) would be open to voting Reform. These 'considerers' are ideologically diverse, and their views on most issues (immigration being a key exception) are often closer to the median of public opinion than those of Reform's 2024 supporters. They firmly support net zero and are far more moderate on a range of social issues. Reform considerers are most likely to be deterred from backing the Party by Reform's lack of experience in government, and Nigel Farage's connection to President Trump.

These voters could be crucial to Reform's electoral prospects in coming years - and to the future of other parties.

Immigration remains the defining issue - but not the only topic of concern.

Immigration is the single biggest reason people support Reform, and those who voted for the party in 2024 overwhelmingly did so because of it. But as the voter base has expanded and become more diverse, the priorities of supporters have also broadened. The cost of living, the NHS and crime now sit alongside immigration as core issues for Reform supporters.

Demonstrating competence on immigration will be necessary for any party hoping to appeal to Reform's supporters, but it is not a silver bullet; voters want to see a wider policy offer and credible delivery on a range of issues.

Additionally, for all parties there is a risk of 'going too far' on migration: more than a quarter of Britons (and nearly half of Labour supporters) believe that Reform UK's policies on immigration are too strict. While most voters want greater control over migration, they also want to see compassion; many Britons will recoil from policies they see as putting those in genuine need at risk of torture and persecution.

Both main parties have lost voters to Reform, but some are still winnable.

Some Reform supporters could be won back by Labour. Those who voted Labour in 2024 but now support Reform are less negative in their views of Keir Starmer, more moderate on immigration, and more open to returning to Labour. Many have been driven to Reform more by disappointment than ideology. Labour could win these voters back with clearer delivery on the cost of living, channel crossings and NHS waiting times. Retreating on climate action, or taking a tougher stance on benefits, would be unlikely to appeal to the voters who are reachable for Labour.

Those who have switched to Reform from the Conservatives are even more likely to consider returning to them. Many Conservative to Reform switchers have done so tactically, backing what they see as the best challenge to Labour. In order to rebuild trust with these voters, the Conservatives would need to pass a viability test on immigration and economic management.

In both cases, voters are turning to Reform because they have lost faith in the main parties' ability to deliver for the country. Attacks on Reform UK's policies or competence will only land if other parties are offering a credible alternative.

2026 could see Reform become the largest party in the Welsh Senedd, and play a role in reshaping politics in Scotland.

With the party now leading in Wales in both Westminster and Senedd polling, Reform UK has the potential to upended the political landscape of Wales, bringing an end to Labour's dominance in one of its historic heartlands and, for the first time in the history of the Senedd, possibly opening the door to a First Minister from outside the Labour Party.

While Reform is unlikely to win seats in Scotland on the same scale as in Wales or England, it's possible that they could help to determine the outcome of the 2026 Holyrood Election - potentially preventing the formation of a stable Government.

The Seven Segments

Using extensive research into Britons' core beliefs, their values and behaviours, More in Common has developed a unique segmentation of the British public. This segmentation allows us to look upstream not just at what different groups think, but why they think it, reflecting fundamental differences between groups in how they relate to authority, change, community and the future.

More in Common's analysis produces seven segments within the British population, which are referred to throughout this report:

Progressive Activists - 12 per cent of the population; 2 per cent of Reform UK's current support base
A highly engaged and globally-minded group driven by concerns about social justice. Politically active, but feeling increasingly alienated from mainstream party politics, they prioritise issues such as climate change and international affairs. Occasionally outliers on social issues, they maintain a strongly held and sometimes uncompromising approach to their beliefs.

Incrementalist Left - 21 per cent of the population; 7 per cent of Reform UK's current support base
A civic-minded, community-oriented group holding views which are generally left-of-centre but with an aversion to the extreme; they prefer gradual reform over revolutionary change. They trust experts and institutions yet are largely tuned out of day-to-day politics and can be conflict-averse, stepping away from issues they see as particularly fraught or Complex.

Established Liberals - 9 per cent of the population; 4 per cent of Reform UK's current support base
A prosperous, confident segment who believe the system broadly works as it is and who trust experts to deliver continued progress. They have a strong belief in individual agency which can make them less empathetic to those who are struggling. Institutionally trusting, they maintain faith in democratic processes and have a strong information-centric way of engaging with issues.

Sceptical Scrollers - 10 per cent of the population; 6 per cent of Reform UK's current support base
A digitally-native group whose unhappiness with the social contract means they have lost faith in traditional institutions and seek alternative sources of truth online. Often shaped by their experience of the Covid pandemic, they prefer individual influencers over mainstream media and are increasingly drawn to conspiratorial thinking.

Rooted Patriots - 20 per cent of the population; 25 per cent of Reform UK's current support base
A patriotic but politically untethered group which feels abandoned and overlooked by political elites and yearns for leaders with common sense, but does not want to overthrow the system as a whole. They are particularly concerned about community decline and the pressures of migration. Interventionist on economics but conservative on social issues, they have shaped much of Britain's politics over the past decade.

Traditional Conservatives - 8 per cent of the population; 17 per cent of Reform UK's current support base

Respectful of authority and tradition, this group believes in individual responsibility and established norms that have served them well. Nostalgic for the past but optimistic about the future, they are deeply sceptical of many forces of change such as immigration or the path to net-zero.

Dissenting Disruptors - 20 per cent of the population; 39 per cent of Reform UK's current support base

Frustrated with their circumstances and with an appetite for radical solutions, this group craves dramatic change and strong leadership. Highly distrustful of institutions, opposed to multiculturalism and feeling disconnected from society, they are drawn to political movements that promise to overhaul the status quo and put people like them first.

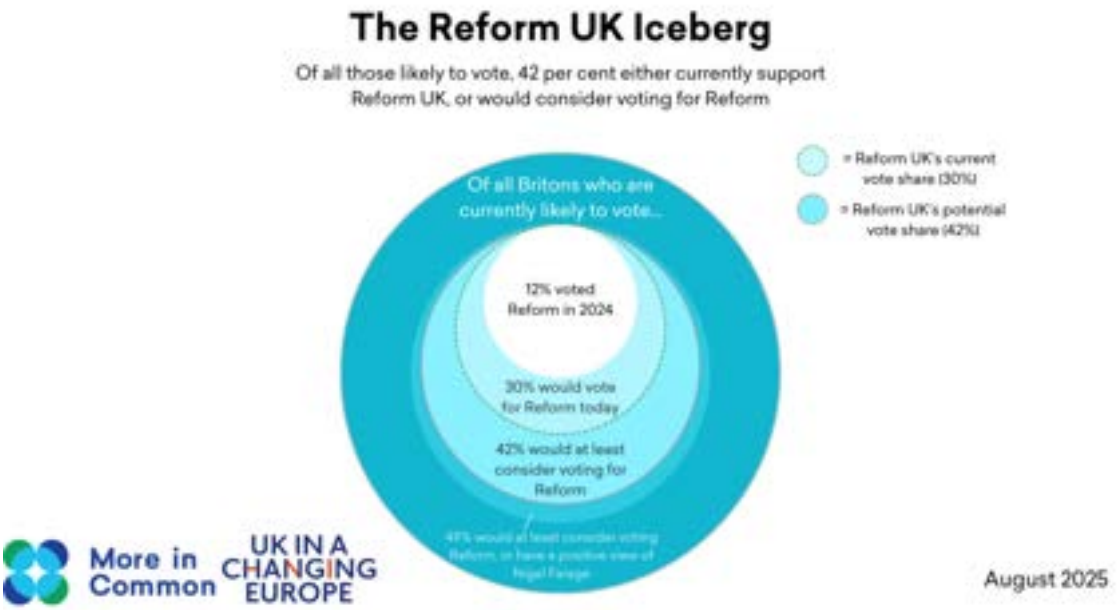
Introduction: Reform UK's Iceberg

The 2024 General Election was a breakthrough moment for Reform UK. Four million Britons voted for the party, exceeding the General Election vote share UKIP secured at its peak and delivering Nigel Farage his first seat in Parliament - along with four other Reform MPs.

Yet it now seems like their result in the General Election was the tip of the iceberg. By the summer of 2025, Reform UK's support in voting intention polls had risen to 30 per cent. The party enjoys an average lead of 10 points over Labour. Reform has shown itself able to attract segments of the electorate that neither the Brexit Party nor UKIP were able to reach. Of those currently intending to vote for Reform UK, just 11 per cent voted for UKIP in 2015, and eight per cent for the Brexit Party in 2019. What's more, Reform has shown that its appeal is not limited to England: it commands significant support in Scotland ahead of next year's Holyrood elections, and may top the polls in the Senedd elections, where Reform support in former Labour bastions such as the Welsh Valleys is driving their poll leads.

More widely, Reform's performance in the 2025 local elections and the Runcorn and Helsby by-election proved its ability to convert support into votes, and votes into seats, albeit in a non-national election with much lower turnout.

Yet Reform's ceiling could be higher still. Currently, 42 per cent of voters may be within Reform's reach. This includes those who currently support Reform UK, voted for the party in 2024, or would consider voting for it if an election were held tomorrow. If we include all voters who hold a positive view of Nigel Farage, this ceiling rises to 49 per cent.



If Reform UK is to reach these voters, it will need to develop a pitch that appeals to a changing and increasingly diverse coalition, to energise people who have never voted

before and address concerns about the credibility of a Reform Government. Understanding the values, priorities, and misgivings of its new support base, while continuing to please its loyalists, will be crucial.

There are lessons here for the other parties, too. While Reform's supporters are increasingly diverse, they are united by a sense that Labour and the Conservatives have failed to deliver change, and some are close to giving up on the system altogether. Reform's rise reflects a broader erosion of faith in political institutions, and a mood of malaise that leaves many voters willing to 'roll the dice.' The mainstream parties will only rebuild support if they can prove that existing institutions are capable of delivering.

To win back Reform's supporters, they must also avoid treating them as a homogenous bloc, understand the different factors drawing people to the party, and develop strategies that target those who are open to returning. If mainstream politicians hope to stay afloat, they must pay closer attention to the iceberg on the horizon.

Chapter 1 - Who are Reform's supporters?

- Reform UK's support base has broadened since the 2024 General Election. Its voter base is now more gender-balanced and more geographically diverse. Reform supporters increasingly resemble the everyday average Briton in demographics, habits and everyday lifestyle.

- Reform's supporters come from a range of political backgrounds, but are more likely to have defected from the Conservatives than any other party. In contrast, only 16 per cent of Reform's current supporters have voted for the Brexit Party or UKIP in the past.

- The party's new voter base is united by a shared sense of political disillusionment and alienation. They are less satisfied with life than other voters, more likely to feel like strangers to those around them, and more distrustful of institutions from politicians to the media. They have high levels of concern about crime, cultural change, and *immigration* (the single biggest driver of Reform's support).

- Reform supporters are motivated by fairness and have a strong aversion to those who they believe 'cheat' the system. The result is a distinctive mix of more typically 'left' and 'right-wing' economic views. While they believe taxes are too high and the benefits system is too easy to cheat, there is also support for nationalisation of utilities and some redistributive policies.

- Reform supporters are the voter group most sceptical of Net Zero, yet few are climate denialists; their opposition is born out of concerns about cost and fairness in the energy transition. They are cautious about Britain's global role, sympathetic about Ukraine but divided on how far Britain should be involved in the conflict. Reform supporters overwhelmingly believe that crime is out of control, and Nigel Farage's claim that Britain is 'lawless' reflects how most see the state of the UK.

- Within Reform's voter base, there is a divide over how deep these problems run and how radical the solutions should be. While most feel let down by mainstream politicians and see Reform as a healthy challenge to the status quo, a significant minority believe our democracy itself is inherently broken, and are more willing to back radical, untested solutions.

What do Reform UK's supporters look like?

Although Reform voters still have some distinct demographic markers, the party's base is becoming more diverse, more gender-balanced, and more geographically distributed. In other words, the party's appeal is widening and its supporters are becoming harder to define. Reform supporters now resemble the 'everyday' Briton in their lifestyle, media habits

and even in some political viewpoints. This shift suggests Reform is far from a niche fringe party, and instead the choice of voters from all walks of political life.

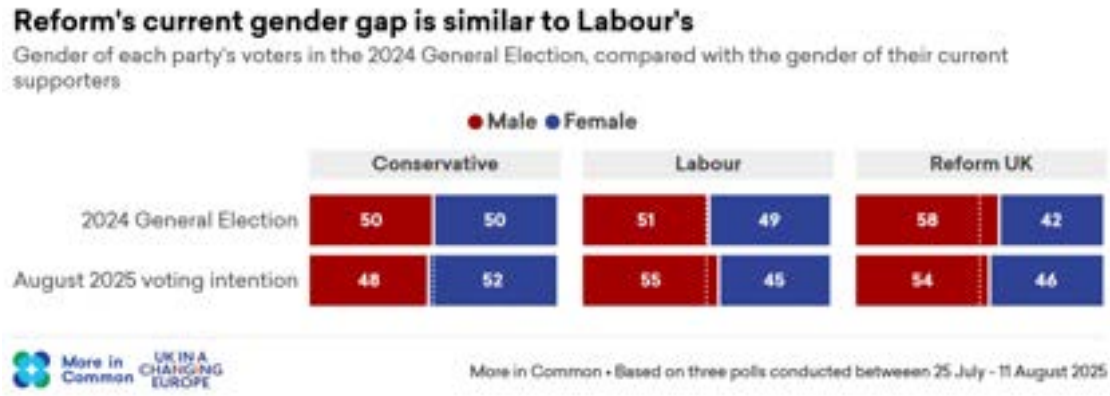
What binds these voters together is a deep wariness of the world around them and a strong sense of political disillusionment. Reform voters see the world as dangerous and fast changing, resulting in a mix of populist economic views - such as support for lower taxes alongside support for nationalisation of rail and water - and socially conservative views on issues like immigration, crime and trans rights.

Demographics and day-to-day life

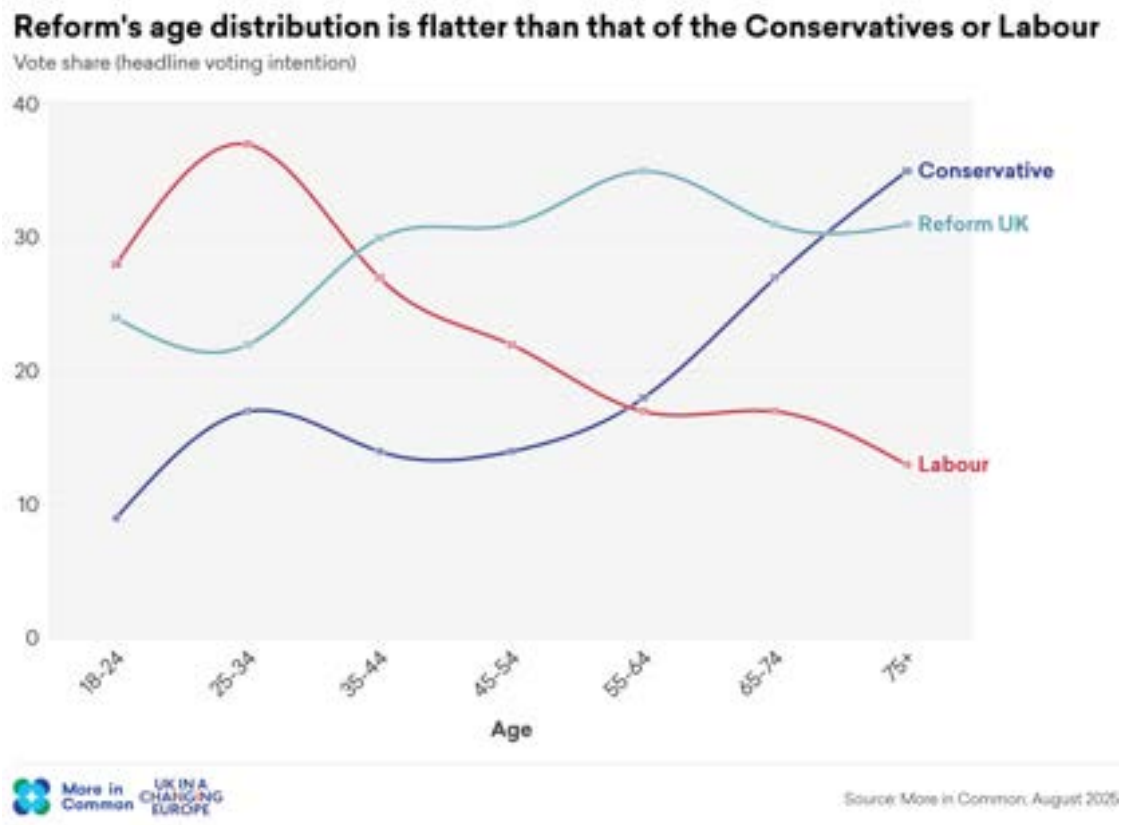
Those who currently say they would vote for Reform UK tend to be white (94 per cent, compared to 85 per cent of the public), male (54 per cent), heterosexual (95 per cent, compared to 91 per cent of the public), and over forty years (79 per cent, compared to 69 per cent of the public).

The public is more likely to say they see Reform UK as a men's or a 'blokey' party than any other. Yet, while Reform supporters remain more likely to be men than women (54 per cent to 46 per cent), this gender gap has narrowed over the past 12 months.

At the 2024 General Election around 1.4 men voted Reform for every woman; this has now reduced to roughly 1.2. Reform now has a marginally more female supporter base than Labour.



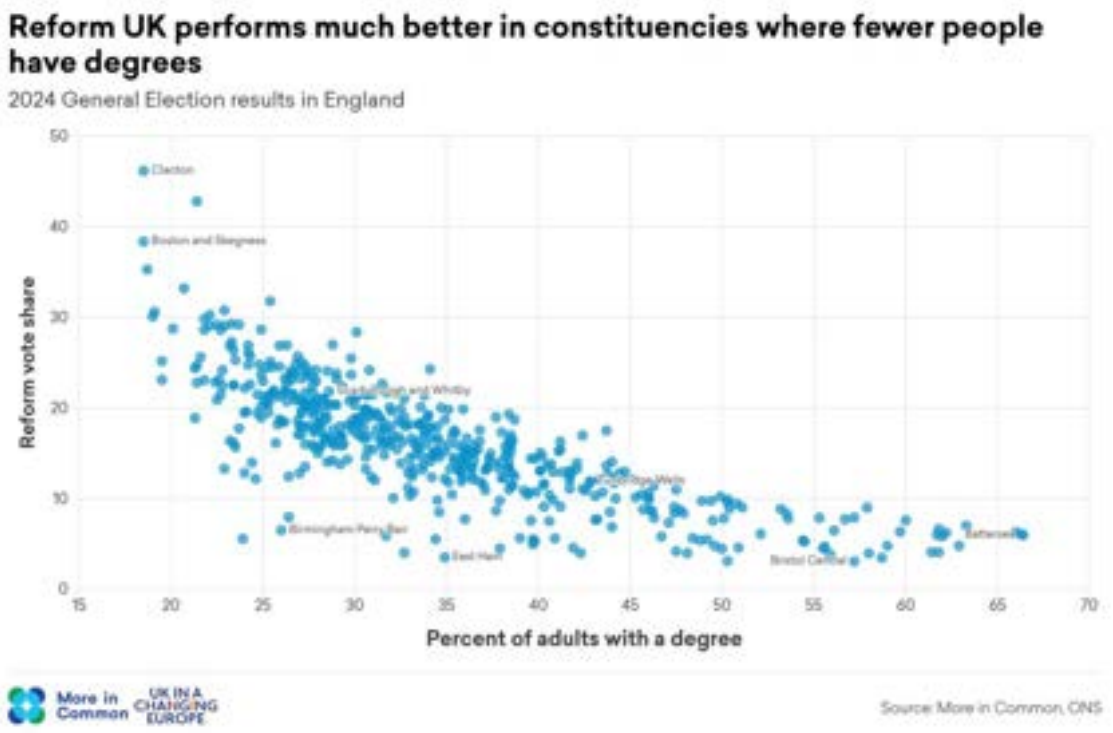
Reform voters skew older: the party's support is highest among Gen X and Baby Boomers. However, they have a more even age distribution than Labour or the Conservatives: the Conservatives command less than 10 per cent of the vote among 18-24 year olds, while Labour's support drops below 15 per cent among those above retirement age. In contrast, Reform's vote share remains above 20 per cent among every age group.



Most of those intending to vote for Reform UK live in suburbs or small towns, a similar geographic pattern to Conservative supporters. Around two-thirds own their own home, the same proportion as Liberal Democrat supporters, but lower than the proportion of Conservatives.

Over half of Reform UK's voter base is currently in work (40 per cent full time, 14 per cent part-time), greater than the equivalent numbers among Conservative or Liberal Democrat supporters, but not as high as Labour supporters. A third of Reform supporters (33 per cent) are retired, one of the highest proportions of pensioners of any party, second only to the Conservatives.

One area in which Reform supporters stand out is on university attendance: they are the least likely of any voter group to have a degree - more than four in five of those who say they would vote for the party are non-graduates. They are, however, more likely than supporters of any other party to hold a vocational or technical qualification.



A similar number of those currently intending to vote for Reform are on benefits - such as universal credit - as Labour, Liberal Democrat and Green supporters. However, those planning to vote for Reform are 17 points more likely than Labour supporters to have a household income below £40,000.

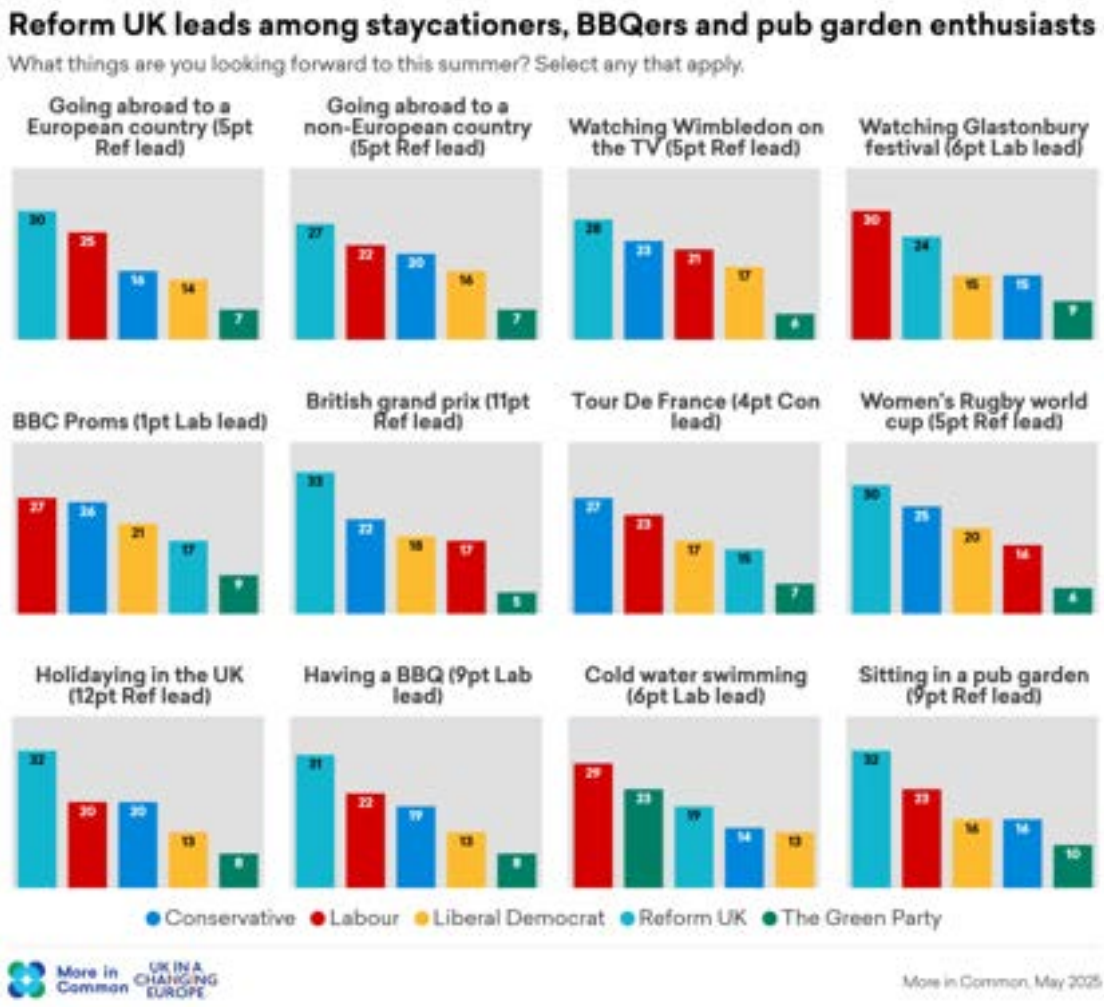
While Green Party supporters are more likely than Reform UK supporters to have an income below £10,000 (in part due to their younger support base), supporters of both parties are similarly likely to describe themselves as financially struggling. Just 36 per cent of Reform supporters describe themselves as financially comfortable - compared to 52 per cent of Labour voters and 41 per cent of the overall British public. 26 per cent of Reform supporters say they often struggle to make ends meet, or sometimes have to go without essentials such as food or heating.

Overall, Reform UK's support base has clear demographic markers. However, its growing appeal has made its supporters more heterogeneous. In some ways, it could be said to now be Britain's most mainstream party.

Looking at less traditional markers beyond demographics - such as day-to-day life and preferred pastimes - Reform supporters look strikingly 'normal', by some measures even more so than Labour or Conservative supporters.

When asked what they were most looking forward to this summer, supporters of the two main parties are far more likely to have niche interests - the Conservatives lead among Tour de France fans, while Labour leads among Glastonbury goers and cold water swimmers - mirroring the age and class profiles of those groups. Reform, by contrast, leads

among those who looked forward to Britain's most popular summer activities: holidaying in the UK or Europe, having barbecues, and spending time in pub gardens or on the beach. They've also made inroads among surprising groups, leading among Wimbledon watchers and coming second to Labour among those excited about Glastonbury festival, reflecting an expansion of their demographic base.

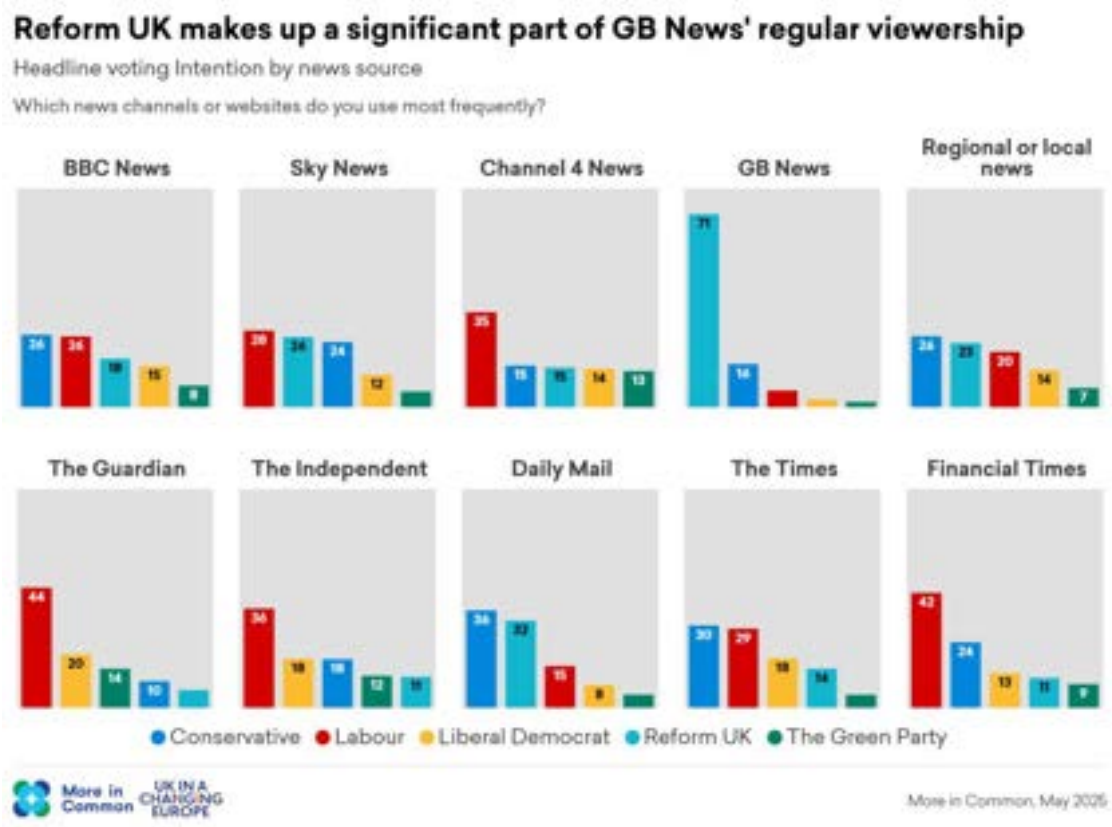


More broadly, Reform supporters tend to be representative of the wider public in their lifestyles and preferences, from their main supermarket of choice (Tesco) to their favourite type of trip (beach holidays).

Reform supporters' preferred forms of media consumption are also largely similar to that of the general public. Those who currently say they would vote for the party are similarly likely to frequently read print newspapers (roughly one in five), watch TV (90 per cent of Reform voters, compared to 85 per cent of the wider public) and use social media most days (70 to 74 per cent) as the public as a whole. They are just as likely to often use platforms such as X/Twitter, YouTube and WhatsApp, though they are less likely to use Instagram and LinkedIn.

One area where those intending to vote Reform stand out is in their preferred channels of broadcast media. This group of voters is less likely to engage with the BBC and is much more likely to watch GB news: if the electorate were limited to frequent viewers of GB News, Reform UK would win with 71 per cent of the vote. They are also less likely to read papers like The Times, The Independent and particularly The Guardian, and more likely to read The Daily Mail.

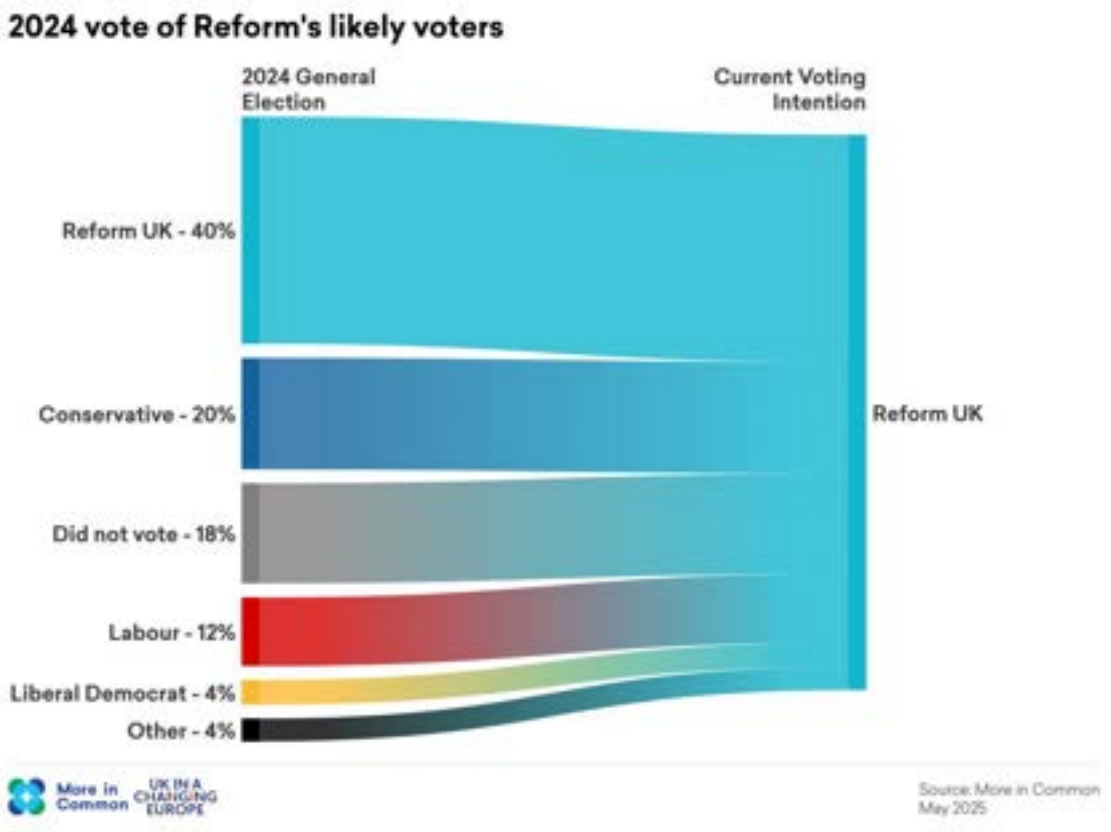
Behind this gap in media consumption is a general lack of trust in mainstream media sources: Reform supporters are the only voter group with negative net trust in the BBC. They are also less likely than other voter groups to trust other broadcasters like ITV, Sky News and Channel 5.



Political background

Only four in ten current Reform supporters voted for the party in 2024: the rest supported other parties, or did not vote at all. The largest portion (20 per cent) of Reform's new voters are 2024 Conservative voters, while 18 per cent did not vote in 2024, and 12 per cent voted for Labour at the last election.

Notably, few of Reform's current supporters have voted for Nigel Farage's parties in the past: only 16 per cent have voted for UKIP or the Brexit Party in previous elections.



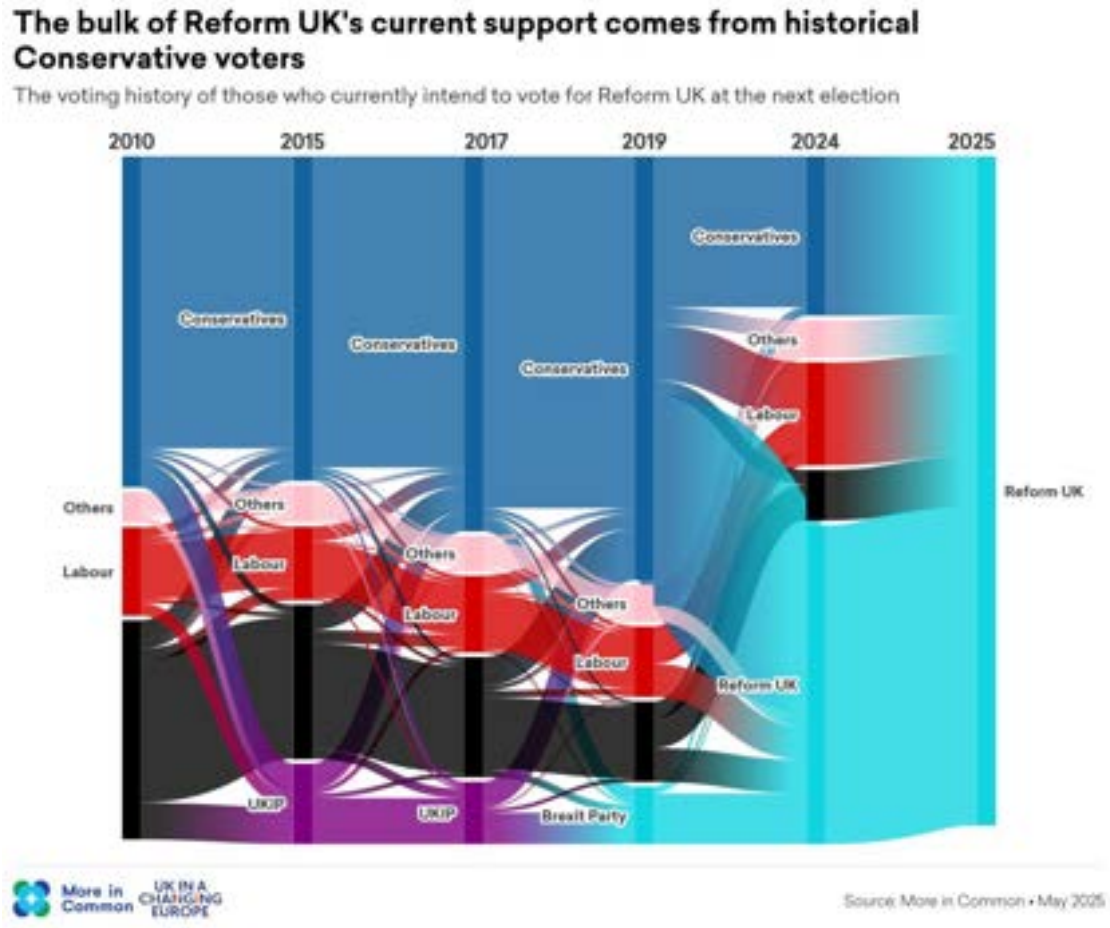
Reform's support base includes many previously long-term Conservative voters. Over half of those who would currently vote for Reform have voted Conservative at each election between 2010-2019. More than two in five Reform voters say they voted for David Cameron's Conservatives in the 2010 General Election, with just 11 per cent casting a ballot for Gordon Brown's Labour.

Nigel Farage's previous best electoral result came in 2015 when he led UKIP. At that election, 17 per cent of 2024 Reform voters supported Farage's UKIP, while 40 per cent remained loyal to Cameron's Conservatives. Meanwhile, the threat of a Corbyn premiership in 2017 and 2019, plus the agreement between the Brexit Party and the Conservatives at the latter election, drove up support behind the Conservatives among this group.

Reform has been uniquely successful at holding on to, and indeed building on, its 2024 vote. 88 per cent of 2024 Reform voters say that, if an election were called tomorrow, they would still vote for Farage and his party - the highest retention rate of any party. Just 4 per cent say they would vote for Kemi Badenoch's Conservatives, despite the high preponderance of former Conservative voters among this group.

But the shift in voter loyalty is not just limited to the Conservatives; every party is seeing some of its 2024 voter base shift to Reform. Seven per cent of 2024 Liberal Democrats say they would currently vote Reform, as would 13 per cent of Labour supporters. Yet the Conservatives remain the party that has seen the greatest losses to Reform; more than a quarter (26 per cent) of 2024 Tories would vote for Reform. What's more, as of the middle

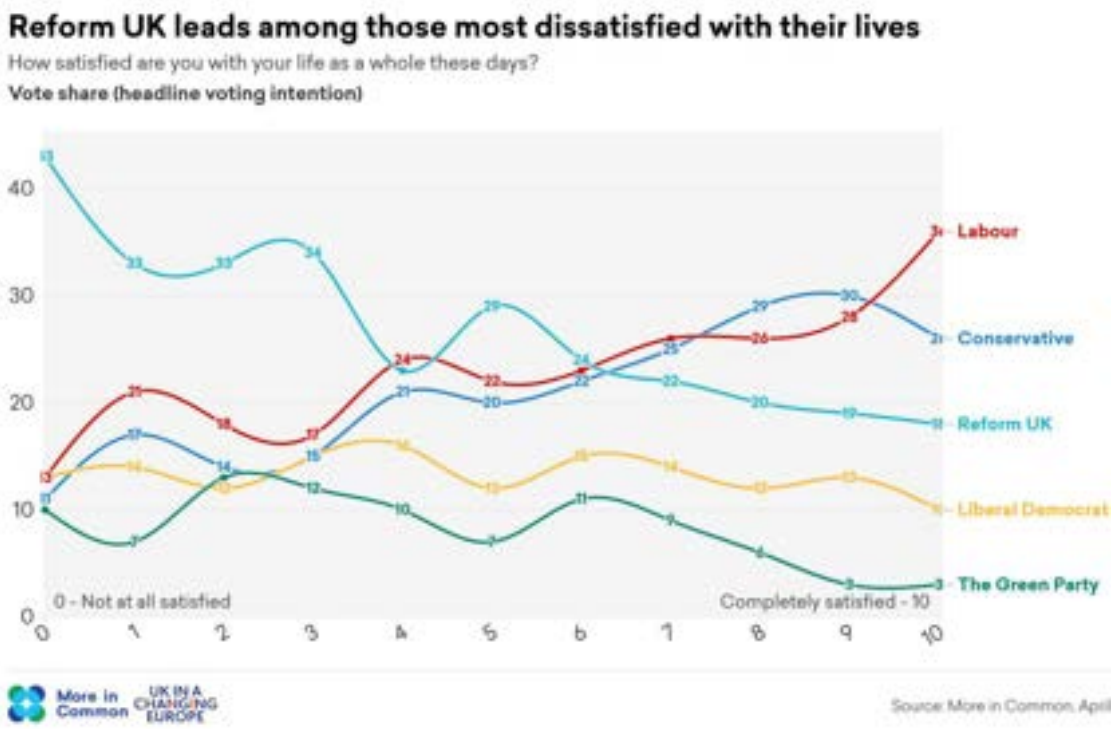
of 2025, those who voted Conservative in 2019 are now more likely to vote Reform than they are to vote Conservative if an election were held today.



Life satisfaction, social connection and threat perception

One of the most striking characteristics of Reform supporters is their lower level of life satisfaction. The party's vote share peaks among voters who rate their satisfaction as 0 out of 10, and falls steadily as satisfaction rises. Labour and Conservative support follows the reverse pattern, increasing with life satisfaction. Green Party supporters show a similar trend to Reform, but the gradient is much less steep.

Asked how often they felt various emotions over the past month, Reform supporters are less likely than any other voter group to say that they felt happy most or every day. They are the most likely to say that they feel angry most days and - alongside Green Party supporters - the least likely to feel respected.

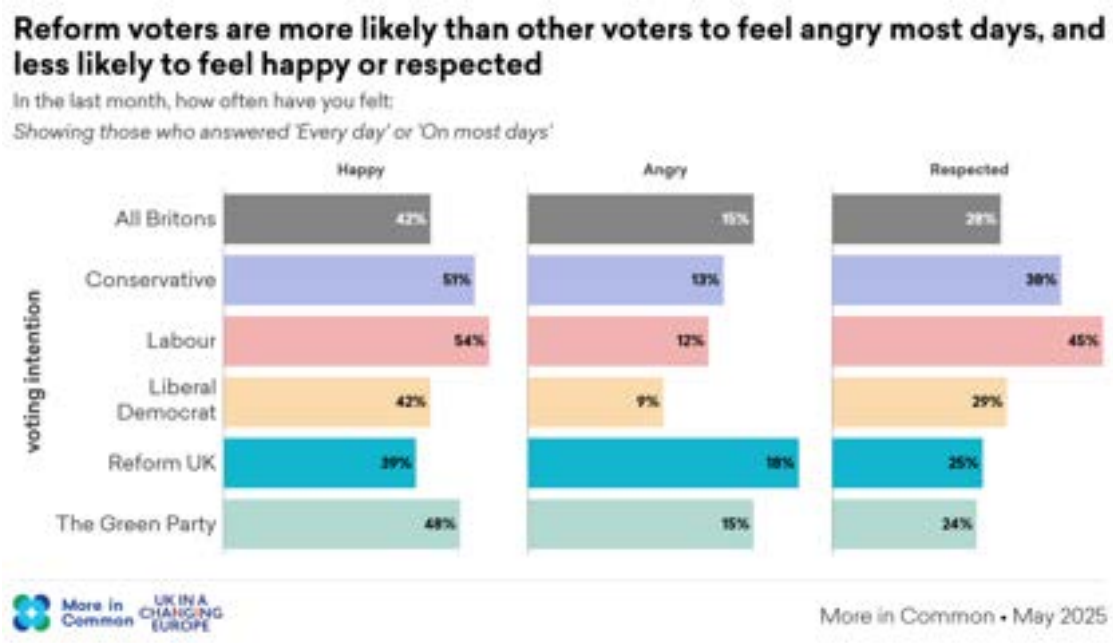


But this lower level of contentment and life satisfaction is not purely personal; it also reflects an erosion of faith in the social contract. Forty-one per cent of Reform voters and 45 per cent of Green voters expect to have a less comfortable life than their parents, compared to just 29 per cent of the general public. Both groups report lower satisfaction with their finances, family life, and social life.

In focus groups, Reform supporters explain how this sense of personal struggle feeds directly into political disillusionment. The cost of living crisis has reinforced their belief that hard work no longer guarantees a decent life. 47 per cent say that finances are the biggest source of stress in their life, more than every other voter group aside from Greens. Many describe working overtime yet still being unable to afford small luxuries such as a takeaway or a holiday, undermining the basic idea that effort is rewarded.

In fact, Reform UK's vote share is significantly higher, and Labour's lower, among those who say they can no longer afford the occasional takeaway, a trip to the cinema, or a yearly holiday. The idea that 'what you put in' isn't reflected in 'what you get out' is central to many Reform supporters' desire for radical economic change, explored further below.

> *Sometimes I'm cremating until 11 o'clock at night but I'm lucky if I get any sort of treat for myself fortnightly, maybe monthly. I can't afford a takeaway monthly, because after all my bills have come out and I've done my food shop, I've got nothing left. I've worked since I was 15. So yeah, I get mad and irate looking at people (on benefits) that are going abroad two and three times a year and I couldn't afford to go abroad once a year. I couldn't afford Skegness for a week if I tried.*
>
> **Kelly, Cremator Technician, Ashfield, Reform voter**



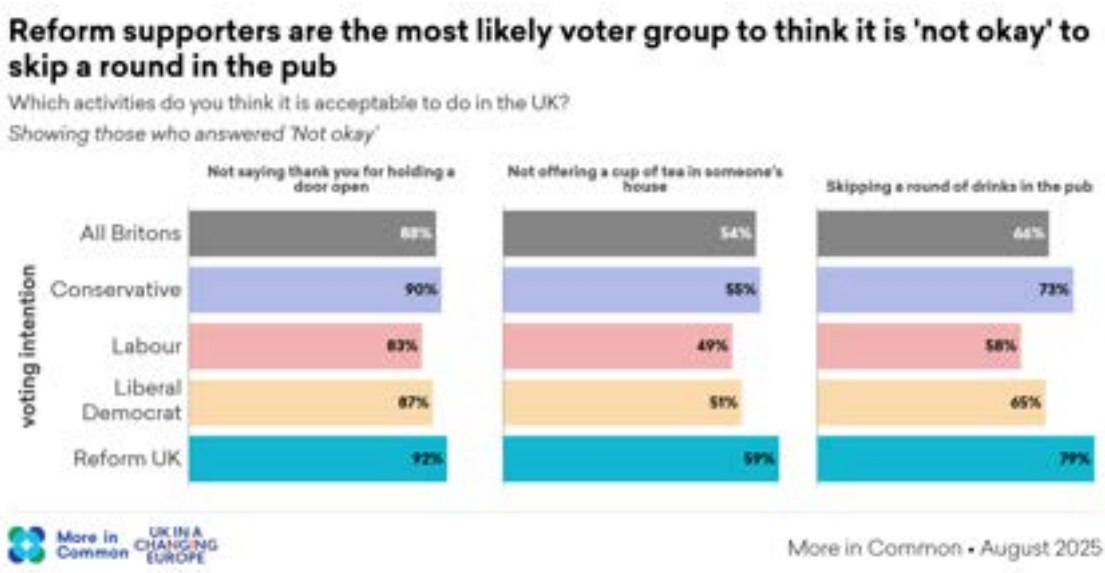
Lower life satisfaction among Reform voters is matched by a strong sense of social disconnection. Fifty-eight per cent feel disconnected from the society around them - more than any other group of party supporters, and eight points higher than the British average. But where Reform supporters particularly stand out is in their sense of cultural alienation: nearly three-quarters of this group say they sometimes feel like strangers in their own country, compared to 44 per cent of the wider public.

In focus groups, it's clear that Reform supporters have a strong belief in social norms around what they see as courtesy and decency, and many feel that these social bonds have eroded over time. Reform supporters are more likely than any other voter group to believe it is unacceptable to skip a round in the pub (79 per cent), board a train before passengers have finished alighting (91 per cent), or not offer someone a couple of tea when they visit your house (59 per cent).

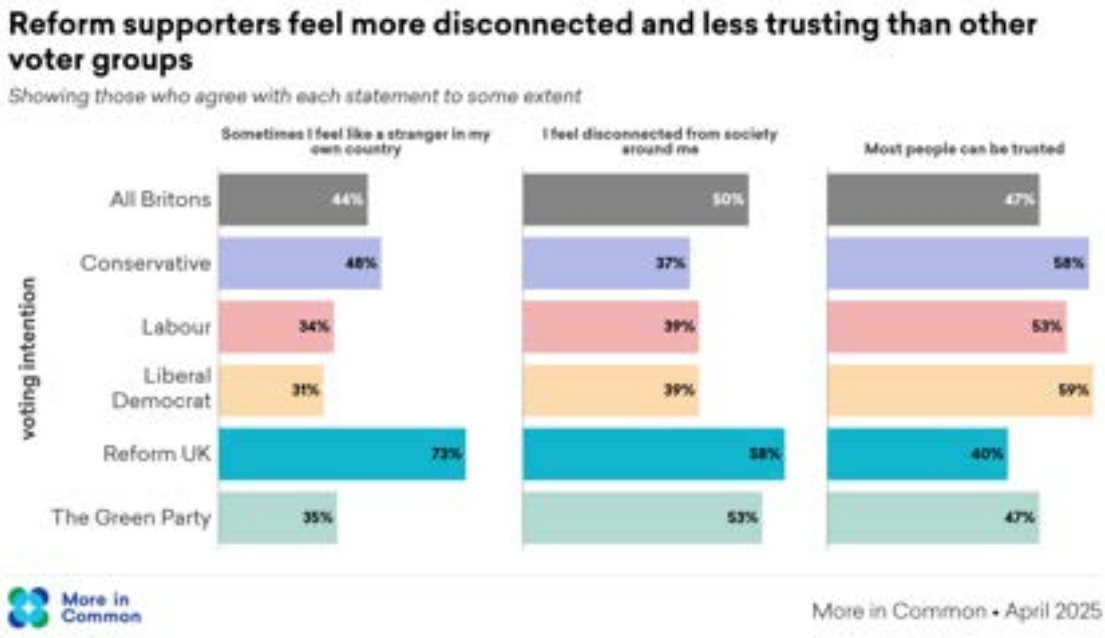
Asked about parenting styles, most Reform supporters believe that good manners, obedience and respect for elders are more important than curiosity, independence or self-reliance: they are more likely than any other voter group except for Conservative supporters to hold these views. Yet nearly nine in ten (88 per cent) believe that children's behaviour has got worse in the past 20 years.

> *"We're a generation where we've all worked, we've all been brought up respectfully and society has gone downhill in my view for lots of reasons. Whether it is money, whether it's immigrants, whether it's expectations, it's very hard to actually think. I can't think of something that has improved."*
>
> **Susan, retired, Bridgewater, Reform supporter**

> *"Very broadly, I think not enough people in society are willing to work together for the greater good.* ***I think we seem to have become quite fragmented, selfish in some cases*** *and the country just seems to be gradually… the general common decency in behaviour of people just seems to be in decline for possibly various reasons. A lot of that has to do with people struggling. I think things have got worse since Covid."*
>
> **Simon, teacher, Barnsley, Reform considerer**



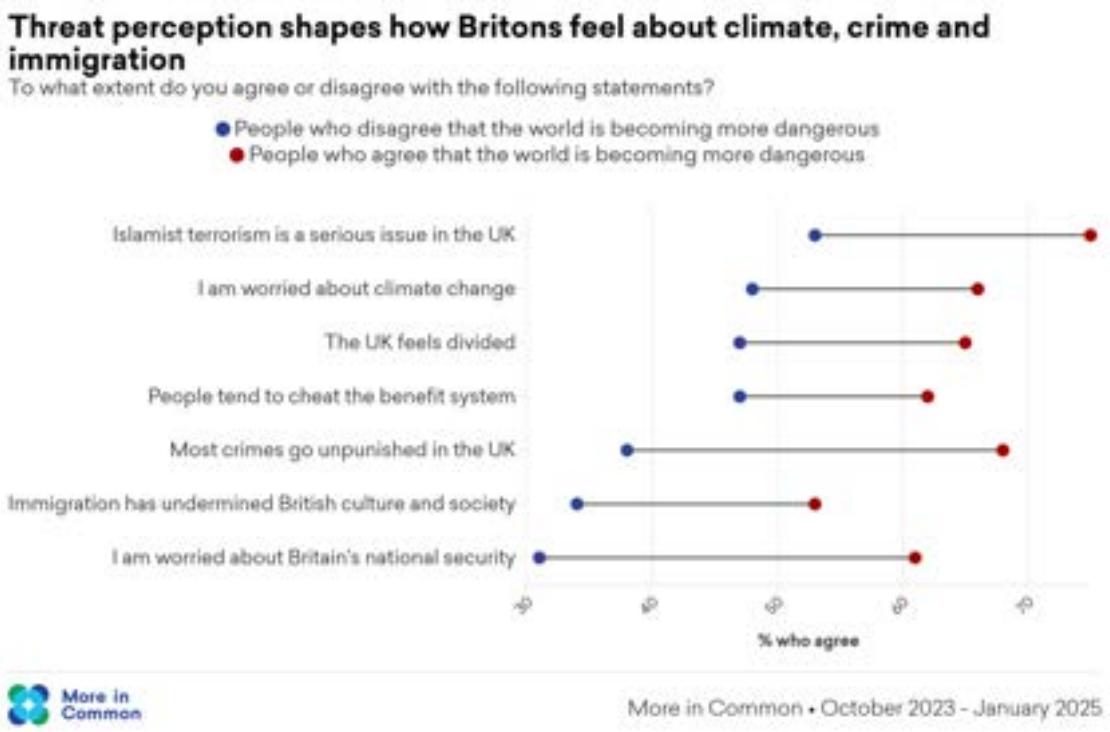
Reform supporters are also the least trusting of any voter group: 59 per cent believe you "can't be too careful" with people. This mistrust is most starkly directed toward institutions such as politicians, media, and big business, but also reflected in other social bonds: Reform and Green Party voters tie for having the lowest trust in their own neighbours.



Linked to this lack of trust is a high threat perception. 90 per cent of Reform supporters believe the world is becoming more dangerous, ten points higher than the GB average. They are also more likely than any other group (46 per cent versus 33 of Britons overall) to say their local area is becoming less safe.

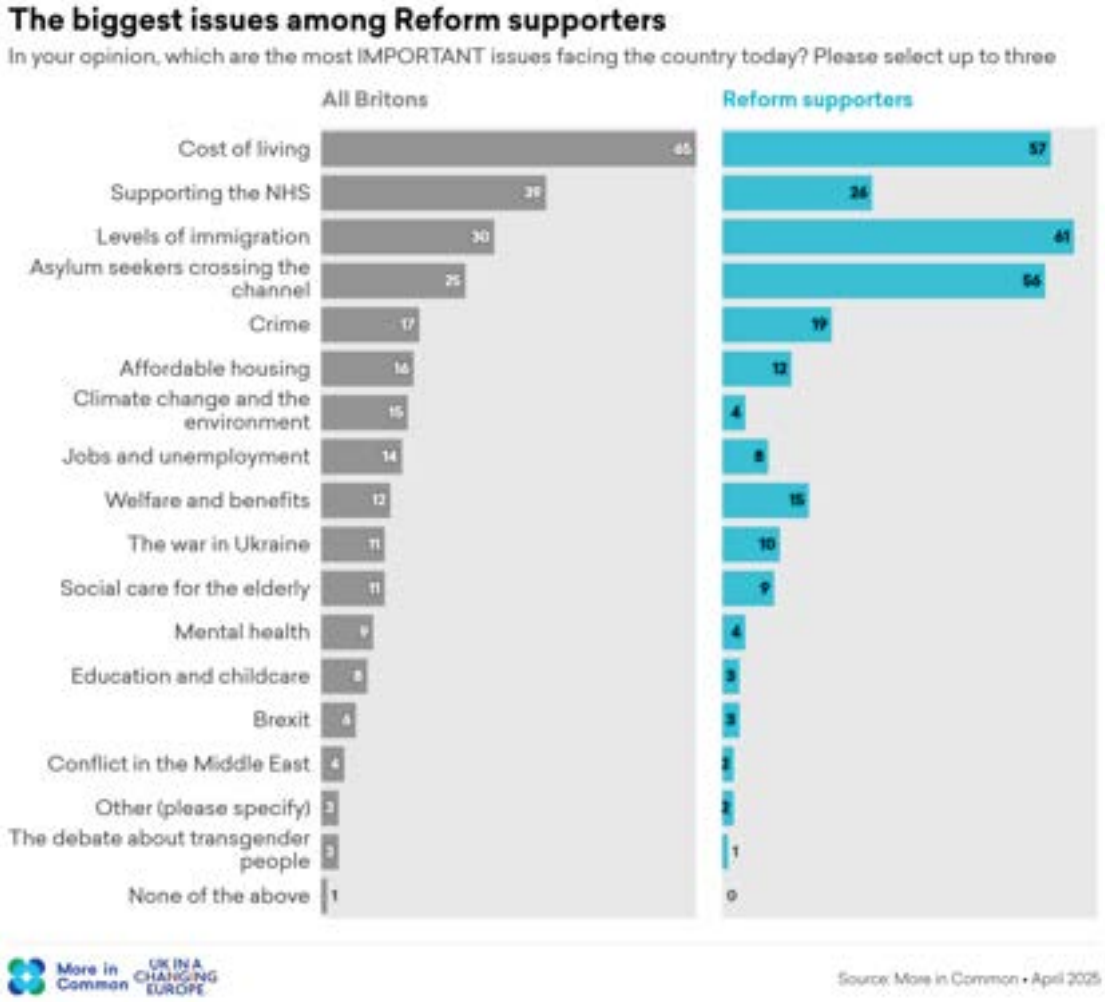
This shapes how Reform supporters perceive a range of issues, underpinning much of their political outlook. Threat perception is highly predictive of other viewpoints: Those who believe the world is growing more dangerous are significantly more likely to view immigration as a threat to British culture, to feel the UK is divided, and to worry about rising crime and social disorder.

> "I think the world is effed up and I feel sorry for the kids growing up in it."
>
> **Chelsea, social worker, Hull, Reform voter**



Opinions on key issues

Immigration and asylum, the cost of living, and the NHS rank as the top priorities for Reform UK supporters. While these match the main concerns of the public overall, a key difference is the level of concern around migration and asylum - 87 per cent of Reform supporters select either levels of immigration or channel crossings as among the most important issues facing the country, compared to 53 per cent of the public overall.



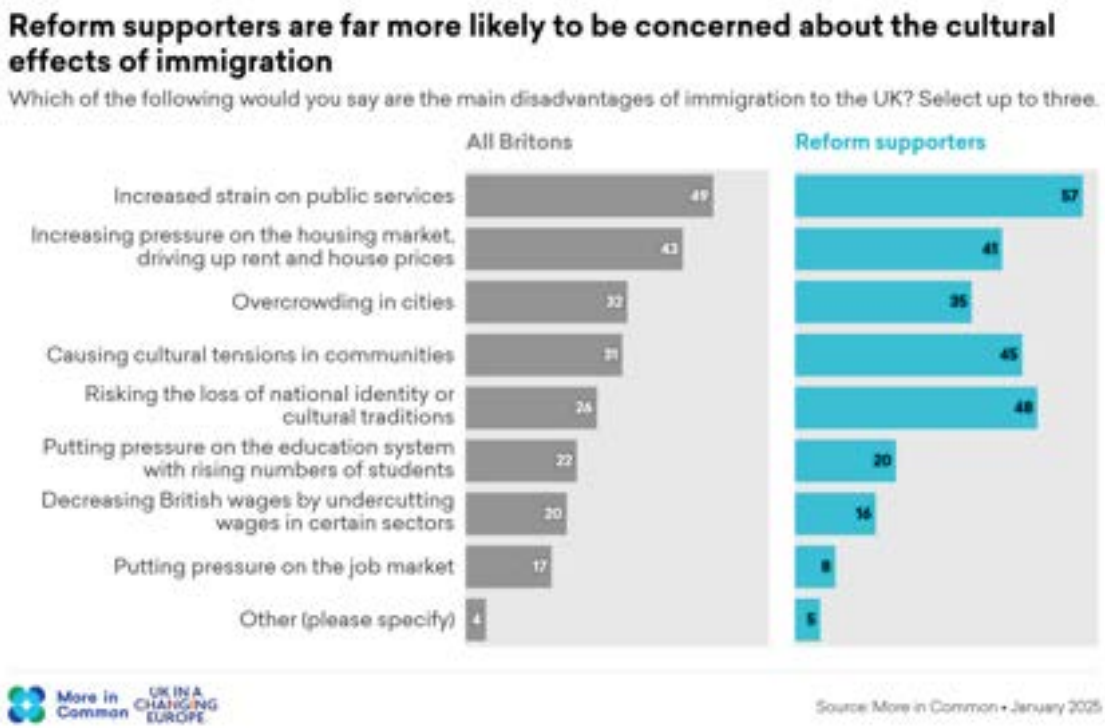
Immigration and multiculturalism

While pluralities of voters across the board want to see a level of reduction in immigration, Reform supporters show the strongest support for reducing net migration: 86 per cent believe the government should accept fewer immigrants annually, compared to 58 per cent of the general public. There is also strong support among Reform supporters for making the requirements for British citizenship more stringent: 96 per cent of Reform supporters lean toward the view that immigrants should be required to pass strict language and culture tests before they can become citizens, versus 81 per cent of the public overall.

Reform supporters also have stronger nativist leanings, and are more suspicious of multiculturalism than the public as a whole. People intending to vote for Reform are the most likely to believe that the government should put British people first (86 per cent versus 53 per cent on average), and the least likely to believe that British identity is strengthened by diversity (12 per cent compared to 43 per cent).

While the majority of Britons believe that current levels of net migration are too high, Reform supporters are distinct in their focus on migration's cultural impact. Nearly half (48 per cent) cite "risking the loss of national identity or cultural traditions" as one of immigration's greatest downsides - their second-highest concern. Among the general public, this ranks fifth, chosen by just 26 per cent. Integration is a key priority for Reform supporters; 90 per cent support revoking migrant's visas if they fail to integrate by learning English or finding work.

Reform supporters also tend to be far more negative than Conservative supporters about the impact of immigration on British society and culture. Only 13 per cent of Reform supporters view immigration as enriching the UK, compared to 34 per cent of Conservatives and 45 per cent of the public. Four in five believe multiculturalism poses a threat to British identity, versus 46 per cent of Britons on average.



Central to Reform supporters' concerns about immigration is a sense of lacking control, exemplified by small boats crossing the Channel. While all voter groups tend to overestimate the scale of illegal migration, Reform supporters do so the most: the average Reform supporter believes that half (49 per cent) of all those immigrating to Britain do so illegally by small boat.

> *"They're putting them up in hotels, et cetera. And I'm talking illegal immigrants as well, not just general immigration."*
> **Craig, warehouse worker, Basildon, Reform voter**

Reform supporters overwhelmingly believe Nigel Farage would have the best chance of reducing the number of small boat crossings to the UK compared to Kemi Badenoch or Keir Starmer. 88 per cent say Farage would be the most successful, with just four per cent opting for Kemi Badenoch or Keir Starmer respectively. While the wider public also believes Farage is best placed to do tackle crossings (40 per cent), they have slightly more faith in both Starmer (15 per cent) and Badenoch (8 per cent), while over a third say none of the three would be able to cut the number of crossings.

Taken together it remains the case immigration is the single biggest draw to the party. In focus groups, supporters and considerers frequently point to Reform's stance on immigration as their primary reason for supporting the party, even if they are sceptical or unsure about the rest of its platform. The challenge for Reform is demonstrating that its policy agenda is wider than simply immigration, to avoid being seen as a single-issue party, while issues such as the cost of living and NHS command significant public concern.

> *"I don't agree with everything that (Farage) says, but there's more that I do than I don't. And* ***he seems like he's going to do stuff on immigration*** *and all the stuff that we're really thinking about."*
> **Matthew, photographer, Dagenham, Reform considerer**

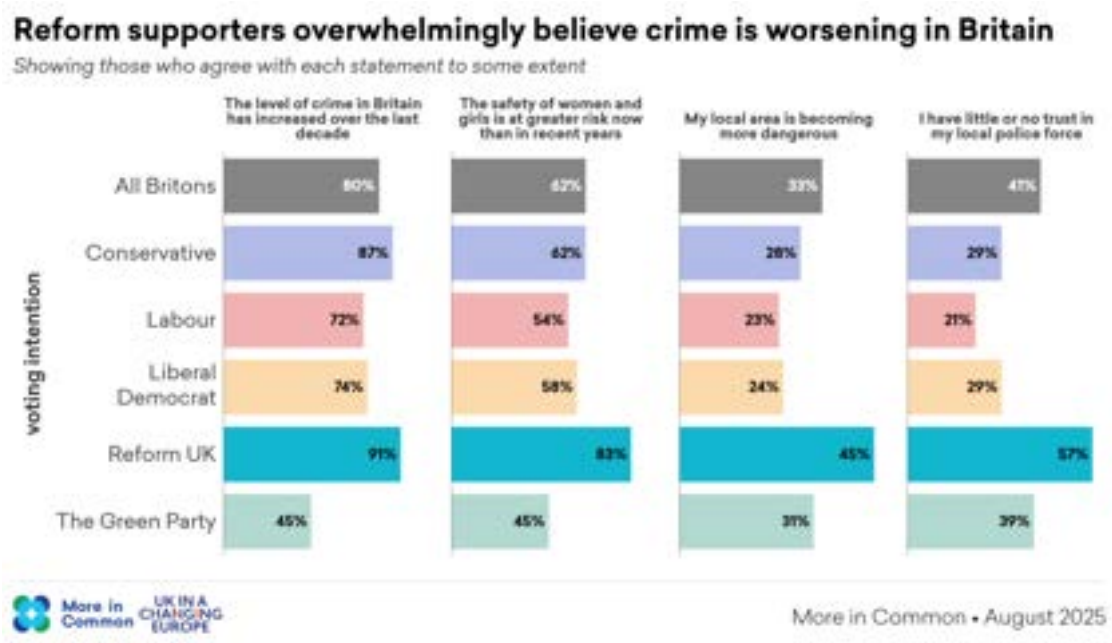
> *"I do kind of like him as a person, and obviously illegal immigration is a massive problem. But that's the main thing that you think of when you think of Nigel Farage, but it's like there's a lot more to running the country than just sorting that out.* ***But is it the shock that everybody would need if a different party got into power to shake things up and make real changes for decent hard-working people.****"*
> **Catherine, purchase ledger clerk, Scunthorpe, Reform supporter**

Crime

As discussed above, supporters of Reform UK are united by a sense that the country is becoming a more dangerous place. While this affects how they view most policies and issues, it perhaps most directly shapes their views on crime and justice. Nigel Farage's assertion that Britain has become 'lawless' reflects how the majority of his supporters feel about the country.

Most Reform supporters believe that crime is out of control nationally,, and are more likely than any other voters to think their local community is becoming more dangerous. They have little trust in the authorities to address this: unlike nearly six in ten Britons (59 per cent), only 43 per cent of Reform supporters say they have confidence in their local police force. Crime is a top issue for those who plan to vote Reform, usually ranking just below the cost of living, NHS and immigration.

Reform's recent focus on women's safety is one that aligns with the concerns of their voter base: 83 per cent of Reform supporters think that the safety of women and girls is at greater risk today than in recent years; this rises to 90 per cent among the party's female supporters.



Eighty-four per cent of Reform supporters believe that those who break the law should be given 'harsher or stiffer sentences' (compared to 68 per cent of the wider public) and they have higher support for the death penalty than any other voter group (74 per cent, compared to 54 per cent of the wider public).

However, much of their sense that Britain is lawless is not driven by serious crimes, but a perception that petty crimes go unpunished. Reform voters are more likely than the average Briton to say they have witnessed petty crimes like antisocial behaviour and shoplifting, although this gap disappears when looking at more serious crimes.

More than three quarters of Reform supporters (77 per cent) believe that crimes such as phonesnatching and anti-social behaviour are not taken seriously enough by the police, compared to 63 per cent of the general public.

For those who support Reform UK, crime is especially salient for two key reasons. First, it is seen as a visible symptom of Britain's failing institutions: petty offences appear to go unpunished, and the police are no longer trusted to keep communities safe. Second, many Reform voters view crime as evidence of a deeper social decline, often linking it in focus groups to fraying community ties and a lack of discipline among children. Indeed, nearly nine in ten (88 per cent) of Reform voters believe children's behaviour has worsened over the past two decades.

Crime and justice, then, play a central role in how Reform supporters assess the state of the country. Their concerns are rooted less in crime statistics than in a broader sense of social disorder. Tackling visible and petty crimes would be crucial to restoring these supporters' faith in the criminal justice system.

> *"My parents brought me up to have good manners, say please and thank you and have respect. It's not rocket science, but people seem to have trouble saying no to their children. So hence you get these generations who just think it's okay to do whatever the hell they like"*
> **Josie, writer, Banbury, Reform supporter**

> *"Parents don't bring their children up to respect anybody, or a lot of parents don't (...) some parents are marvellous, their children grow up, they're really respectful. They wouldn't dream of going and beating up old ladies. And some people just, they're so busy going to work to pay their mortgage, they don't have time for their children."*
> **Janet, farm secretary, Norfolk, Reform considerer**

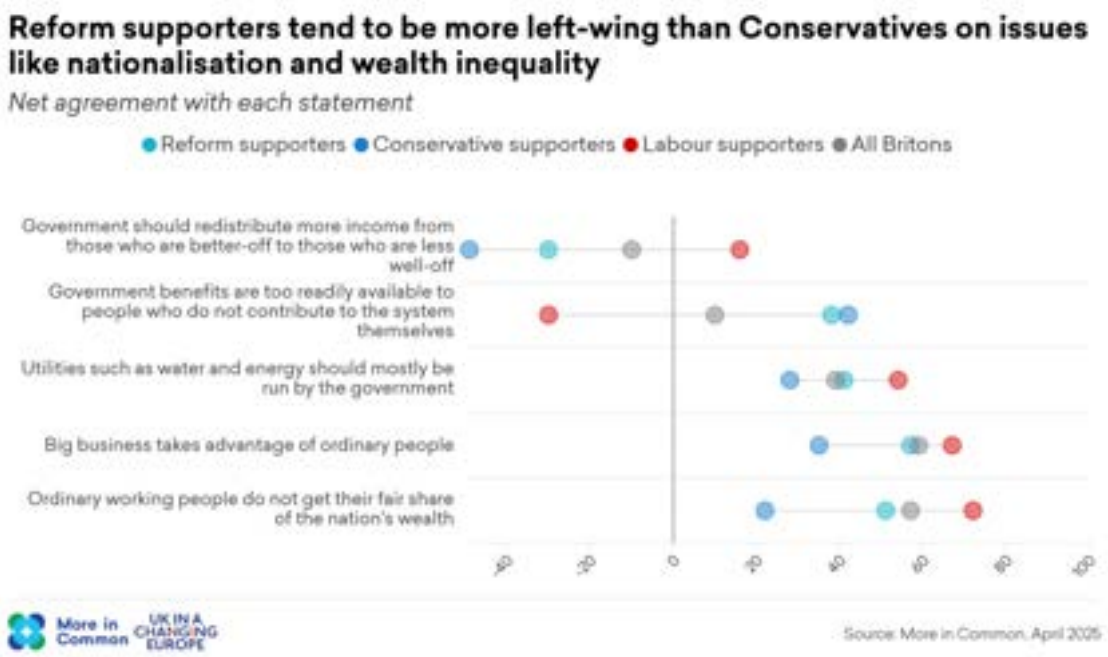
Economy and welfare

Reform supporters have distinctive economic views. As with the Conservatives, they strongly believe that taxes are too high, and many believe that benefits are too readily available for people who do not contribute to the system. However, on issues of state intervention - such as nationalisation - they skew more left than the Conservatives, and are in fact closely aligned with the median of British public opinion: 59 per cent of Reform supporters think that utilities such as water and energy should be controlled by the government, compared to 57 per cent of the general public. 69 percent of Reform voters also believe that big business takes advantage of ordinary people (the same proportion as the public overall), compared to 56 per cent of Conservative supporters.

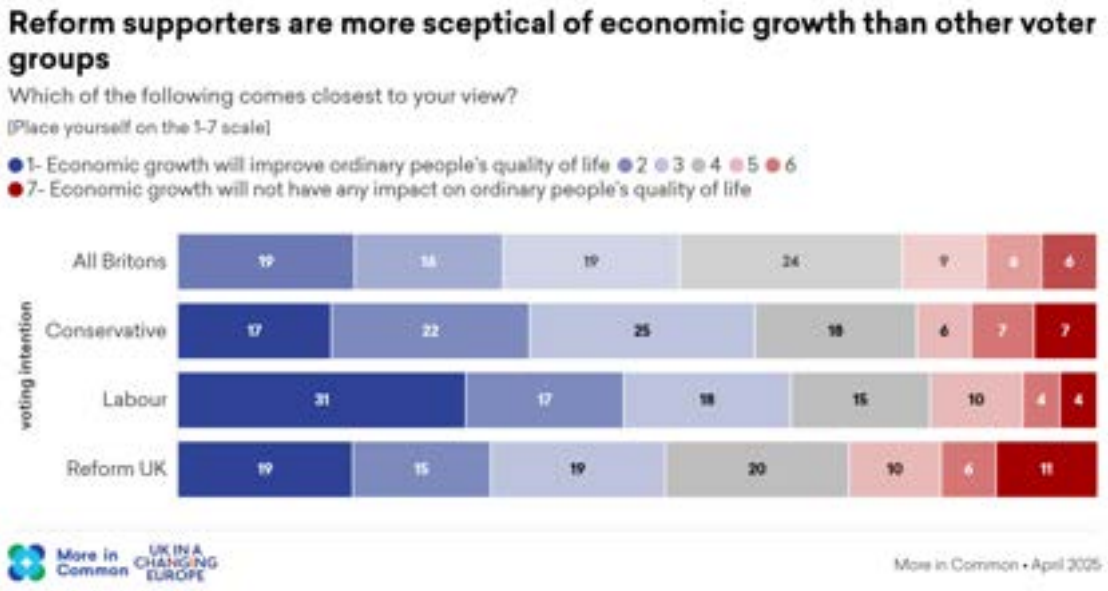
From focus groups, it is clear that Reform supporters have a strong perception of fairness and reward that underpins many of their views on the economy. Many are highly attuned to instances where they feel that Britain is being 'ripped off', by as they see it illegal immigrants, and those claiming benefits, but also large corporations, big tech and billionaires. A sense that deserving groups who have done their bit - namely pensioners and working people - are being exploited or overlooked is one of the key factors that drives support for Reform. Reform supporters are also far more likely than Conservative voters to believe that working people do not get their fair share of the nation's wealth.

> *"I think that the financial state of the country is a bit of a mess. It always seems to come on to the taxpayer and* ***the workers always seem to take the brunt of it.****"*
>
> **Rob, Electrical Engineer, Rotherham, Reform supporter**

This pessimism is also evident in Reform voters' views on taxation: 77 per cent believe working people pay too much tax, versus 55 per cent of the general public.



Reform supporters also tend to be more negative than others about the benefits of economic growth. Just over half of Reform supporters believe that economic growth will improve the lives of ordinary people (53 per cent), this figure is lower than for Labour supporters (66 per cent) and Conservative supporters (63 per cent).



Social issues

Reform UK supporters typically hold more socially conservative views than supporters of other parties, with the exception of Conservative supporters, who show similarly authoritarian viewpoints. For example, Reform supporters are the most likely to say that young people lack respect for British values, and to support the death penalty. However, on social issues related to the family - debates that highly polarising in the United States and other countries - Reform supporters are reasonably aligned with the broader public in their support for gay marriage, access to abortion and gender equality.

Reform voters are almost as likely to support gay marriage as the public as a whole (59 per cent compared to 63 per cent). However, on gender identity and trans rights there is more of a divergence: 67 per cent of Reform supporters and 48 per cent of Conservatives believe rights for trans people in the UK have gone too far, compared to 39 per cent of the public overall. In focus groups, Reform supporters often raise concern about issues relating to gender identity and sex-based rights.

> *"I never know whether it's the right way to go. I think back to times when homosexuality was outlawed and the way homosexuals were treated, and I don't want to be part of treating another group of people, which I don't know anything about, but I'd hate to discriminate. But I think you've also got to keep the common sense."*
>
> **Jackie, childminder, Thurrock, Reform voter**

Reform supporters also back shifts to greater gender equality at only a slightly lower rate than the public as a whole: 68 per cent say the increased participation of women in education and the workforce as a positive development - compared to 74 per cent of the wider public.

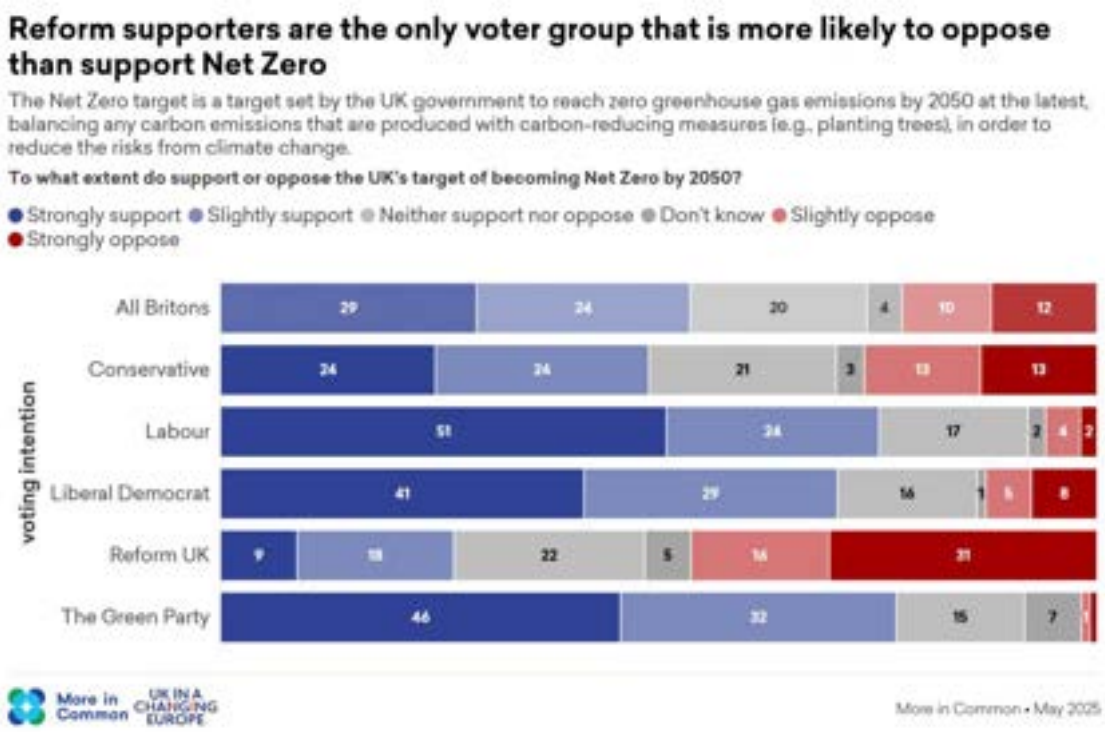
However, thirty per cent of Reform supporters believe that women now have an advantage over men- the highest proportion of any party's support base, suggesting a perception among some that feminism has gone too far. However, a majority (80 per cent) believe that caring for children, family and the home should be the equal responsibility of men and women, in line with public opinion as a whole (83 per cent).

On abortion, Reform supporters are in line with the median of public opinion. 46 per cent of both Reform voters and the public overall believe the legal limit should stay at 24 weeks. The same proportion of Reform, Conservative and Labour supporters voters say the limit should be decreased (25 per cent respectively). This puts Reform's leader, who has expressed support for reducing the legal limit, at odds with many of his supporters.

Climate change

Reform UK voters are the least likely of any group to prioritise climate and environmental issues. Conservative supporters are three times more likely to do so.

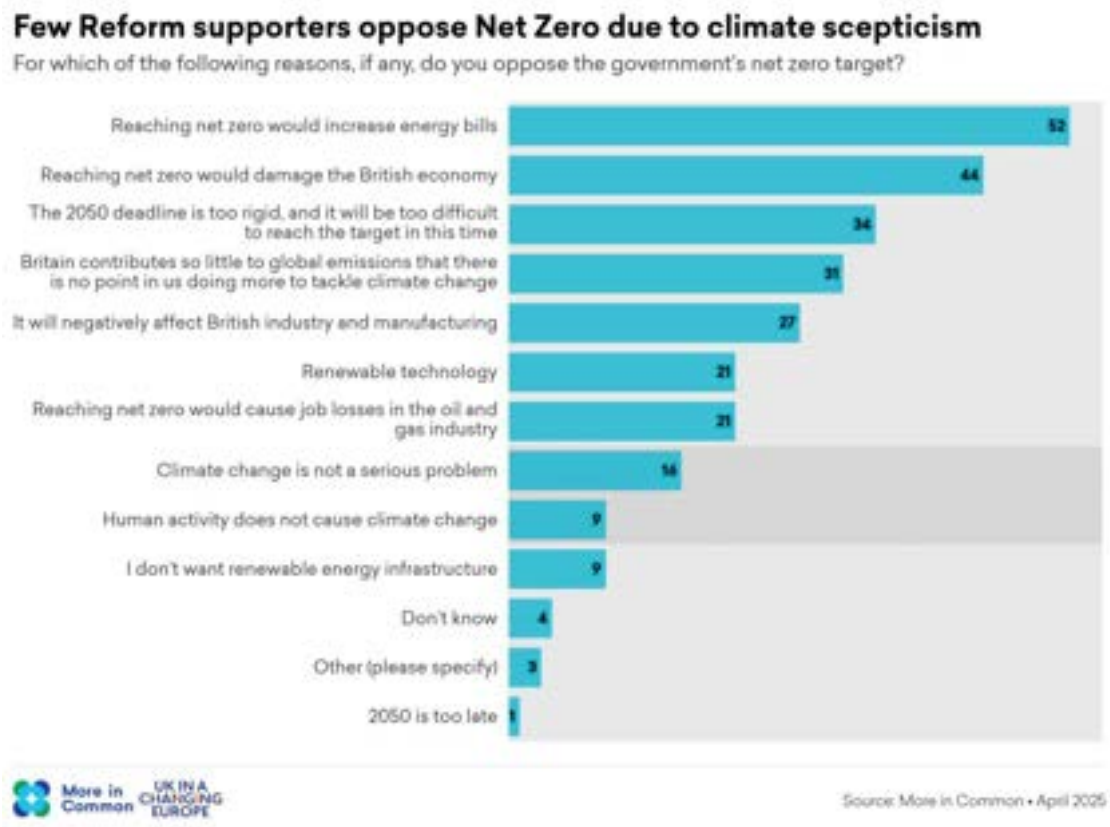
This group is also the most likely to say that the government should abandon its target to reach net-zero carbon emissions by 2050, and the only voter group in which opposition to Net Zero outweighs support: 47 per cent oppose the target, compared to 27 per cent who support it.



Yet Reform supporters tend to support climate action. At the General Election, three in five (59 per cent) Reform voters said that they supported the government's plans to create GB Energy, and Reform supporters are still broadly in favour of investing more in renewable energy, with 41 per cent saying they would think better of a politician that increased investment in renewable energy.

Reform supporters' opposition to Net Zero is not rooted in climate change denial. Most accept that it is real and serious. Instead they worry about the impact of transition on energy bills, the economy, and key industries. For example, nearly nine in ten Reform supporters believe UK farmers should be protected when cutting emissions, even if it slows progress on reaching Net Zero.

When asked why they oppose the net-zero target, half of Reform supporters (42 per cent) cite rising energy costs, and 44 per cent point to the broader potential economic impact. Just 16 per cent say climate change is not a serious problem, and less than one in ten rejects the idea that human activity causes climate change.



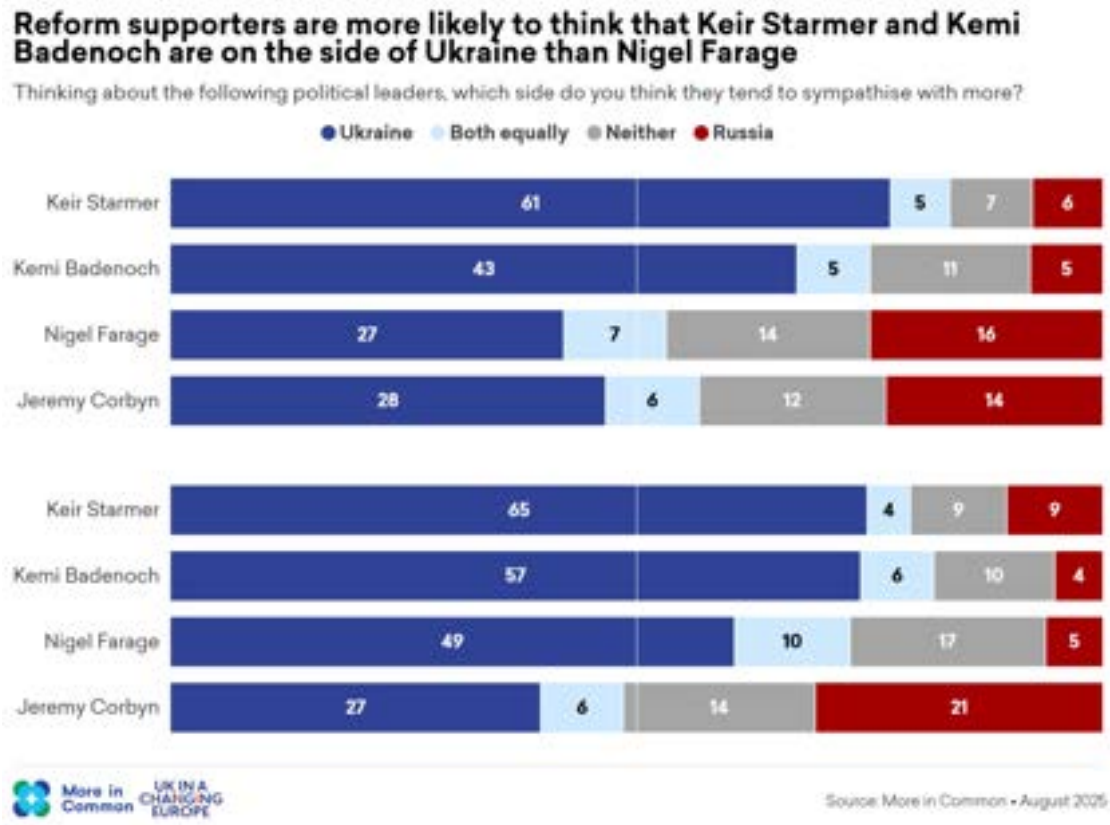
Foreign policy, security and defence

Reform supporters take a cautious approach to Britain's involvement on the world stage. They are more inclined than supporters of other parties to believe the UK should stay clear of foreign conflicts: 44 per cent think Britain should play less of a role in global affairs, compared to 21 per cent of the public overall. Meanwhile, seven in ten feel the UK has been taken advantage of by other countries, compared to four in ten on average.

Given that seven in ten Reform supporters voted to leave the European Union in 2016, it is unsurprising that most think the UK's relationship with the United States takes priority over that with Europe. Reform supporters are less likely than average to see France, Germany, or the EU as allies (though they are still far more likely to say they are allies than enemies) , and far more likely to view the US as one. If the Prime Minister were forced to 'pick sides' between the US and the EU, nearly half (49 per cent) of this group would prefer he choose the US, compared with 33 per cent who would favour siding with the EU. Yet among Britons overall half would rather Keir Starmer align with the EU (53 per cent) than the Trump White House (18 per cent).

However, scepticism toward the 'special relationship' also runs deep. More than four in ten Reform supporters doubt it exists, a higher proportion than that found among Labour, Conservative, or Liberal Democrat voters.

Most Reform UK supporters back Ukraine- 65 per cent sympathise more with the Ukrainian side of the conflict while just three per cent say the same about Russia, broadly in line with the feelings of the public as a whole (66 percent sympathise with Ukraine, three per cent with Russia). Yet while almost half of Reform supporters believe Nigel Farage sympathises more with Ukraine than Russia, the public is less certain- only 27 per cent of Britons feel the same way, with 16 per cent believing Farage sides with Russia. This is higher than the number who feel this way about Starmer, Badenoch, or Jeremy Corbyn.



72 per cent of Reform supporters say it is important for the UK that Ukraine defends its sovereignty - in line with the average for Britain as a whole (72 per cent) . However, Reform supporters are more sceptical than those of other parties about Britain's involvement in the conflict. While 30 per cent believe the UK should back Ukraine until Russia is pushed back to its pre-invasion position, 29 per cent think support should end immediately - almost twice the national average.

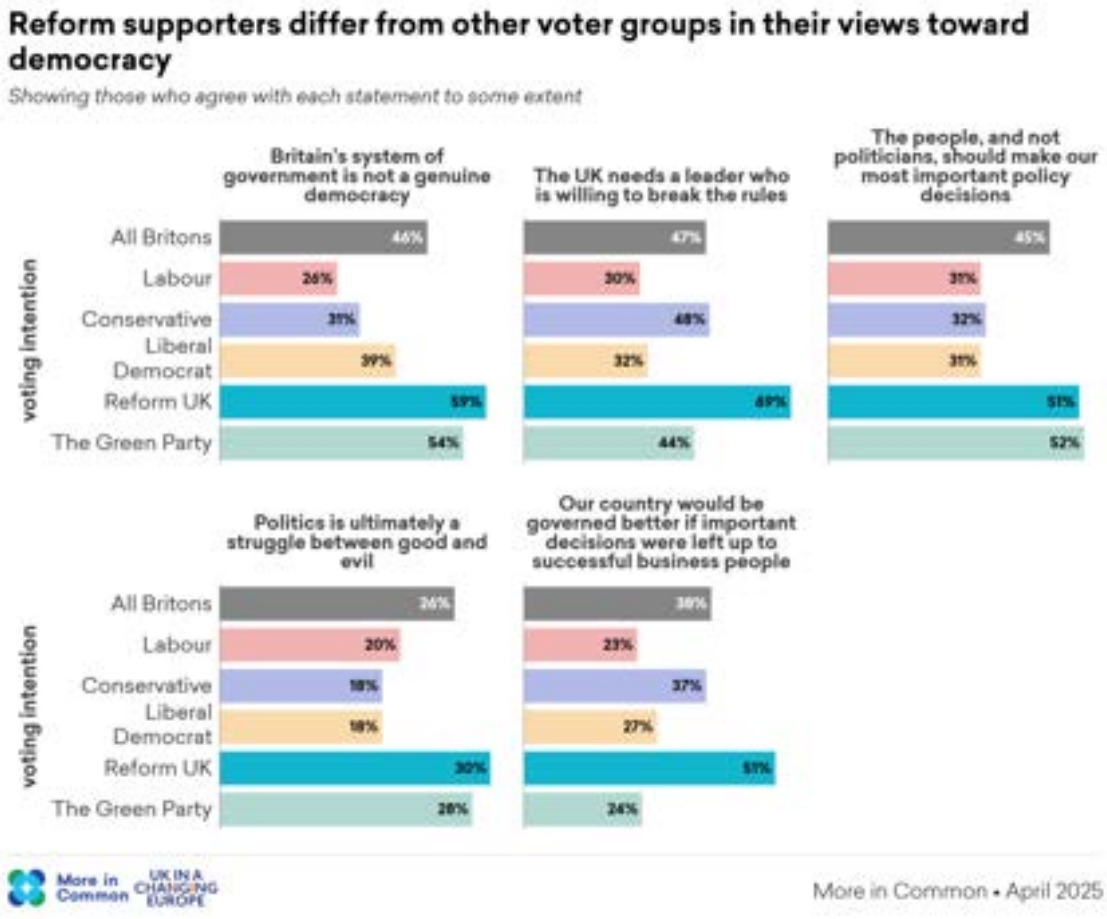
Therefore, many Reform supporters back President Trump's attempts to draw an end to the conflict in Ukraine: 24 per cent believe Trump should receive a Nobel Peace Prize for his efforts to do so, compared to 14 per cent of Britons overall.

Meanwhile, while over half of prospective Reform voters are concerned about the Israel-Palestine conflict, this is the lowest level of concern among supporters of any major party and 22 points below the national average. This group is also the most likely to sympathise with Israel (36 per cent, compared to an average of 15 per cent) and the least likely to sympathise with the Palestinians (14 per cent versus 29 per cent of all Britons). In turn, almost half (47 per cent) say Israel's military response in Gaza has been proportionate, 19 points more than the national average. However, this support for Israel is not unanimous across Reform's support base: more than a third believe the UK should stop all arms sales to Israel, alongside 41 per cent of the wider public.

Views on democracy

While few Britons think the country is on the right track in 2025, Reform supporters are unique in the extent to which they think the problem extends beyond one particular party or moment. Instead Reform supporters are the most likely to think Britain's problems are linked with the operation of the democratic system itself. 43 per cent of this group say that democracy does not work for ordinary people, compared to 35 percent of Britons overall.

Three in five (59 per cent) Reform supporters go further and say that Britain's system of government is not a genuine democracy; only Green Party supporters come close to Reform supporters in this.



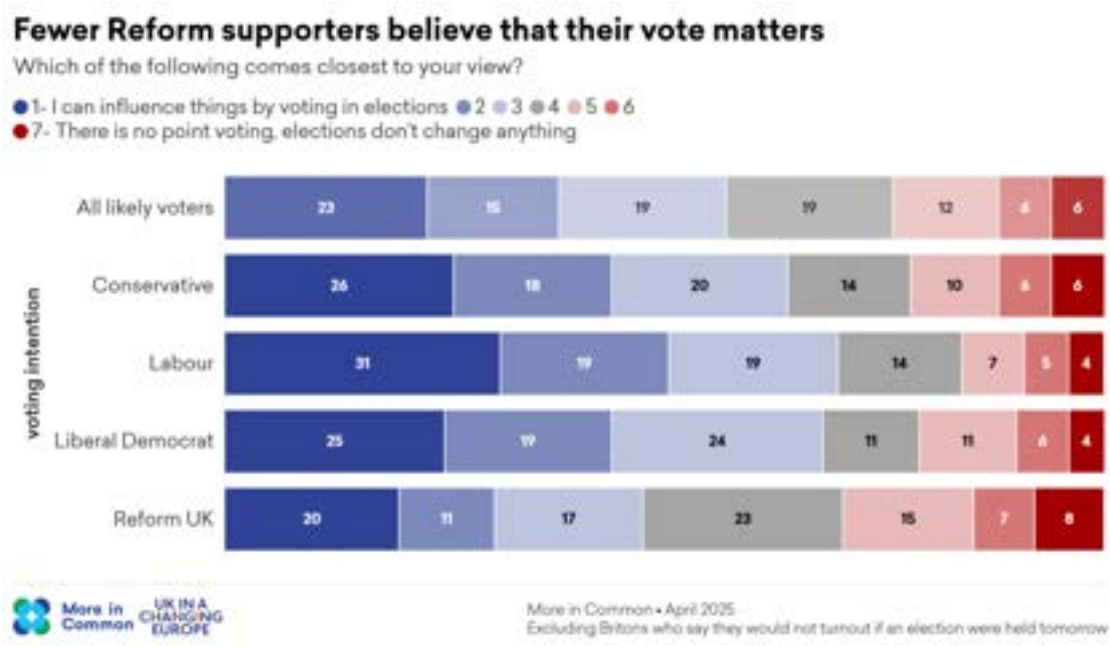
That lack of faith in the democratic system sits alongside Reform supporters' tendency toward a variety of populist positions; they are the most likely of any major party supporters to say that people rather than politicians should make decisions for the country, that politicians should listen to what the people want, and that normal people understand the country's problems better than experts. Reform supporters also show higher support for direct democracy over representative democracy, and higher still support for a leader who is willing to break the rules to get things done.

Those who support Reform are also more likely than any other voter group to say that politics is ultimately a struggle between good and evil, and half think that the country would be governed better if it were run by successful business people rather than politicians, compared to 38 per cent of the public.

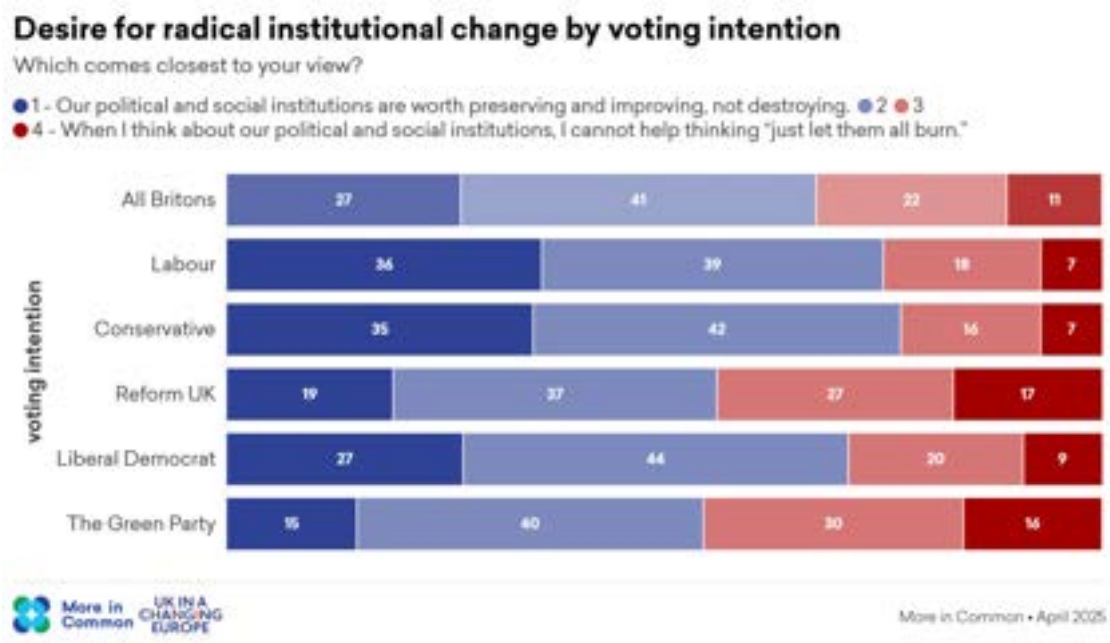
Reform supporters are also less likely than other voters to believe their vote makes a difference, and a significant minority (30 per cent) tend to the view that there's no point voting because elections don't change anything.

For some Reform voters, this sense that voting is pointless and that the system will never change is habitual. However, even some of those that voted in the last election - including 45 per cent of Labour to Reform switchers - now lean towards the view that elections don't make a difference - perhaps reflecting their impatience with the slow pace of change since the new Government was elected.

> *"It just feels like there's no transparency with any of it. You always feel like you're being lied to, but whatever party there is, you don't ever feel like you're actually in control of the country yourself. Even though you voted and even though you are paying out taxes that are funding everything, you don't feel like you've got any power."*
> **Kelly, Cremator Technician, Ashfield, Reform voter**



A sense that politics is broken runs through every conversation with Reform voters, supporters, and considerers. Fixing Britain's broken politics is therefore central to the party's appeal. Yet there is a split as to how deeply the problems with our politics run, and how radical are the solutions. Asked whether our political institutions are worth preserving and improving, nearly half (44 per cent) of Reform supporters say they cannot help thinking: "just let them all burn", second only to those who support the Green Party. Reform supporters tend to want radical transformation, but this desire for change takes different forms.



For some supporters, Reform offers a healthy challenge to mainstream parties; its value lies in shaking up the political establishment without replacing it altogether. They see the party as an outside force that compels Labour and the Conservatives to take issues more seriously and compete harder to deliver the public's priorities.

> *"Well I look at Reform a bit like Aldi and Lidl really. Because they get Sainsbury's and Tesco to lower all their prices. That's how I see Reform. Reform brings up subjects when no one else will talk about it. (...) So that makes the Conservative and the Labour party take notice. Whereas before they wouldn't care about those subjects."*
> **Michael, painter decorator, Peterborough, Reform considerer**

For others, the anger runs deeper. They see Britain's democratic institutions as fundamentally failing, and believe it may be time to take a risk on something entirely different. For these voters, incremental change no longer feels tenable in the face of rising living costs and struggling public services. That belief that the system is broken beyond repair also means they are more willing to roll the dice on radical change, even if it means more chaos in the short term - because little can be worse than the status quo.

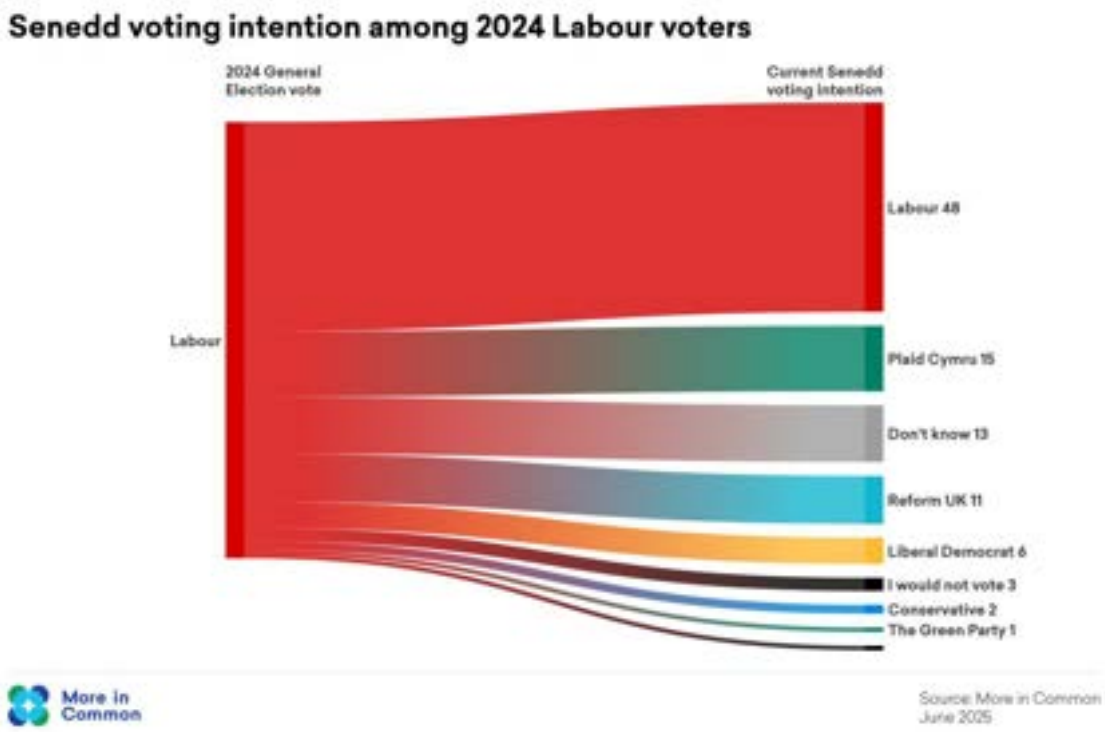
> *"I think we'll probably have to follow somebody like Trump to smash the whole lot up and start again - as much as it's caused chaos around the world. But I mean, I think if we just keep doing these little token nicks and tucks - giving a little 10 pence there and a 10 pence here, and a little rise... even the minimum wage has not risen that much, cos we still can't afford to live. So we need something I feel, I want to say more radical."*
>
> **Jackie, childminder, Thurrock, Reform voter**

Reform in Wales

With the next Senedd election due to take place in May 2026, Reform UK has the potential to reshape the political geography of Wales, bringing an end to Labour's dominance in one of its historic heartlands and, for the first time in the history of the Senedd, possibly opening the door to a First Minister from outside the Labour Party.

More in Common's Senedd polling suggests that were an election held this summer, it would likely be a tight race between Plaid Cymru and Reform UK for first place, with Labour falling into third place. Less than half (48 per cent) of Welsh voters who backed Labour in last year's General Election would vote Labour in a Senedd election held today.

Two main dynamics are driving Reform's rise in Wales. First, Labour's vote is split on the left, with Labour voters defecting to Plaid Cymru, pushing Plaid to a record high vote share - though still well short of what they'd need for a majority. Second, Reform is consolidating its dominance on the right of Welsh politics, absorbing a third of 2024 Conservative voters.



Modelling these vote shares onto seats using the D'Hondt formula in Wales' new parliamentary boundaries, we find Reform narrowly ahead on 31 seats, with Labour and Plaid Cymru both on 28. In order to secure the 49 seats needed to form a majority, the only possible feasible government in this outcome would be a Labour-Plaid Cymru coalition, and a Labour First Minister no longer seems like a certainty.

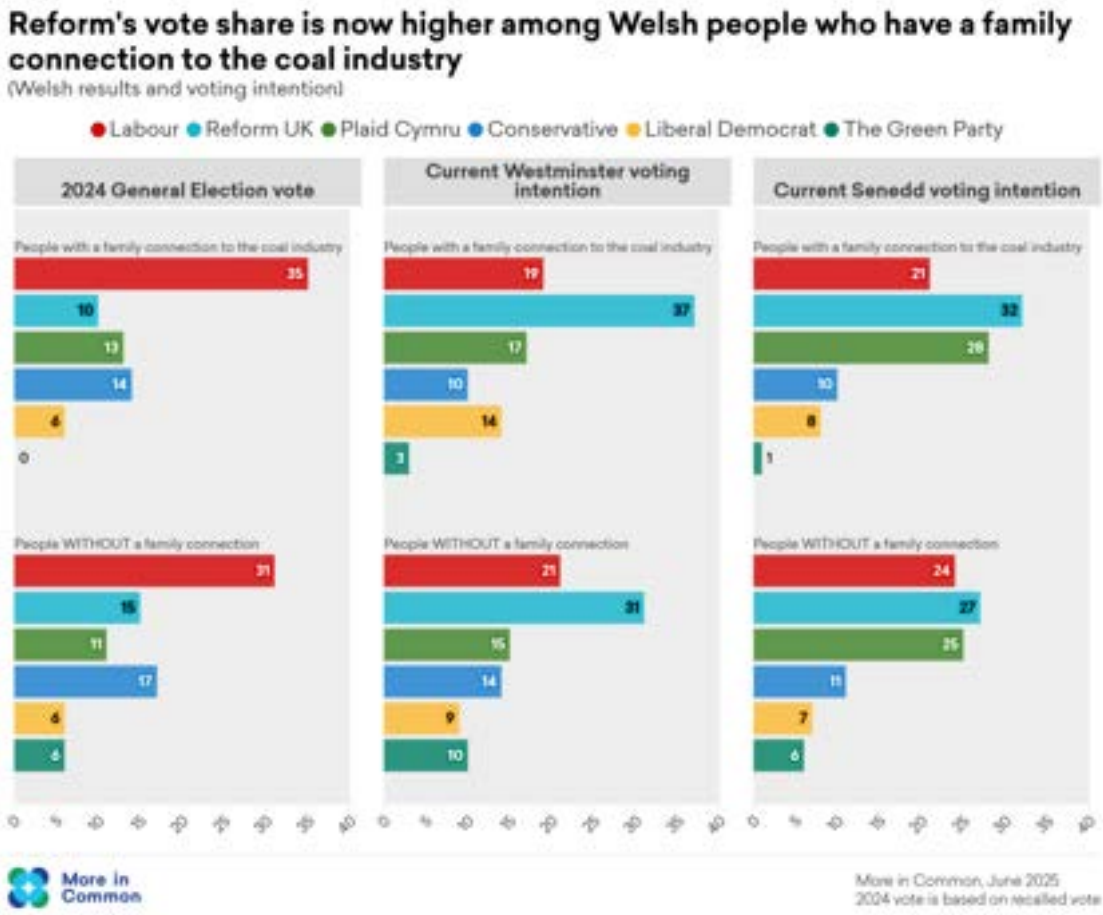
Reform's gains could be even more dramatic in Westminster. More in Common's Westminster MRP from July 2025 suggests that, in an election held this summer, Reform UK could win 24 of the 32 Welsh Parliamentary seats, 22 of which would be direct gains from Labour.

Some of the most dramatic swings toward Reform UK would be seen in the Welsh valleys - one of Labour's historic strongholds. Of the nine coalfield constituencies commonly considered to be part of the Welsh Valleys, eight have elected a Labour MP in every single general election since they were created at the start of the 20th Century; this model suggests that every single one of them would now elect a Reform MP. In Merthyr Tydfil - the parliamentary constituency of Labour's founder and the Prime Minister's namesake, Keir Hardie - Reform in this model would earn 39 per cent of the vote while Labour would earn 21 per cent.

Part of the reason for Reform's greater success in Westminster is votesplitting among disillusioned former Labour voters. While 2024 Labour voters are most likely to have abandoned the party for Plaid Cymru in the Senedd, the biggest group of defectors in Westminster voting intention has gone to Reform.



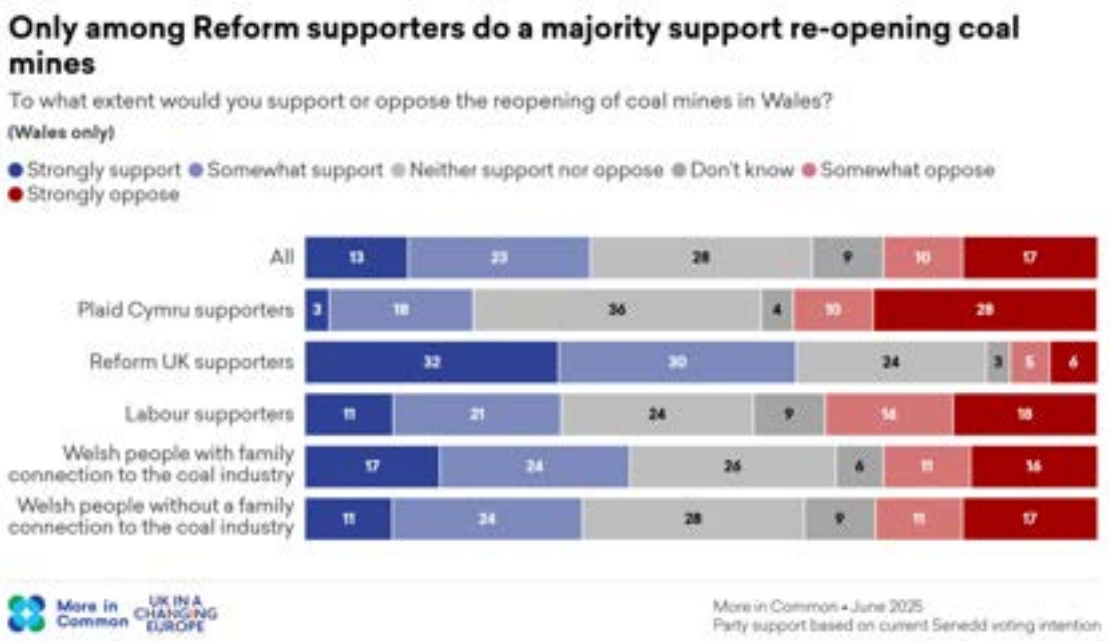
Wales' industrial and mining heritage still shapes its politics, but Reform UK could redefine the relationship between coalfield history and political loyalty, and erode Labour's dominance in mining communities. In the 2024 General Election, Labour performed better among voters with family ties to coal, while Reform did slightly worse. In today's voting intention (both Senedd and Westminster), that pattern has reversed: Labour's support is weaker among families connected to the industry, while Reform's is several points stronger.



Reform's call for re-industrialisation might appeal to many, but would need to be balanced with public concerns about climate change. More than three in five Welsh people (62 per cent) worry about climate change, and support for net zero outweighs opposition by almost two-to-one (47 per cent to 25 per cent). While Reform's policy of re-opening coalmines is backed by 62 per cent of the party's supporters, it proves divisive elsewhere: Plaid Cymru voters oppose it by 38 per cent to 21 per cent, Labour voters are split (32 per cent support, 34 per cent oppose), and even among those with family ties to coal, support falls short of a majority (41 per cent). A policy of reopening the mines would be unlikely to broaden the Reform's appeal beyond its core base.

> *"I think (Farage) is off his head. Saying he's going to re-light the blast furnaces. Does he not realise they've all melted and he couldn't do it even if he wanted to? But I think he will get things done without a doubt. He's going to shake it up if he gets in."*
> **Carla, physiotherapist, Swansea, Reform supporter**

> *"Nigel Farage? No, not a big fan of him. Some things that Reform stand for, yes, but they could definitely use better terminology to put it out there. I do think that sometimes they say things for a strong reaction and to get clicks."*
>
> **Ken, Operations Manager, Aberdare, Reform considerer**

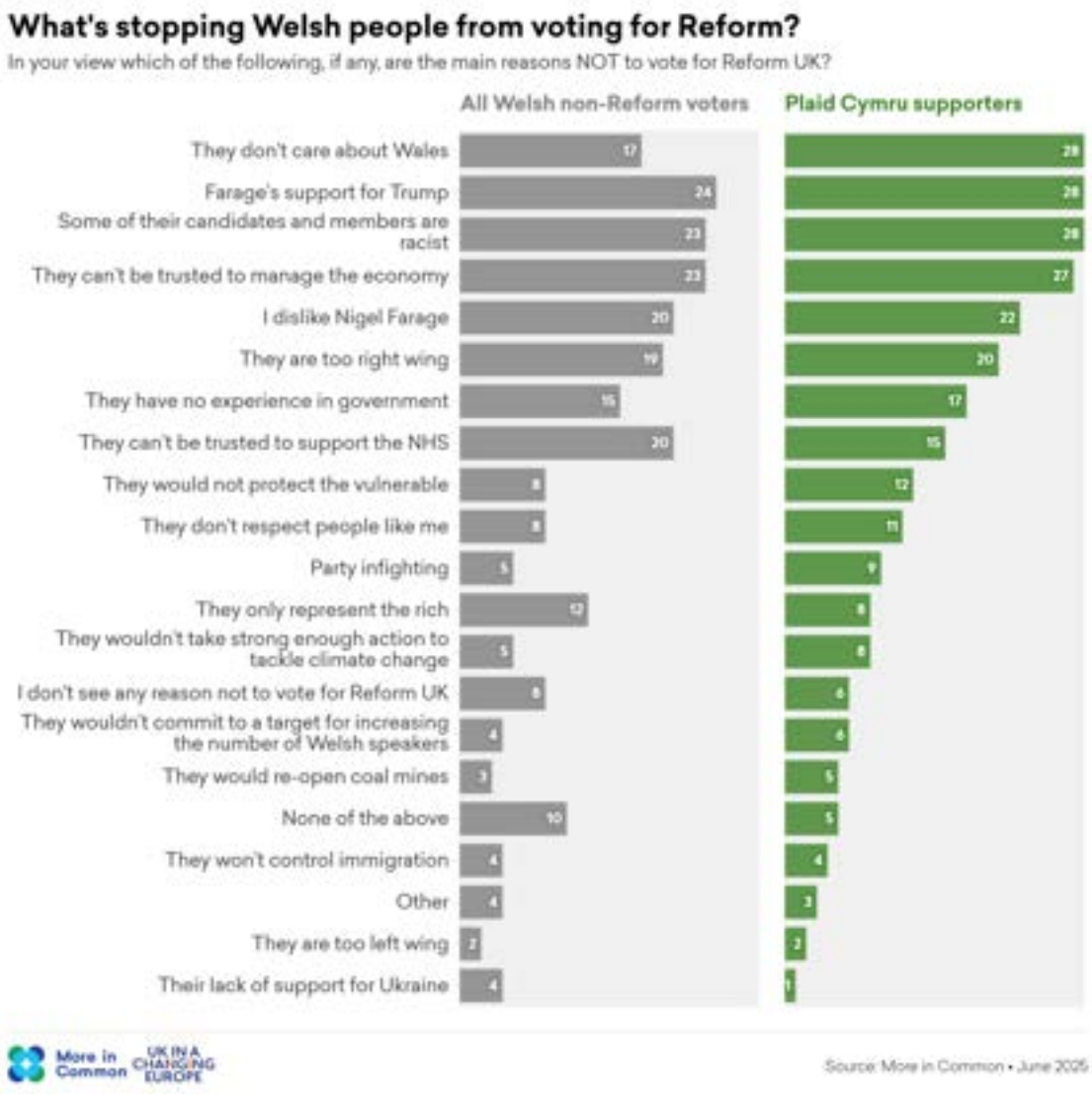


Nigel Farage is now one of the least unpopular party leaders in Wales, with a net approval rating of -10, ranking highly both compared to the Prime Minister and Leader of the Opposition, as well as their Welsh counterparts. Of the main party leaders, only Plaid Cymru's Rhun ap Iorweth has a higher net approval rating in Wales, at -7. Yet in focus groups, it seems that Reform's lack of a Welsh leader is a barrier for some. One participant explained that they would vote for Reform in a General Election, but that there would be "no use" electing them to the Senedd.

> *"The only thing is, I didn't realise till last week is that Reform haven't even got a Welsh leader. So what use is that to us? (…) I'm not a Plaid fan, never have been. Don't know much about them. So it's going to have to be Labour and it's because there is no Reform Welsh leader. So why would you vote for them in Wales when there won't be a leader? Farage is not going to come and live in Cardiff."*
> **Carla, physiotherapist, Swansea, Reform supporter**

Asked about reasons not to vote for Reform UK, the Welsh public give similar answers to the rest of Britain: Farage's support for President Trump tops the list, followed by racism in Reform's ranks and doubts about economic competence. However, the sense that Reform and Farage do not truly care about Wales - evidenced for some by their lack of Welsh

Leader- is pushing some voters who want to shake up the status quo toward parties like Plaid instead. Among supporters of Plaid Cymru, the top reason they wouldn't vote Reform is the perception that the party doesn't care about Wales. Given that Reform is competing with Plaid Cymru for disillusioned Labour voters, they may need to demonstrate a stronger connection to Wales if they hope to consolidate their gains.



Reform in Scotland

For many years, Nigel Farage and his parties struggled to gain a foothold in Scotland. Yet Reform UK does now seem to have begun to make inroads north of the border. While they aren't likely to win seats in Scotland on the same scale as in Wales or England, it's possible that Reform UK could help to determine the outcome of the 2026 Holyrood Election.

Despite Labour's sweeping gains in Scotland at the 2024 General Election, discontent has grown during the party's first year in government. By the middle of 2025, Keir Starmer's approval rating in Scotland had fallen to -32, down sharply from +6 immediately after the election.

More in Common's July MRP suggested that if a General Election were held today, Labour's 2024 breakthrough could be largely reversed: the SNP would take 42 of Scotland's 57 seats, including 31 directly from Labour. Reform is not projected to win seats, but could reach as high as 27 per cent of the vote in some constituencies, eating into Labour's support and making it easier for the SNP to swipe those seats. Of Labour's 2024 voters in Scotland, 12 per cent now say they would back Reform, compared to just 6 per cent who have switched directly to the SNP. The SNP may gain the most seats, but Reform's growth compounds Labour's weakening position.



Reform's growth was evident in the June Hamilton, Larkhall and Stonehouse by-election. Labour held the seat, but Reform surged to 26 per cent, coming third. In a focus group, voters described Labour and the SNP in the same terms that disillusioned English voters often use about Labour and the Conservatives, with some concluding that, despite doubts about Farage, it might be worth "giving someone else a chance."

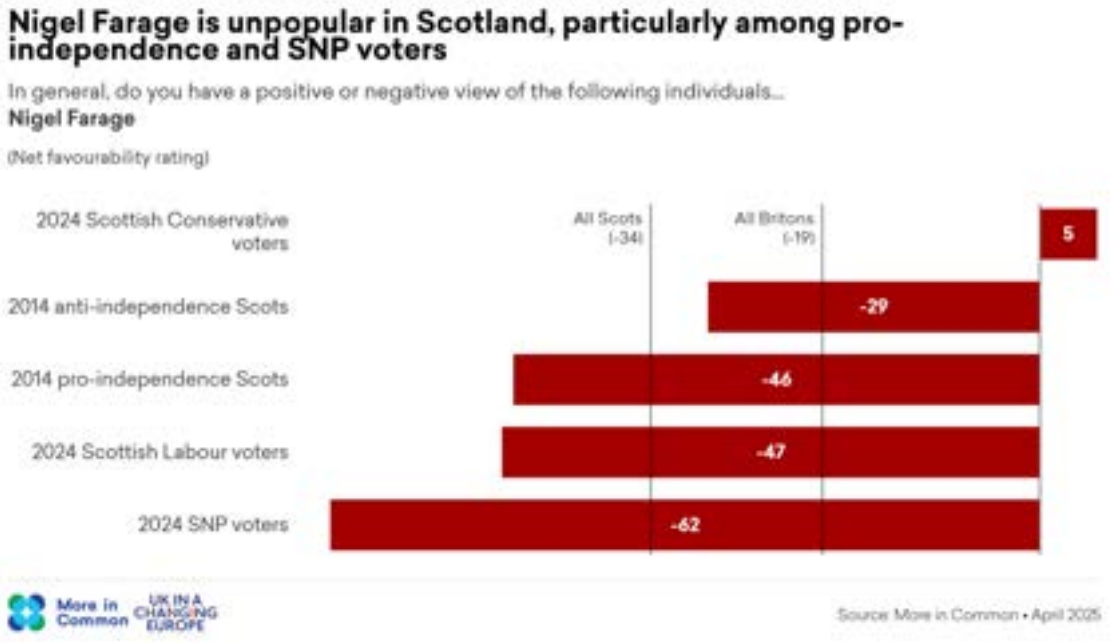
> *"I've always been an SNP and a Labour voter and I've always voted, but I'm kind of running out of options now and I kinda think a change is needed. And it makes me think, are Reform that change? Because who else am I going to vote for?"*
> **Liam, accountant, Stonehouse, Reform considerer**

Disappointed Labour voters pointed to what they saw as broken promises and stagnating public services. Their dissatisfaction seems to be deeper than in England: while Starmer's post-election approval ratings among Labour voters were initially similar across Britain, they have fallen much more steeply in Scotland. Among 2024 Labour voters, Starmer is now at +6 in Scotland, compared to +21 in England.

> *"I think they've got off that terrible start. Everything they promised, they've never followed through. They said they wouldn't put our taxes up, they've done that. They said we would keep the economy stable. That's not happened. And it's the same as what it was during COVID. The cost hasn't went down. They said they were going to cut waiting times to the NHS. They've actually just got bigger and bigger since they were in, I don't think that they've followed through on any of the promises at all."*
> ***Karen, nurse, Larkhall, Labour to Reform switcher***

> *"Personally I wouldn't mind paying a higher rate of tax if we had good public services, but we don't get our bins lifted. Public transport's shocking. The streets are full of potholes and it's just nae working."*
> ***Ernestine, administrator, Hamilton, Labour to Reform switcher***

But while disillusionment with the Labour government is widespread in Scotland, so too is apprehension about Reform. Nigel Farage has a net favourability rating of -34 in Scotland, far lower than the Britain-wide average of -19. And it is even lower among Scots who voted for independence in 2014 (-46), voted Labour last year (-47), or voted for the SNP (-62).



Labour's success in 2024 relied on appealing on both sides of the independence debate, as voters prioritised penalising the incumbent SNP. If Reform hopes to capitalise on Scottish voters' dissatisfaction with the Labour government, they will need to do the same.

Reform UK does seem to show some signs of being able to do that. While Reform's vote share is more than twice as high among Scots who voted against Scottish independence than those who voted for it, the party is in third place among both pro and anti-independence Scots. In fact, their vote share among pro-independence Scottish voters is within two percentage points of Labour - suggesting that unlike the Conservatives, Reform could appeal to Scottish Nationalists.

Chapter 2 - The disillusioned broad church: Fault lines in Reform UK's support base.

- Reform's base is more diverse than in July 2024, but potentially harder to hold together. Analysis of the party's supporters using More in Common's segmentation shows that the party is now made up of several 'tribes' of voters, each with distinct views on authority, economic policy and the scale of change the country needs.

- Reform voters come from very different places. The views of those who have switched to Reform from Labour or the Conservatives since the general election often diverge not only from Reform's core base, but from each other. Those who have moved from Labour tend to be more left-leaning on economics, more open to net zero and action on climate change. Those defecting from the Conservatives are more likely than other Reform supporters to prioritise Ukraine's defence, and far more right-leaning economically.

- Of all those who are likely to vote in a future election - but currently do not support Reform UK - around one in five (18 per cent) would be open to doing so. This group of 'considerers' tends to be more moderate than Reform's base, less socially conservative, less concerned about immigration's cultural impact and more supportive of net zero - in most ways, far closer to the median of public opinion than to Reform's 2024 base. Winning the support of this group is key if Reform wants to reach its maximum ceiling of support.

- In this context, there are several key fault lines that could become divisive among Reform's growing voter base. These include:

    - *Radical versus incremental change.* Reform's coalition is united by dissatisfaction with the status quo, but it's supporters have different views on the scale and pace of change needed. Reform's core base - Dissenting Disruptors - want to see the party shake up the system, whereas their other key growth segments - Rooted Patriots and Traditional Conservatives - value competence and stability.

    - *Media and news sources:* Reform loyalists are more distrusting of mainstream media and drawn to GB News and online sources, while switchers are more willing to engage with established outlets.

    - *Key issues like Ukraine and Net Zero:* Reform's newer supporters tend to be more sympathetic to Ukraine than its loyalists and are more likely to see the conflict as an issue of importance for the UK. Similarly, they are less

opposed to Net Zero and want to see the government take stronger action on climate change.

- *The economy:* The party's new converts have very different starting points on the economy, and favour different approaches: it's 2024 base tends to lean slightly more toward a low tax and spend model of government than its newer voters, who are more likely to value equality and - in some cases - redistribution of wealth.

Cracks emerging

Reform's voter base is changing. As the party's vote share expands, their new supporters are becoming less male, less online and, in some ways, less radical than their 2024 base.

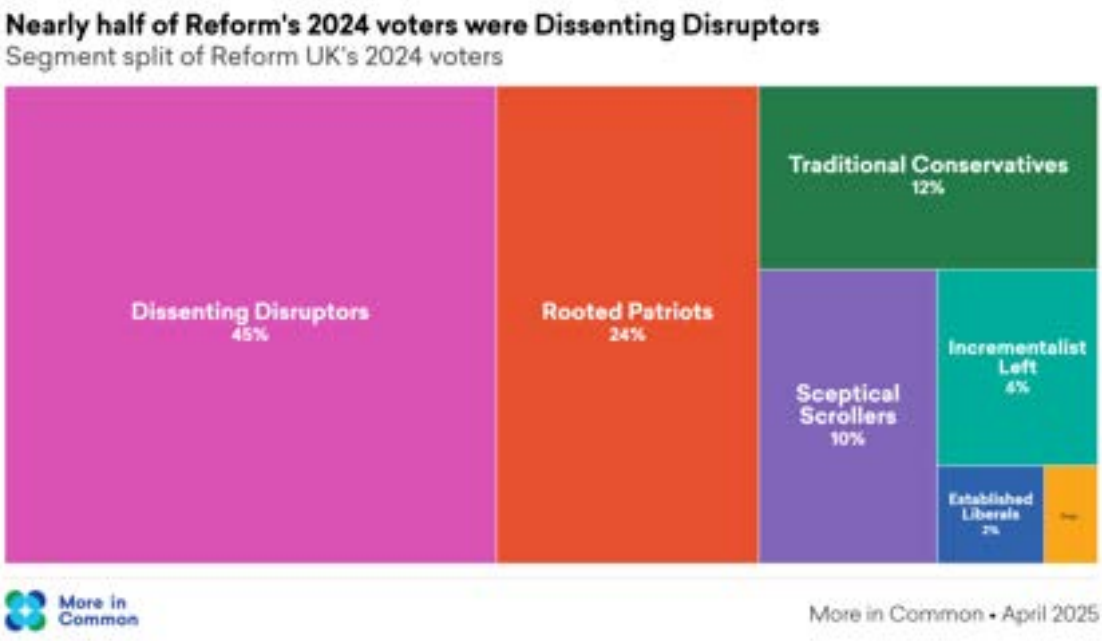
As a result, Reform's voter coalition is beginning to look less like an ideologically cohesive block, and more like a 'disillusioned broad church'. They are united in their views on immigration, and a broad sense that the country is getting worse. But on a range of other issues, their worldviews diverge.

To complicate matters further, the new voters the party is attracting are themselves dividing, starting from very different directions on issues like net zero, welfare and redistributive policy, revealing not just a split between Reform's old and new supporters, but deeper fractures within the new coalition itself.

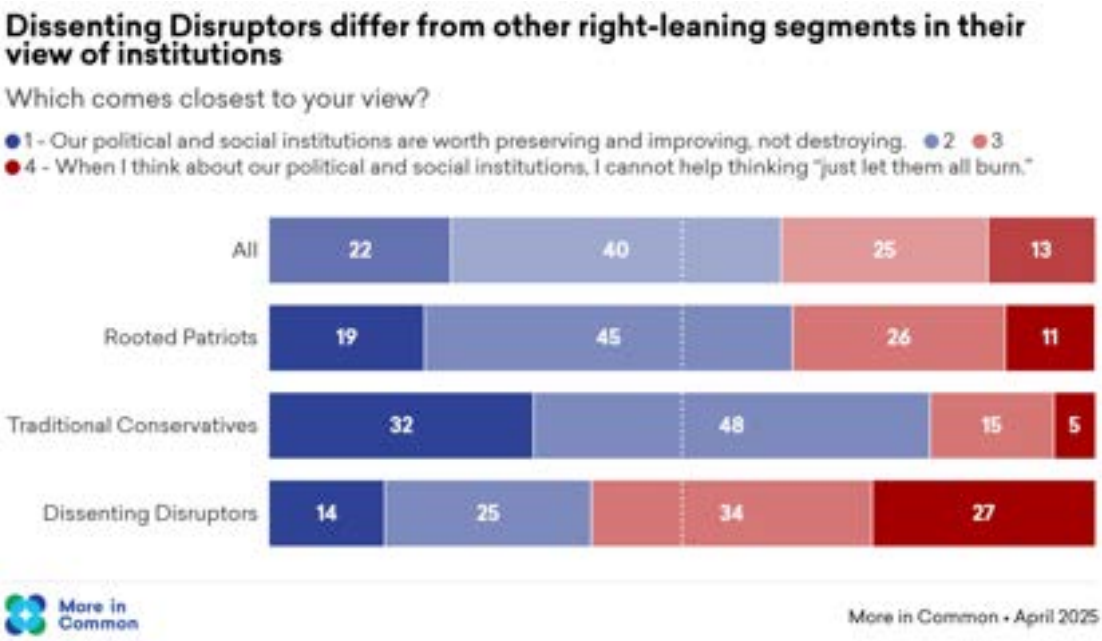
The segments of Reform's new support base

The gaps emerge most clearly using the lens of More in Common's British Seven Segments. More in Common draws on research into Britons' core beliefs, values, and behaviours to place the public into seven distinct groups, based on differences in how people relate to authority, change, community, and the future.

At the 2024 general election, Reform's base was made up primarily of two groups- Dissenting Disruptors and Rooted Patriots. Both of these groups are fed up with the status quo, distrust politics and politicians and feel threatened by changes they think make the world less safe and less secure. They hold socially conservative views on many topics, such as immigration, but differ in what they think the answer to these issues should be.

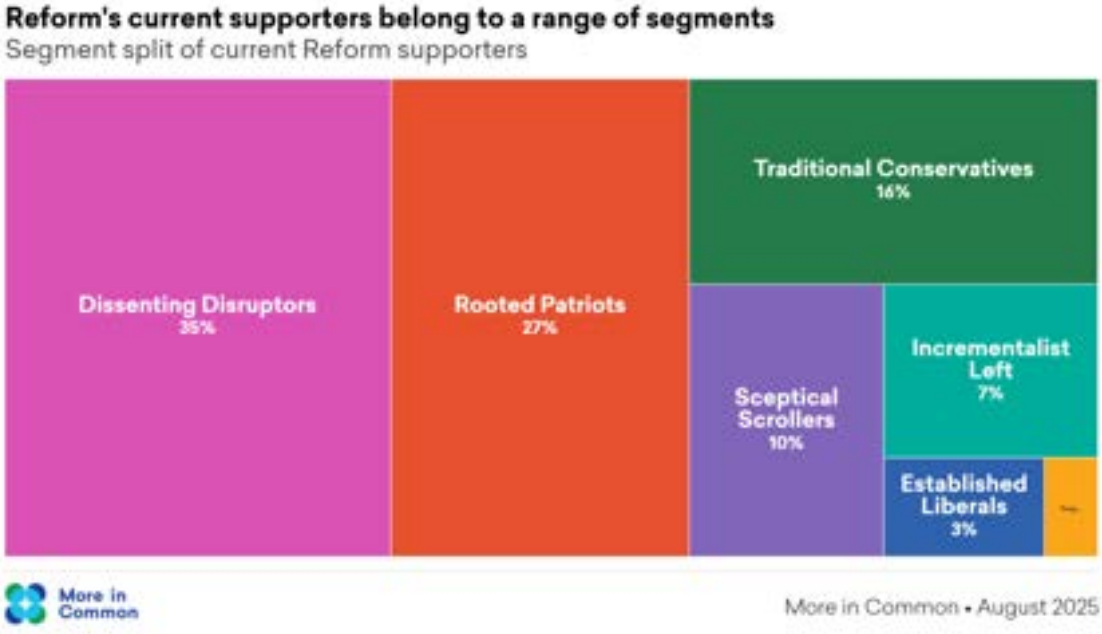


Dissenting Disruptors tend to hold a more radical desire for change, wanting to "burn the system down' and start all over again. They are motivated by cultural issues, such as the social impact of immigration. Meanwhile, Rooted Patriots take a more steady, incremental approach, are grounded in their local communities, and prioritise issues like public services and the economy. Whereas Dissenting Disruptors are more willing to be litigants in 'culture war debates', Rooted Patriots tend to want to avoid them. Balancing these two very different political instincts will be a test of Reform's ability to hold together its coalition.



That task has become even more challenging in the year since the general election, as Reform's base has diversified. Rooted Patriots have become a more significant part of the

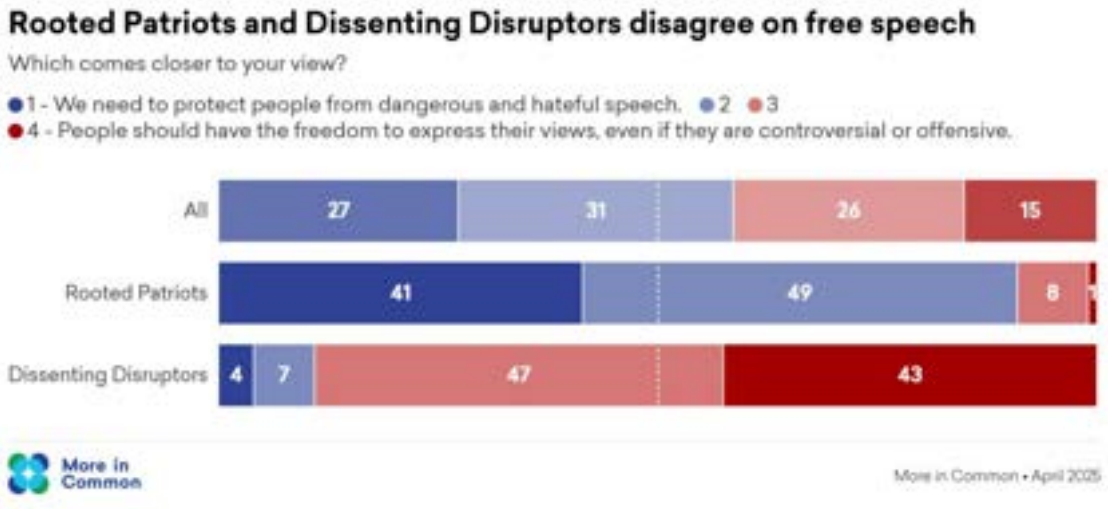
party's voter coalition, but so have Traditional Conservatives. Traditionally the Conservative Party's loyal backbone, this group shares many of the concerns of Rooted Patriots and Dissenting Disruptors about forces of change such as migration or the push to net zero. However, they clash with Dissenting Disruptors' appetite for radical change, placing a high value on authority, tradition and institutions, and they diverge from Rooted Patriots on economics, favouring more traditionally economic-right positions in contrast to Rooted Patriots' left-leaning preferences on issues such as inequality and business regulation.



One of the most striking differences between the Dissenting Disruptor core of Reform's voter base and the other segments the party need to appeal to is their views on free speech: while Dissenting Disruptors value free speech above protection from harmful views or hate speech, nine in ten Rooted Patriots lean toward the view that we need to protect people from dangerous and hateful views. In practice, this can cause divergence on issues such as the Online Safety Act - a policy supported by two-thirds of Rooted Patriots but only 44 per cent of Dissenting Disruptors. Reform's intervention on issues of free speech will likely appeal to Dissenting Disruptors, but risks alienating other elements of Reform's base who prioritise safety and order over maximalist freedom of expression.

> *I'm all for freedom of speech, but it comes down to respect. You don't call each other names and you don't do this and you don't do that. But to me it's respect.*
>
> **Margaret, Traditional Conservative, Great Yarmouth**

> *I think people just need to get on with it and stop being so wet.*
>
> ***Annette, Dissenting Disruptor, Margate***

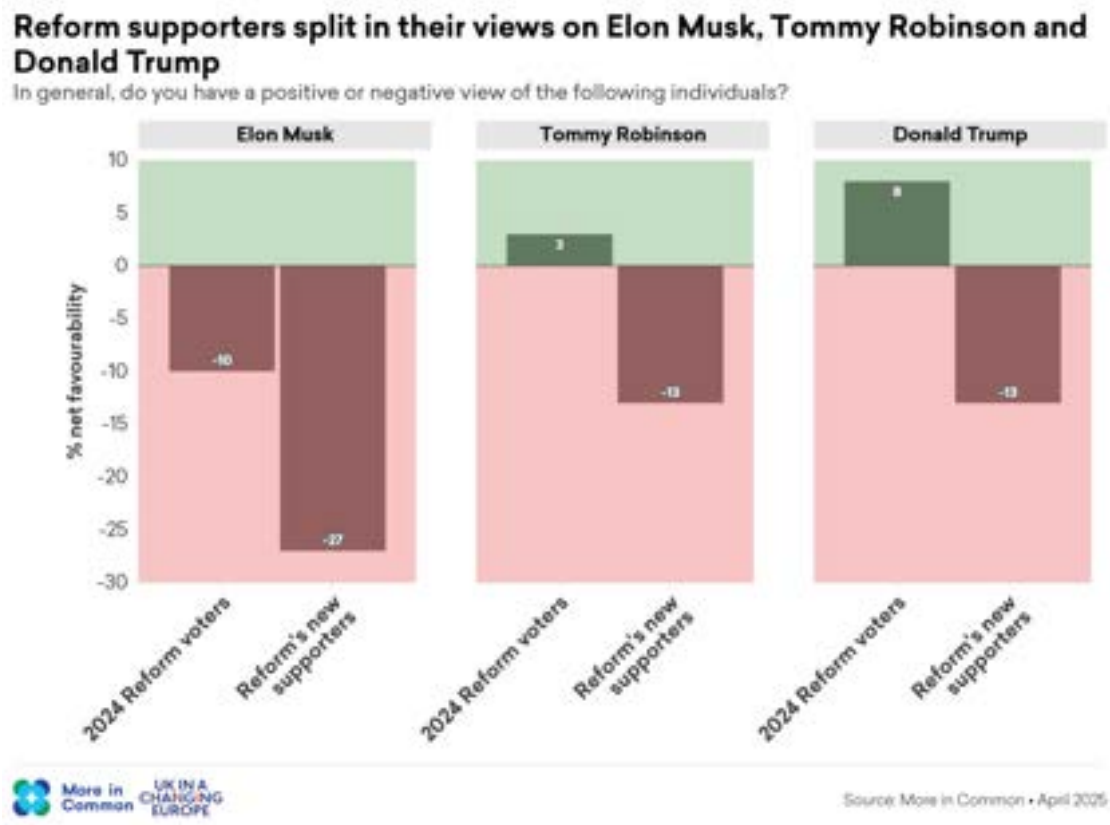


Reform has consolidated its support among Dissenting Disruptors in the year since the election, with over half of this group now saying they would vote for the party. Yet the share of Rooted Patriots (42 per cent) and Traditional Conservatives (45 per cent) who say they would do the same has also grown. At the same time, support among Sceptical Scrollers - a younger, highly online group suspicious of mainstream institutions, who feel let down by the social contract and increasingly drawn to conspiratorial thinking - has risen by 9 points, suggesting they may become a more significant part of Reform's base in the future. Balancing these diverse perspectives on the economy, social issues, mainstream institutions, and the world around us may become a major challenge for Reform as it works to build a coherent policy platform, capable of broadening its appeal.

Reform's new supporters

One of the most striking differences between Reform's new supporters and their 2024 voters are their perceptions of figures on the right of politics. While Nigel Farage is viewed positively among both groups - 82 per cent of Reform's 2024 base view the party leader positively, as do 79 per cent of its newer votes - other figures are more divisive. While Donald Trump is relatively popular among 2024 Reform voters (+8 net favourability), he is unpopular among the party's new supporters (-13). Tommy Robinson and Elon Musk are also significantly less popular among Reform's new supporters.

The media habits of Reform's 'loyalists' differ in two key ways from those of voters who have moved to the party since the July 2024 election. Reform's 2024 voters are more distrusting of the BBC than Reform 'switchers' (35 per cent trust BBC news versus 45 per cent of the party's new supporters'), and less likely to engage with it - showing lower viewership and readership of BBC News.



Reform loyalists are also 12 points more likely to frequently watch GB News compared with the party's newer supporters, who more commonly watch alternatives such as the BBC, Sky and ITV.

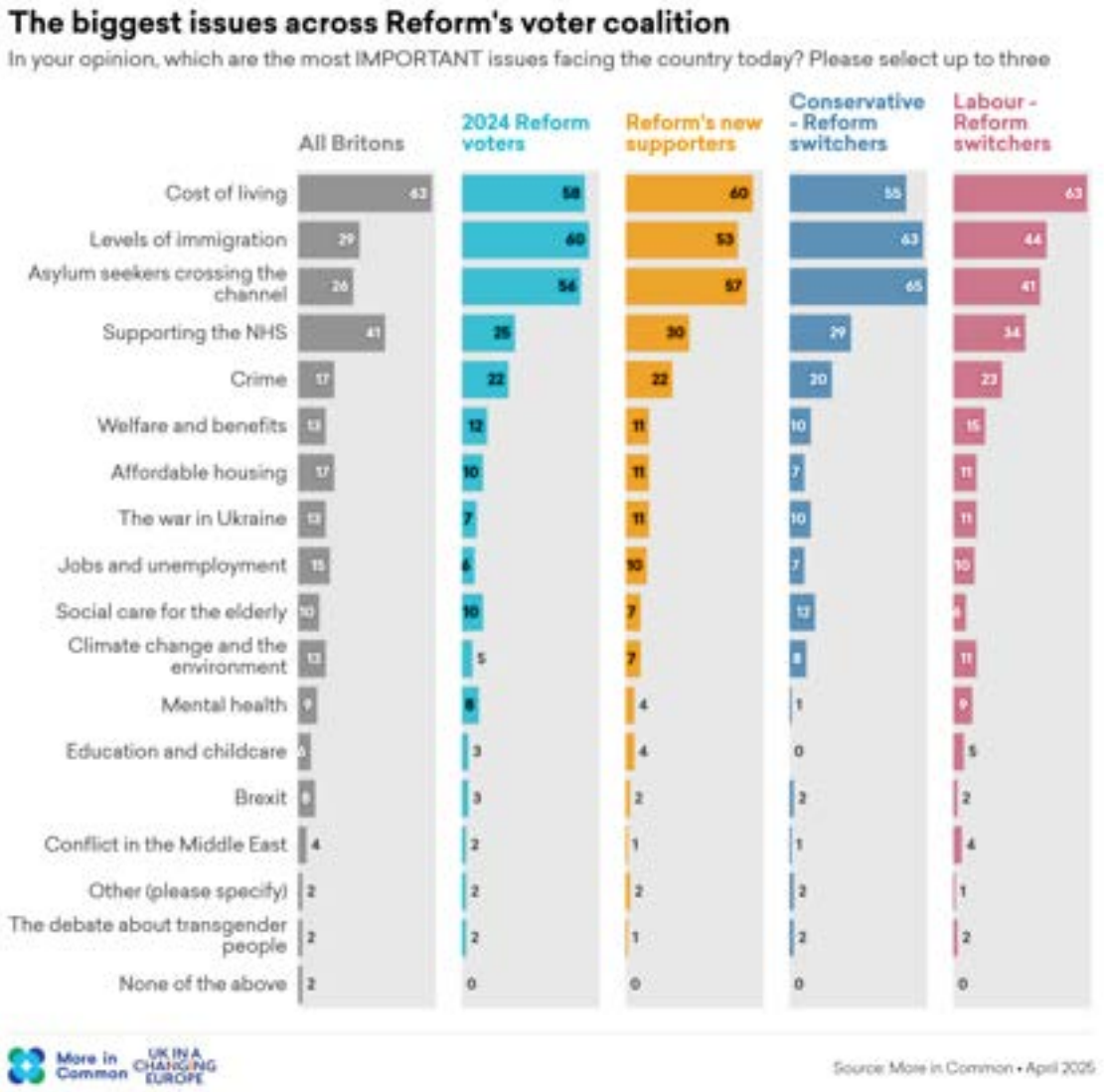
Lower engagement with mainstream outlets is rooted in this group's pronounced distrust of the mainstream media. The Sun and GB News are the only outlets Reform loyalists trust more than new supporters. Instead, many prefer what they see as independent sources that they perceive are free from bias.

This is perhaps best encapsulated by the fact that those Reform's 2024 base are almost evenly split on whether they would be more likely to trust an independent journalist posting about an international conflict on social media (42 per cent) or a major news organisation such as the BBC or The Times (43 per cent). By contrast, Reform 'switchers' are more inclined to trust established media in this scenario (42 per cent) than an online source (31 per cent).

Reform loyalists' combination of high online engagement - they spend more time online and are more likely to use platforms such as YouTube, Facebook, Snapchat, Reddit, and X/Twitter - and low trust in mainstream media appears to shape their worldview. While all Reform supporters show higher than average engagement with conspiracy theories, loyalists are particularly likely to do so: 53 per cent (compared to 47 per cent of new supporters) believe the government exaggerated Covid to control the public, and 71 per

cent think companies hide new technologies from ordinary people to protect their profits, compared to 66 per cent of new supporters.

The divergence between Reform's new supporters and its 2024 voters extends beyond media habits and online engagement and includes to their policy priorities. While Reform's newer supporters also concerned about immigration, they are less single-issue in their focus. As with most Britons, they select cost of living as the number one issue facing the country.

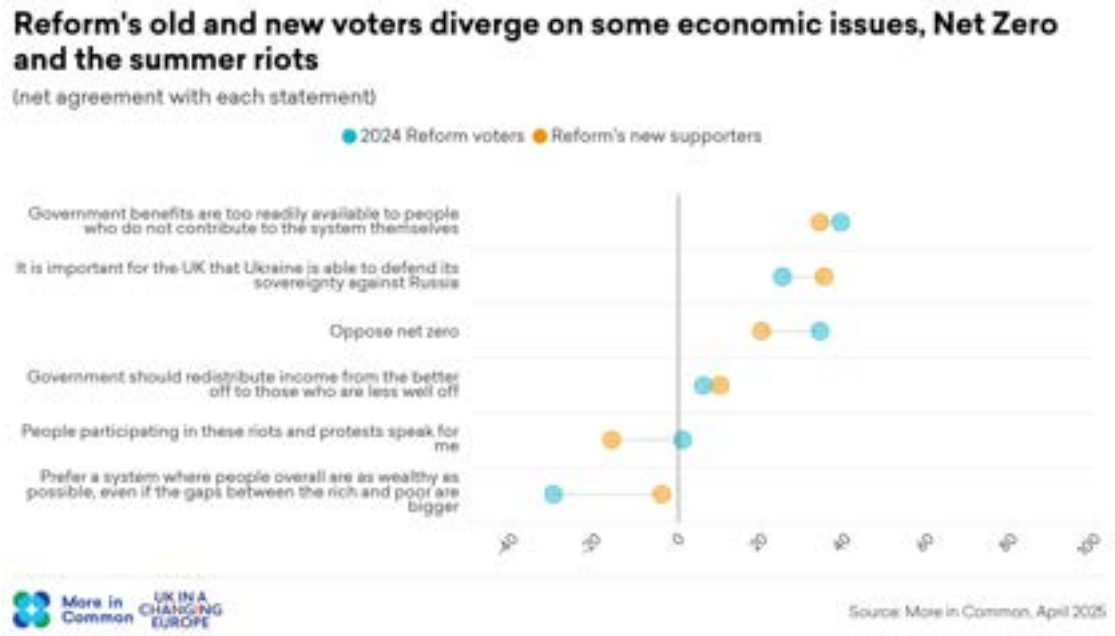


On key issues such as the response to the 2024 summer riots, net zero, and the conflict in Ukraine, these two groups take somewhat different positions. Supporters Reform has gained since the 2024 election are less likely to feel that those who rioted that summer spoke for them, whereas Reform's 2024 base is relatively split on the issue.

When it comes to climate and the environment, while both groups are sceptical of Net Zero, Reform's base holds this view far more strongly: 52 per cent of 2024 Reform voters are opposed to the target, compared to 39 per cent of their new supporters. Additionally, among the party's new supporters, 44 per cent say they would think better of a politician who promised to increase investment in renewable energy, while only 21 per cent say they would think better of a politician who promised to tax renewable energy companies; Reform's proposed tax on renewables is potentially out-of-step with the views of the party's new supporters.

Each group's views on foreign policy, and specifically the war in Ukraine, only further highlights the differences between Reform UK's newer voters and its 2024 base. Overall, Reform 'switchers' tend to be more sympathetic to Ukraine than loyalists (75 per cent versus 60 percent) and less inclined to believe the UK should halt its support for Kyiv (15 versus 27 per cent). Reform's newer supporters are more likely to see Ukraine's sovereignty as a matter of importance for the UK compared to its loyal base (47 to 33 per cent).

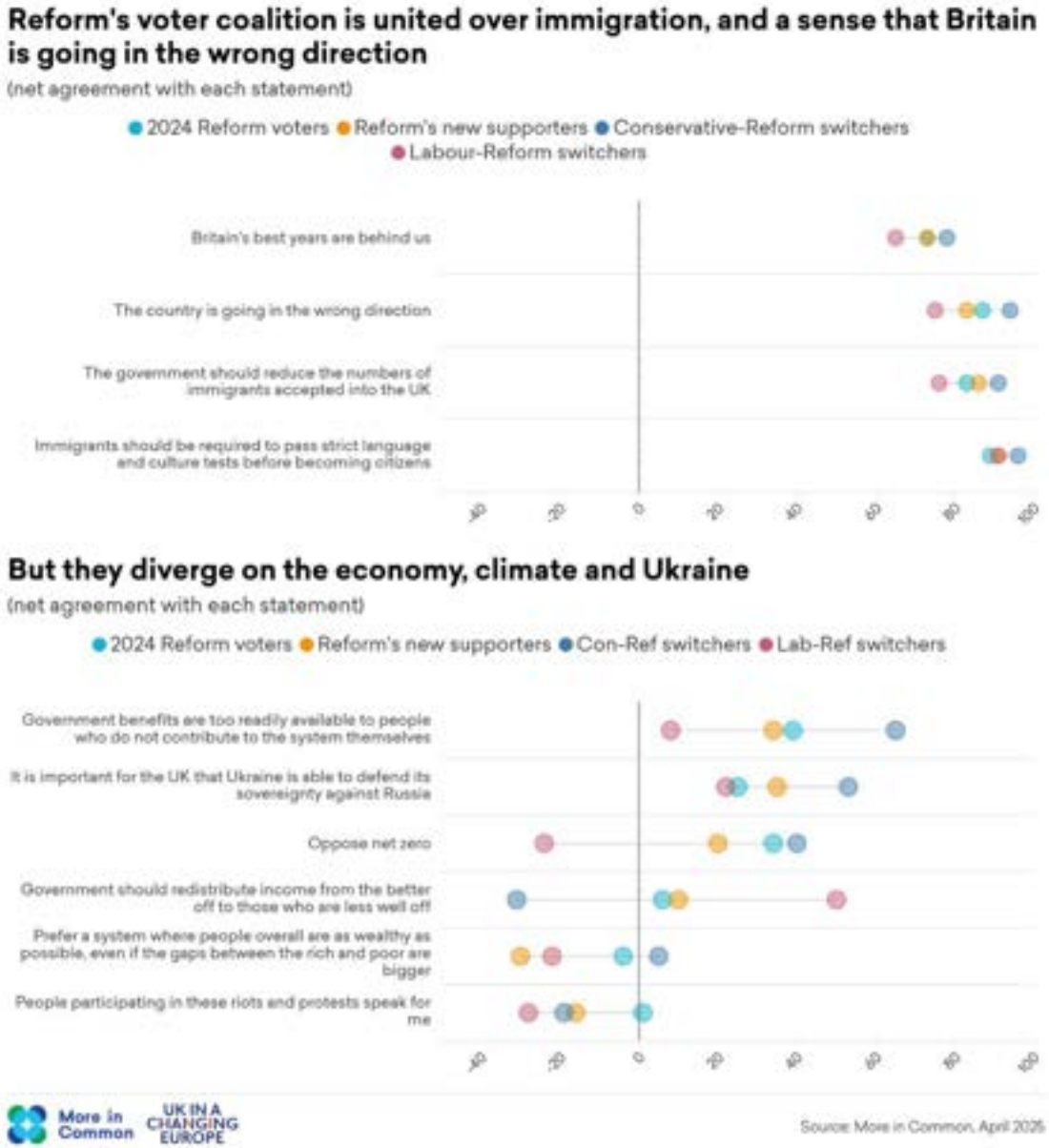
Breaking down Reform voters' economic outlooks shows notable differences between the party's older and newer supporters. The 2024 base leans more toward a low tax, low spend model of government, preferring a system with minimal taxation and lower public spending (68 versus 32 per cent), compared with Reform's new base (61 versus 38 per cent). This difference is mirrored in views on economic fairness. Nearly two thirds of voters Reform has gained since 2024 say they would prefer an economic system that reduces the gap between rich and poor, even if this means everyone is less wealthy, rather than one where people are wealthier overall (34 per cent). The 2024 base is more evenly divided, with 52 per cent prioritising equality and 48 per cent overall prosperity.



These gaps widen further when comparing those who have switched to Reform from Labour or the Conservatives since the General Election.

Like Reform's core base, both groups are united in concerns about immigration and a broader sense that the country is heading in the wrong direction. Both also view Nigel Farage positively, though support is stronger among those moving from the Conservatives (88 per cent) than Labour (77 per cent). But Reform's new voters do not have a straightforward set of policy priorities. Those switching from the Conservatives are far more likely to highlight immigration and asylum as the country's most pressing issues, while those defecting from Labour tend to put the cost of living at the top of their list.

Within Reform's new voter coalition, divisions emerge on the economy, climate policy, and foreign affairs.



On economics, these new Reform supporters vary significantly in both their fundamental starting points, and their specific policy preferences. Labour defectors lean much further to the left: they are nearly three times more likely than Conservative switchers to say the government should redistribute income from the better off to those who are less well-off (66 per cent versus 23 percent), and more likely to feel that there is one rule for the rich and another for the poor (82 per cent versus 56 per cent). Labour switchers are more supportive of the government playing an active role in redistribution, and less likely than Conservative defectors to be concerned about people cheating the benefit system.

Climate change is another dividing line among Reform supporters. Among those who have switched support to Reform since 2024 from the Conservatives, almost 80 per cent say the government should either slow down the transition to net zero or abandon the 2050 target altogether, while only 21 per cent want the government to move more quickly. Yet Labour defectors feel the opposite way- 56 per cent say the government should move more quickly, while 44 per cent want the government to slow down or abandon the target.

On international issues the divisions are more subtle, but still there. Though majorities of both groups back Ukraine, defectors from the Conservatives are more likely to say they sympathise with Ukraine (85 per cent) than defectors from Labour (69 per cent). Conservative-Reform switchers are also seven points more likely than Labour-Reform switchers to believe that Ukraine's defence is 'very important' to the UK.

These internal divisions - both between Reform's old and new supporters, and within that group of new supporters itself - make Reform's job of maintaining its coalition more difficult. While the party has successfully attracted voters from across the political spectrum, the breadth of that coalition could create tensions. The party has to strike a balance between pleasing its loyal base and Conservative defectors who prefer low tax and a focus on immigration, and its newer voters, particularly Labour defectors, who prioritise the cost of living, redistributive policy, and are open to more action on climate.

The non-voters engaged by Reform

Those who didn't vote in 2024 form a significant part of Reform's support base. Currently, around a fifth of those who are likely to vote for Reform at the next election did not vote in the last election - a figure higher than any other party.

Voting is relatively habitual, those who do or don't vote in one election tend to do the same in the next and there is some reason to be sceptical about whether 2024 non-voters will vote for Reform. However, evidence from parties of the populist right on the Continent and Donald Trump's victories in the US suggest they are able to turnout normally disengaged voters. In the May 2025 local elections, Reform supporters were the least likely to say they normally vote in local elections, but the most enthusiastic about voting Reform in that set of elections

However, maintaining the enthusiasm of these supporters will clearly be a key test for Reform. Less than half of 2024 non-voters (43 per cent) say that they would be certain to vote if an election was held tomorrow, compared to two-thirds (66 per cent) of all those who support Reform. Neither Labour nor the Conservatives are likely to win over this group of voters, but they may be deterred from voting if they start to believe, whether because of scandal or broken promises, that Reform is 'just the same' as other parties.

The 'considerers'

Those considering Reform diverge sharply from the party's current supporters, and some have their doubts about Nigel Farage.

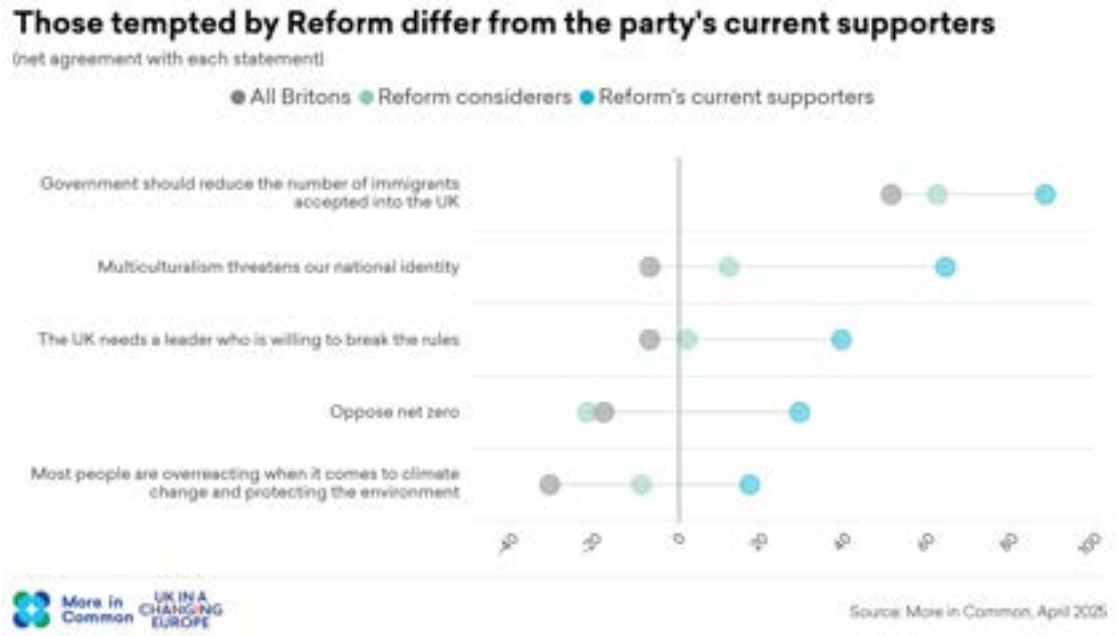
Roughly one-in-five voters (18 per cent) would consider voting for Reform, but are not currently supporting the party. Nigel Farage's path to Downing Street - as well as the fate of the two main parties - depends on what these voters ultimately decide. Reform considerers are ideologically distinct from the party's other supporters, and in some cases out-of-step with Reform's current policy agenda.

As with most Britons, Reform considerers agree that net migration is too high, but they are far less likely to say that multiculturalism threatens our national identity - a view widely held by Reform's current supporters. They also diverge from Reform's existing coalition in their views on democracy, and are far less likely to want a leader who is willing to 'break the rules' in order to get things done.

Reform considerers are particularly divergent from current Reform supporters in their views on climate change: they broadly support the net-zero target and believe that more should be done to protect the environment. This could arise as a problem facing the party if climate-conscious voters are deterred by Reform's hostile stance towards renewable energy.

> *"Not so much worried for me, worried for my grandchildren. I think it was on the news a couple of weeks ago, the ice caps are melting and you just see the polar bears just floating on these lumps of ice and you're thinking, what are we doing to the world? So I think something needs to be done."*
>
> **Karen, admin officer, Billericay, Reform considerer**

> *"So I do think we need to worry about it and not just for us - for our children, grandchildren. I think it's that we need to start putting things in place now for them."*
>
> **Emma, Nurse, Rotherham, Reform considerer**



Reform considerers are particularly divergent from current Reform supporters in their views on climate change: they broadly support the net-zero target and believe that more should be done to protect the environment. This could arise as a problem facing the party if climate-conscious voters are deterred by Reform's hostile stance towards renewable energy.

While those considering Reform are broadly disappointed with the current government, many are also apprehensive about Nigel Farage. Only half (53 per cent) of Reform considerers view Farage positively. It's clear that while Farage is undeniably a central part of Reform's appeal, many still have doubts.

In focus groups, those considering Reform often speak of Farage's appeal, describing the 'head nodding' moments, where they find themselves agreeing with what he says, and admiring his willingness to say it. But there is also a clear lack of trust - and potential Reform voters variously question whether Farage too incendiary, too inexperienced or ultimately will prove to be just the same as other politicians.

> *"I think Farage speaks quite clearly. He has me nodding my head quite a bit. I think it's a breath of fresh air when I hear him speaking sense. I don't agree with everything that he says, but there's more that I do than I don't. And he seems like he's going to do stuff on immigration and all the stuff that we're really thinking about."*
>
> **Matthew, photographer, Dagenham, Reform considerer**

> *"Nigel Farage? No, not a big fan of him. Some things that Reform stand for, yes, but they could definitely use better terminology to put it out there. I do think that sometimes they say things for a strong reaction and to get clicks or people watching them."*
>
> **Ken, operations manager, Aberdare, Reform considerer**

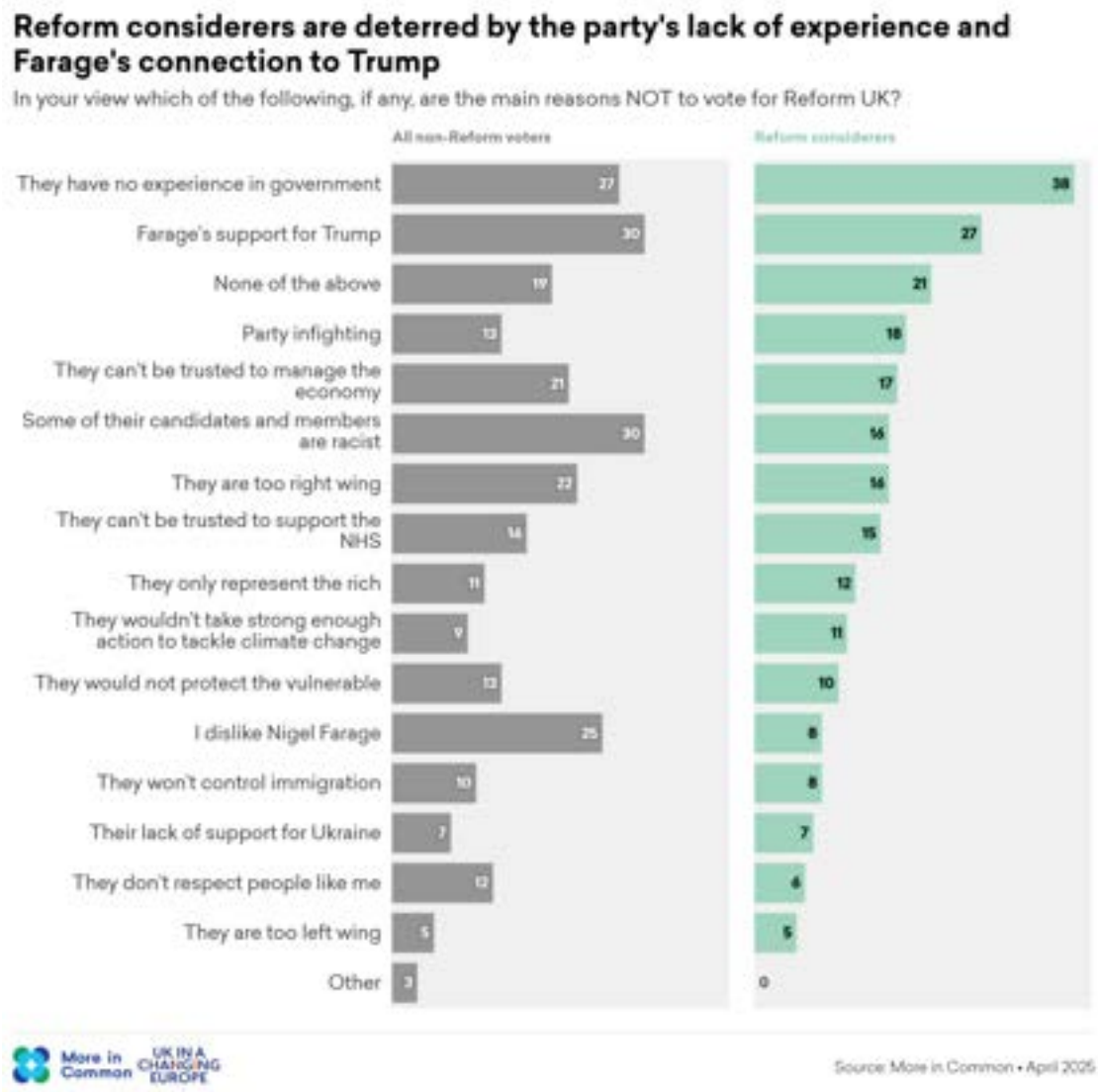
It is a lack of experience in government that deters Reform considerers: 38 per cent say this is a main reason not to vote for Reform. In focus groups, even those who voted Reform in 2024, or plan to now, raise their lack of experience as a concern. Some feel that Reform is not yet ready for government, but that electing them as councillors or MPs would give them an opportunity to prove their competence before the next election.

> *"They don't have experience, and I think you can see that. All the silly infighting - they've just made themselves look fools. I think people will vote for them at the upcoming election, next Thursday, is it? They will vote for them but they're not a realistic prospect as a government, in any shape or form."*
>
> ***Debbie, retired, Scunthorpe, Conservative supporter***

> *"I think I'd be concerned if we had a general election tomorrow. I don't think they're ready. But I like the fact that they have got time and local elections, and I think it would be good for us to see a bunch of Reform candidates getting in locally. (...) If they get their hands on that money, let's see what they do with it."*
>
> ***Carol, bookkeeper, Peterborough, Reform supporter***

A quarter of Reform considerers (27 per cent) are deterred by the Reform leader's support for President Donald Trump. Nigel Farage's relationship with the US president arises consistently in polling and focus groups as one of the public's apprehensions around Reform. While many supporters and considerers admire aspects of Trump's personality, they are put off by the chaos they feel Trump has brought to the US and the world, and particularly appalled by his stance on Ukraine. As such they are concerned by what some regard as Farage's 'cosying up' to him.

> *"(Farage) is just a bit of a loose cannon. Obviously saying he is an ally of Trump's, if he follows suit of how Trump's going with America and does that to the UK, it's just going to cause carnage."*
>
> **Danny, water engineer, Pontefract, Reform considerer**



For Reform to win over this voter group they will need to find a voice on climate change that doesn't alienate the concerned majority of voters; create clear distance from Donald Trump; and demonstrate competence and an ability to 'get things done', both in Parliament and in councils they now control. Other parties on the other hand will be able to deter these considerers by undermining the credibility of Reform's fiscal policies and pledges.

Chapter 3 – Voters' verdict

What do Reform supporters make of Labour's first year in government?

- Reform voters are by far the most negative about Labour's first year in office. Nearly nine in ten say the government is doing a bad job and 62 per cent rate Keir Starmer 0 out of 10. Their main criticisms are Labour's failure to control migration, manage the economy, and protect pensioners and disabled people. The decision to means-test the Winter Fuel Allowance was particularly toxic to Reform supporters' views of the Government, despite the U-turn; in focus groups many describe it as emblematic of a government that punishes those who "play by the rules."

- Labour to Reform switchers are highly critical; alongside immigration, many say they have abandoned Labour due to the government's failure to protect the vulnerable - in some cases citing proposed cuts to disability-related benefits. Most regret voting for Labour in 2024, but some would be open to returning in a future election.

- While Reform supporters also disapprove of the last Conservative government, their criticism is less visceral. Many continue to see the Conservatives as a possible alternative, especially if the party can rebuild credibility on migration, the cost of living and Brexit. Conservative switchers to Reform are notably more open to returning than Labour switchers.

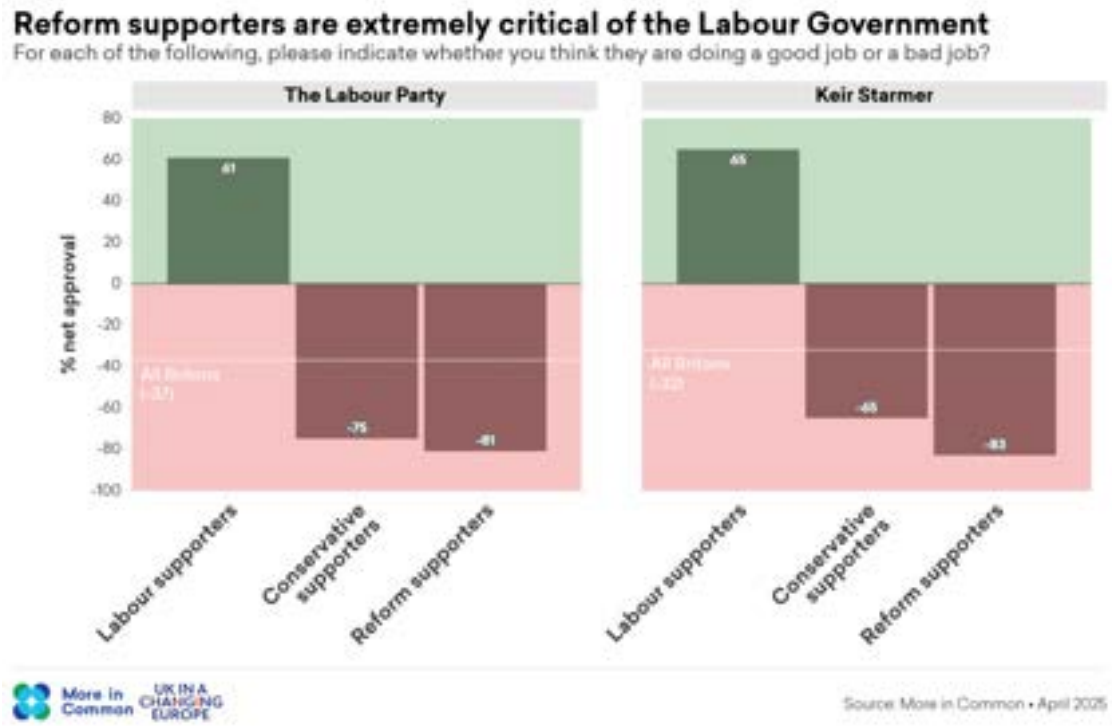
Views on Labour's first year

Those currently intending to vote for Reform UK are by far the most critical of Keir Starmer and his Labour government. Almost 90 per cent of this group say that the Labour Party is doing a bad job in office so far, more than any other group of party supporters, and 30 points more than the public as a whole. 85 per cent of Reform supporters say things are getting worse in this country, with just 4 per cent saying they are getting better.

Those who voted for Labour in July 2024 but have since switched to Reform are slightly less negative, but nearly three quarters (73 per cent) say the Government is doing a bad job.

Reform supporters are also particularly critical of Keir Starmer: 90 per cent say the Prime Minister has done a bad job in office so far, more than any other group of party supporters and 29 points above the national average. Those who did not vote for Reform in 2024 but now intend to - or would consider doing so - are also united by their negative evaluation of Starmer, with 77 per cent unhappy with his performance.

When asked to rate their feelings toward Keir Starmer, where zero is strongly dislike and ten is strongly like, 62 per cent of those intending to vote for Reform give him a zero. 'Reform loyalists', who voted for the party in 2024 and still would, are more negative, with 69 per cent giving the Prime Minister a zero score, while those who voted for Labour in July 2024 but have since switched their allegiance to Reform are less critical (34 per cent select zero).

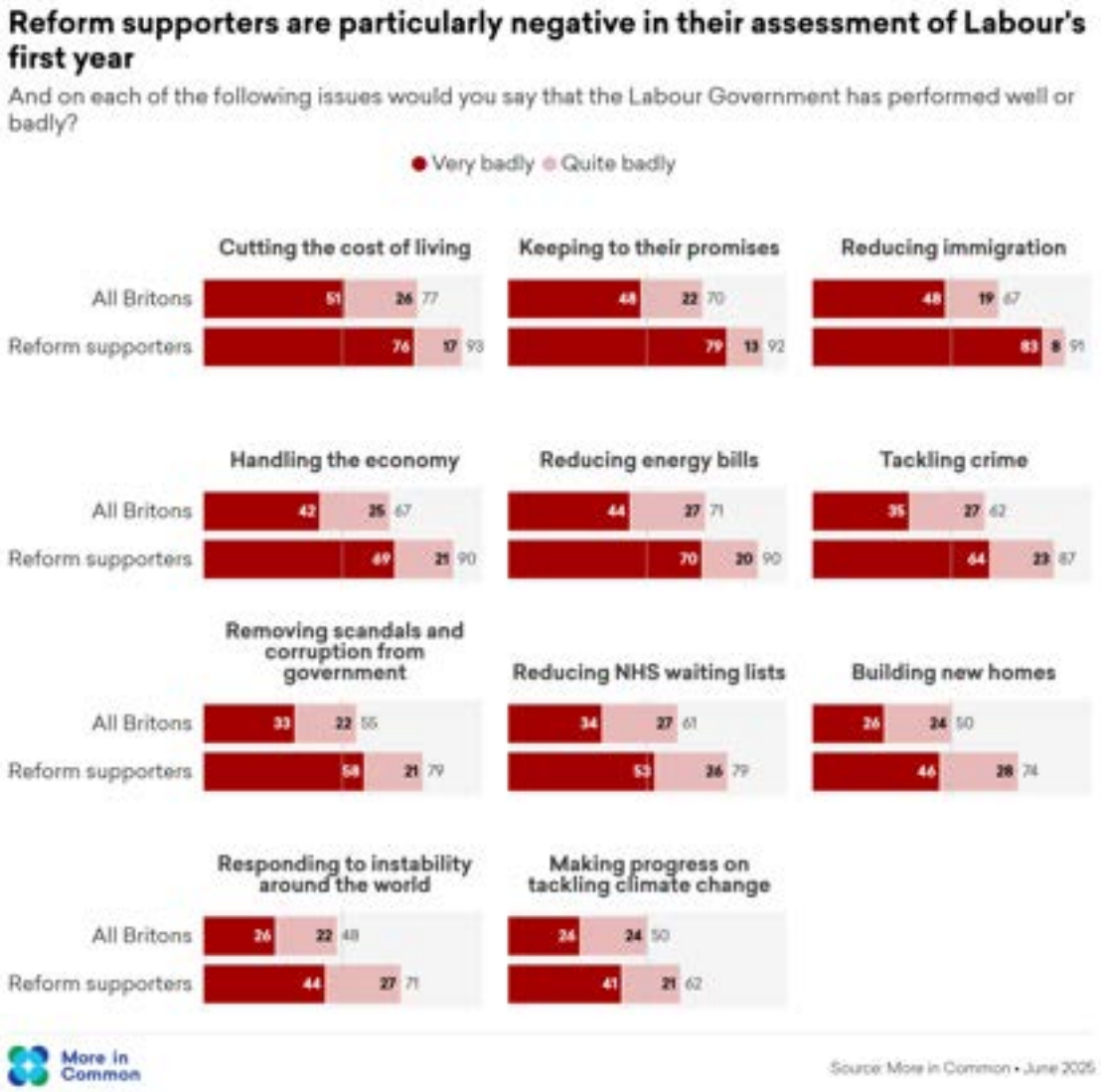


Reform and Green supporters are again united in their discontent with the state of politics. Despite Labour standing on a manifesto titled 'Change', most feel they have seen this delivered: 74 per cent of those intending to vote for Reform and 72 per cent of Green Party supporters feel like this government represents 'more of the same', along with two-thirds (67 per cent) of the wider public. This feeling is particularly strong among those who voted for Labour in 2024 but have since shifted to supporting Reform (82 per cent.

At the same time, 90 per cent of those who would currently vote for Reform say they feel less positive about the future since Labour came to power - more than any other group of party supporters, and 25 points above the GB average.

Reform supporters' negative assessment of the Labour Party reflects their dissatisfaction at what they see as the government's poor progress on fulfilling its manifesto commitments. While the public is generally more likely to say that the government is doing a bad job in most of the policy areas asked about, this feeling is even stronger among Reform supporters. More than nine in ten (92 per cent) of Reform supporters say that the government is doing a bad job at keeping to their promises, compared to two-thirds of the overall public. Similar gaps emerge across a range of benchmarks, from reducing

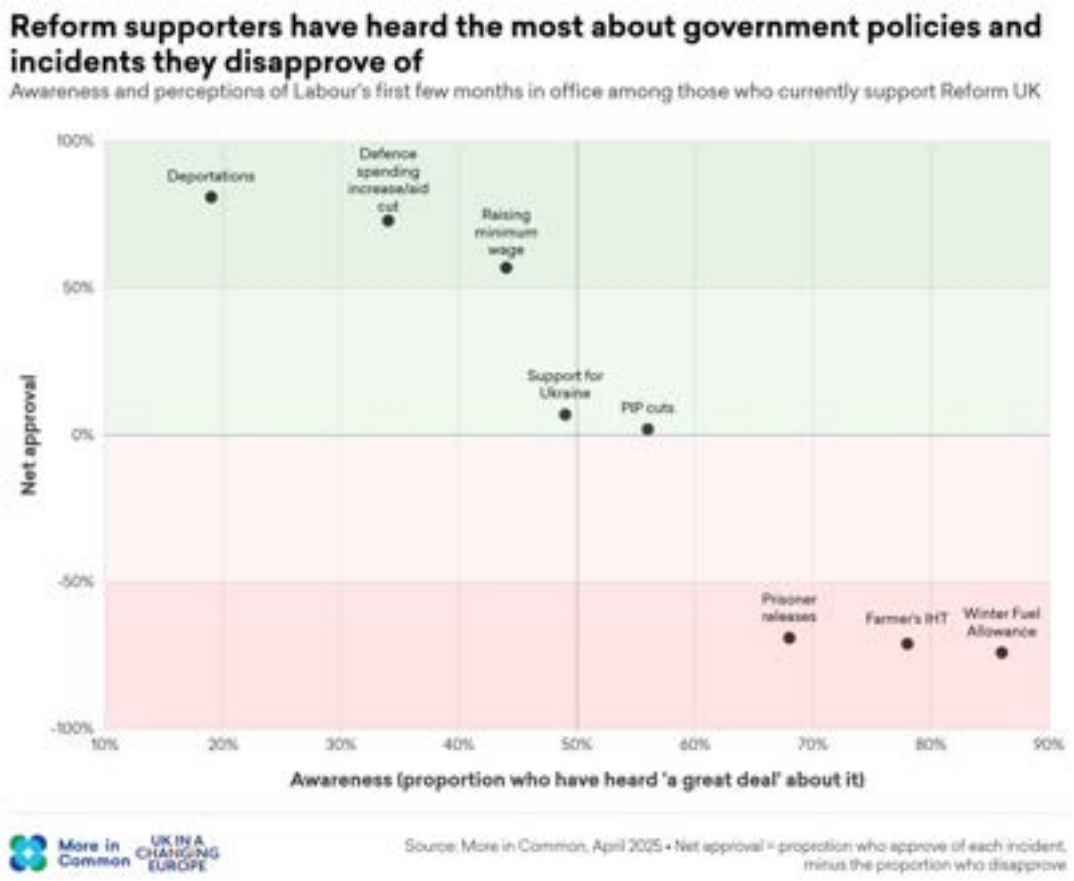
immigration and cutting energy bills, to tackling crime, and removing scandals and corruption from government.



Those planning to vote Reform may do so because they expect the government's poor performance to continue. 87 per cent think immigration into the UK will continue to rise, despite the government's manifesto pledge to cut net migration. 72 per cent believe NHS waiting lists will go up; this is a particular concern among those who have switched from voting Labour to Reform since July 2024.

Reform supporters are far more attuned to Labour's perceived missteps than to its successes. Policies they broadly approve of - such as increased deportations, cuts to foreign aid, and a higher minimum wage - have low cut through among this group. By contrast, unpopular policy moves such as early prisoner releases, changes to farmers' inheritance tax and - above all - the Winter Fuel Allowance have cut through much more strongly. More than four in five Reform supporters have heard about a 'great deal' about the

decision to means-test the Winter Fuel Allowance, compared to less than a fifth who have heard about Labour's high number of deportations.



The government's decision to tighten eligibility for Personal Independence Payments (PIP) divides Reform's support base: 42 per cent approve of the decision, while 40 per cent disapprove. Most Reform voters believe the welfare system is too generous and open to abuse, but many - especially those who have switched to Reform from Labour since 2024 - are concerned that the Government is not doing enough to protect the vulnerable. For them, cuts to PIP sit alongside the Winter Fuel Allowance as a failure to support those in need.

The Winter Fuel Allowance

The government's initial decision to cut the Winter Fuel Allowance is both the most high-profile and the most unpopular decision since the election among both the general public and Reform supporters. While 69 per cent of the public has heard a great deal about this decision, this figure increases to 86 per cent among Reform supporters. While 68 per cent of Britons disapprove of that policy, 84 per cent of Reform supporters do, including 69 per cent who strongly disapprove. Of all of the policies tested, this is also the one that those who have switched from Labour to Reform since the election disapprove of most.

Reform supporters are also, however, even sceptical of the government's U-turn and decision to widen the eligibility criteria for the winter fuel payment. They are the voter group most strongly opposed to means testing the fuel allowance and they are also less likely to support the new threshold of £35,000, suggesting they do not believe that even the government's amended criteria will be fair.

As with the wider public, the early decision to mean-test the Winter Fuel Allowance has become a defining moment for Reform voters of the first year of this Labour government, and is likely to continue shaping their view of the government, regardless of how the policy now unfolds.

For many Reform supporters, the decision jarred with their principles of fairness and reward that underpin their view of the economy. In focus groups, they describe it as a sign that the government lacks respect for pensioners. Restricting the Winter Fuel Allowance fed Reform voters' broader zero-sum view of public spending: that support for pensioners is being withdrawn while the government continues to spend on asylum hotels and universal credit, spending on people who they feel haven't paid into the system. Rather than seeing this as an isolated cut, many view it as part of a pattern in which the government punishes those who do their bit, do the right thing and play by the rules.

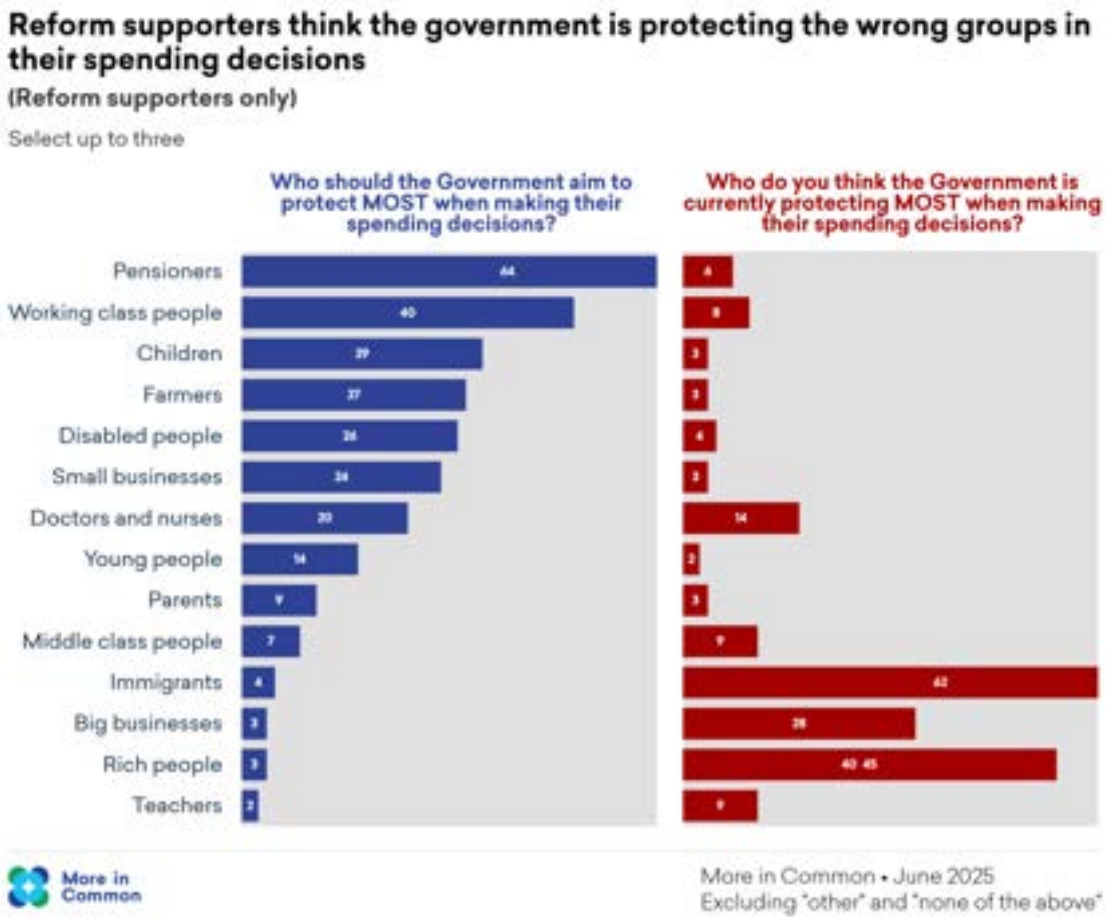
> *"Yeah, I've also voted Reform yesterday and pleased I think that they got in. I'm totally disillusioned with Labour, totally disillusioned. The first thing that they did was to take the Winter Fuel Allowance away from the pensioners and then it's just all gone downhill."*
>
> **Michelle, retired, Runcorn, Reform voter**
> **(switched from Labour in the Runcorn and Hellsby by-election)**

> *"I think that's what we thought would happen when Labour got in. We've always been told that Conservative governments just make the rich richer, and that labour champions the working class. I think actually they haven't championed the working class. And I think that there hasn't been, to my knowledge, any kind of significant change. People are still struggling to pay their bills. They've taken the winter fuel allowance, things like that."*
>
> **Rose, retail manager, Billericay, Reform considerer**

> *"And it all comes round to this. Immigrants again. That's where the money's going. What we was entitled to - they took it off us to accommodate them."*
>
> **Janet, retired, Beverley, Reform supporter**

Sixty-three per cent of those who say they would vote Reform, including over half of those who have moved to support the party from Labour, say that pensioners are benefitting the least under this government, the highest of any voter group.

In fact Reform supporters are more generally concerned that vulnerable groups are benefiting least from the policies of the current government. Along with pensioners, working class people, disabled people and those on low incomes are thought to be those most disadvantaged over the past year. A third of those who have switched from Labour to Reform since the election say the party's failure to protect the vulnerable is one of the main reasons to not vote Labour.



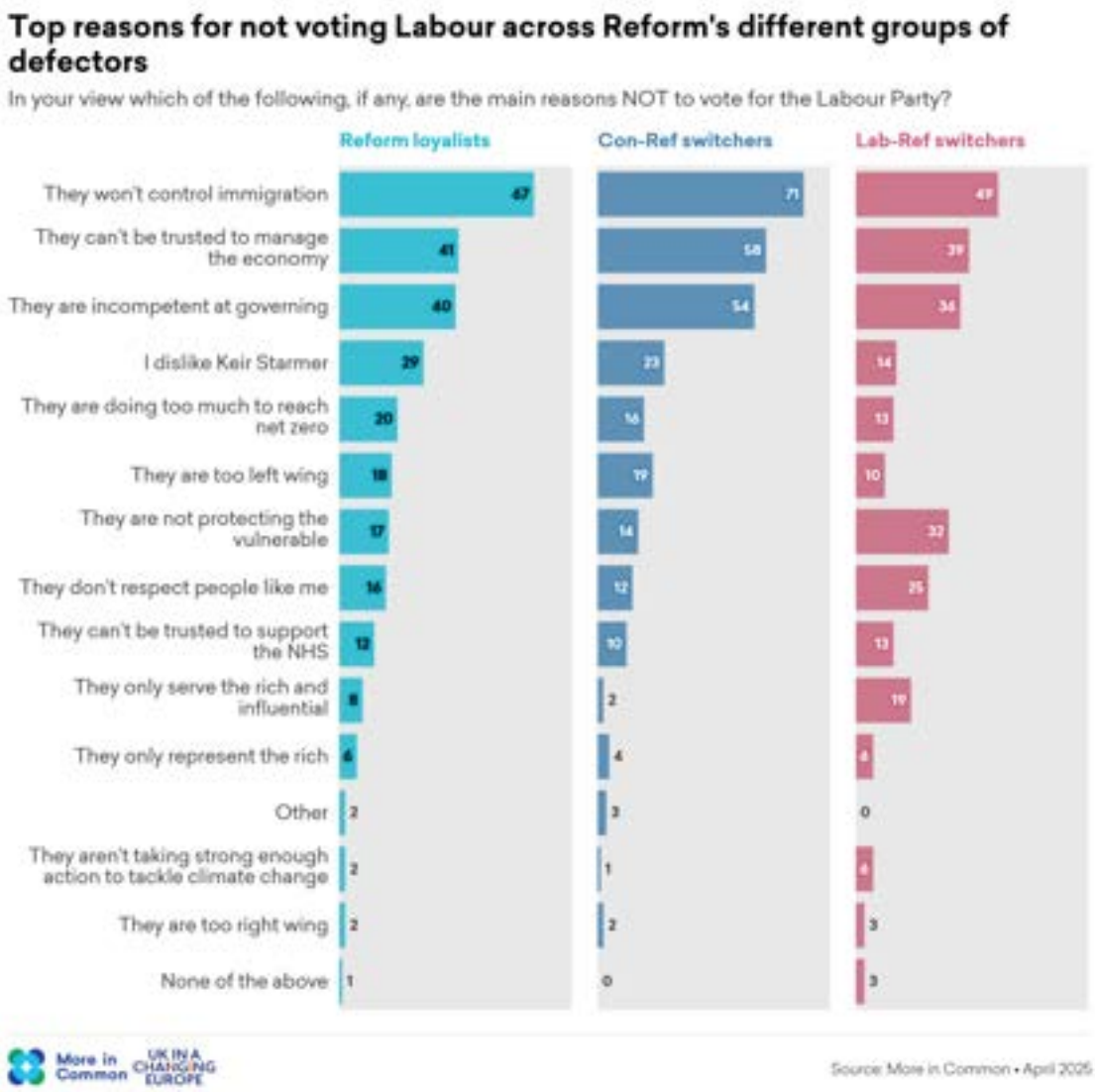
The electoral consequences for Labour

There is a sense of 'buyers' remorse' among some 2024 Labour voters. 83 per cent of those who voted Labour in July 2024 and now say they would vote for Reform say they regret voting for the party at that election. Just 11 per cent say it is likely they will vote Labour at the next election. 38 per cent say they would now vote against Labour given the chance.

Among Reform supporters, the biggest reason not to vote for Labour is a sense that the government is not able to control migration (63 per cent), not trusting them to manage the economy (45 per cent) and that the party is 'incompetent at governing' (42 per cent) and a dislike of Keir Starmer (27 per cent). The smaller group of Reform supporters who have

switched from Labour since the election are much more likely to focus on the party's failure to protect the vulnerable (32 per cent), alongside perceived failures on economic management and migration.

Taken together, it seems that unlike core Reform 2024 supporters, those who have switched from Labour since July of last year have done so less because of the party brand, and more because of the government's perceived failure to deliver in specific policy areas.



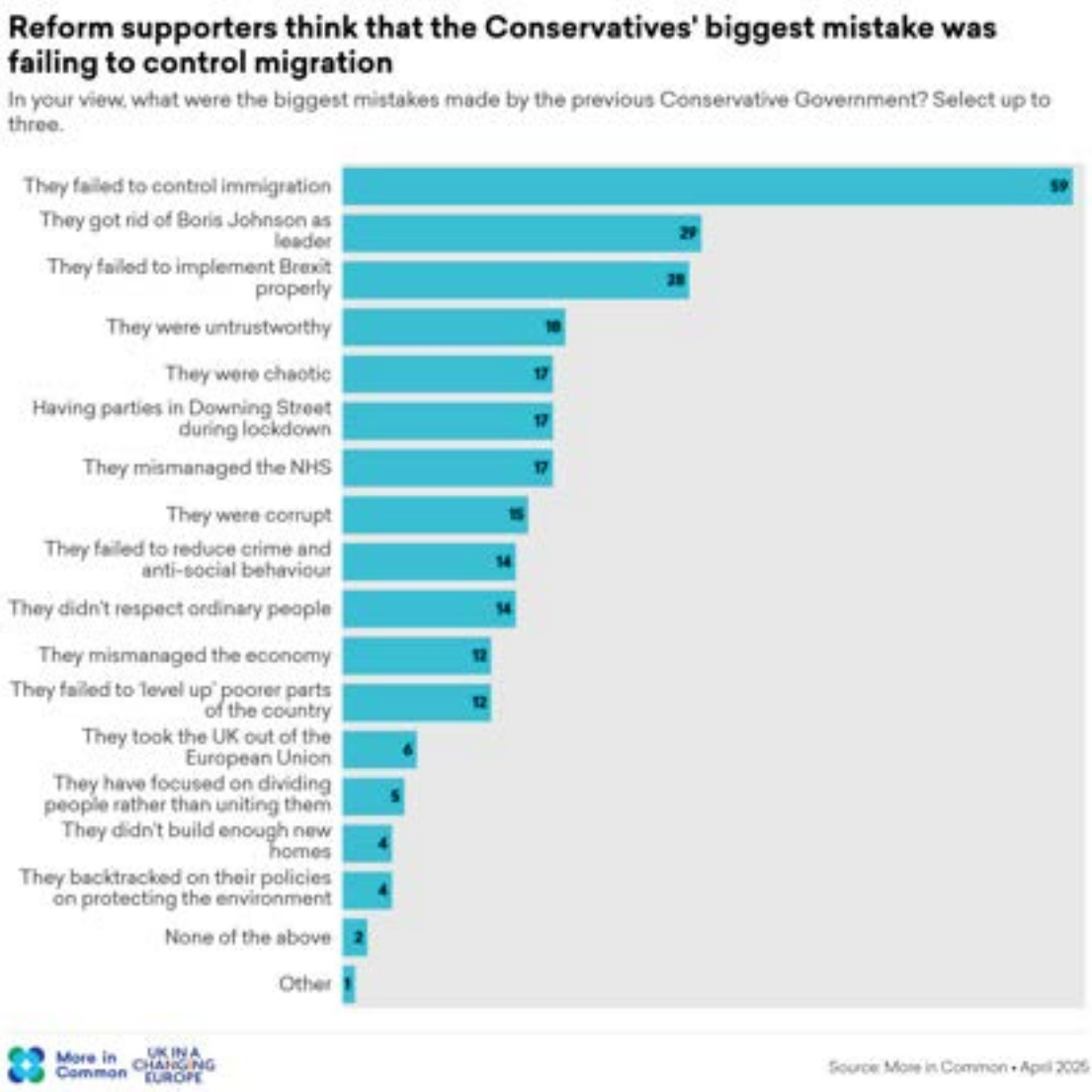
The legacy of the Conservative Party

Given their previous history of voting for the Conservatives, many Reform supporters are more sympathetic toward the party than they are to Labour. Reform supporters are far more likely to rule out voting for Labour (75 per cent) than to rule out voting Conservative (29 per cent).

Reform supporters are also less negative about the last Conservative government's record than voters of other parties, though more still disapprove of the Conservative's record in key policy areas than approve.

However, those who voted for the Conservatives in 2024 and have since switched to Reform view the Conservative Government's record in each of these policy areas more positively. The cost of living is the only area where Conservative-Reform switchers are more negative than positive about the last government's legacy.

When asked about the last Conservative government's biggest mistakes, Reform supporters overwhelmingly opt for 'its failure to control migration'- almost six in ten think this was the Conservative's biggest failure. Just under a third also see the failure to properly implement Brexit as a mistake. 71 per cent of Reform supporters voted to leave the EU in 2016.



However, there is also strong nostalgia for the Johnson premiership. A not insignificant group of Reform supporters (29 per cent) say the decision to oust Boris Johnson was one of the last government's worst mistakes. That figure rises to almost half (46 per cent) among those who have abandoned the Conservatives for Reform since the 2024 election.

Those who have deserted the Conservative Party for Reform since July 2024 are less likely to regret their vote for the Conservatives at that election than those who have switched from Labour. Among those who voted for the Conservatives and would now vote for Reform, just 20 per cent regret their vote. Just 2 per cent say, if given the option, they would vote against the Conservatives.

This suggests that, among current Reform supporters, public opinion against the Conservatives has not hardened as much as it has for Labour. It's far from certain, then, that the Conservative Party has forever lost its former voters to Reform. Instead, many of those who have switched to Reform from both the Conservatives and Labour have done so because they are looking for the party best placed to channel their anger toward the government. For now, Reform looks like that vehicle, but these voters are open to being wooed back to the Conservatives - if the party looks like a credible Government in waiting again.

A key sticking point, however, is that Reform supporters are not as positive toward the Conservative leadership. 51 per cent of Reform supporters believe that the Conservative Party is not doing a good job in Opposition. Party leader Kemi Badenoch also has a negative approval rating of -31, albeit far higher than their approval of Keir Starmer (-81).

4 – Looking forward

- **For Labour:** Labour faces a challenge with Reform supporters: fewer than 5 per cent of Reform loyalists are open to voting Labour. However, 2024 Labour voters who have since defected to Reform are more open to returning to the fold if Labour delivers on the cost of living, the NHS, and migration. Retreating from climate action, or taking a harder stance on benefits, might align with the views of Reform's core base, but would be unlikely to appeal to the defectors that Labour can actually reach, and would undoubtedly alienate their progressive flank.

- **For the Conservatives:** Reform supporters remain more open to the Conservatives than to Labour: only 29 per cent rule out voting Conservative. Many Conservative to Reform switchers have done so tactically, backing what they see as the best challenge to Labour. Switchers could return to the Conservatives if it looks competitive and restores credibility on immigration and economic management. The Conservatives' best path to re-engage this group is likely to be in appealing to their 'small c conservative' instincts: Farage's closeness to Donald Trump, his ambiguity on Ukraine, and a lack of experience in government are all factors that create hesitancy about voting Reform. However, for this appeal to work the Conservatives must pass a viability test: criticisms of other parties will only resonate if paired with a clear and credible alternative.

- **For Reform:** If Reform is to maintain its support and build a broad coalition, it must avoid becoming a single-issue immigration party. Widening its policy agenda to include the cost of living, the NHS, and economic fairness is essential, as is demonstrating competence both in Parliament and the local councils the party now controls. It must also reassure 'considerers' by adopting a more moderate tone, and avoid mistaking the views of its highly engaged online base for those of the wider public. Reform's growth into a mainstream party will depend on avoiding divisive rhetoric, tackling racism in its ranks, and positioning itself as a serious, credible force rather than a protest movement.

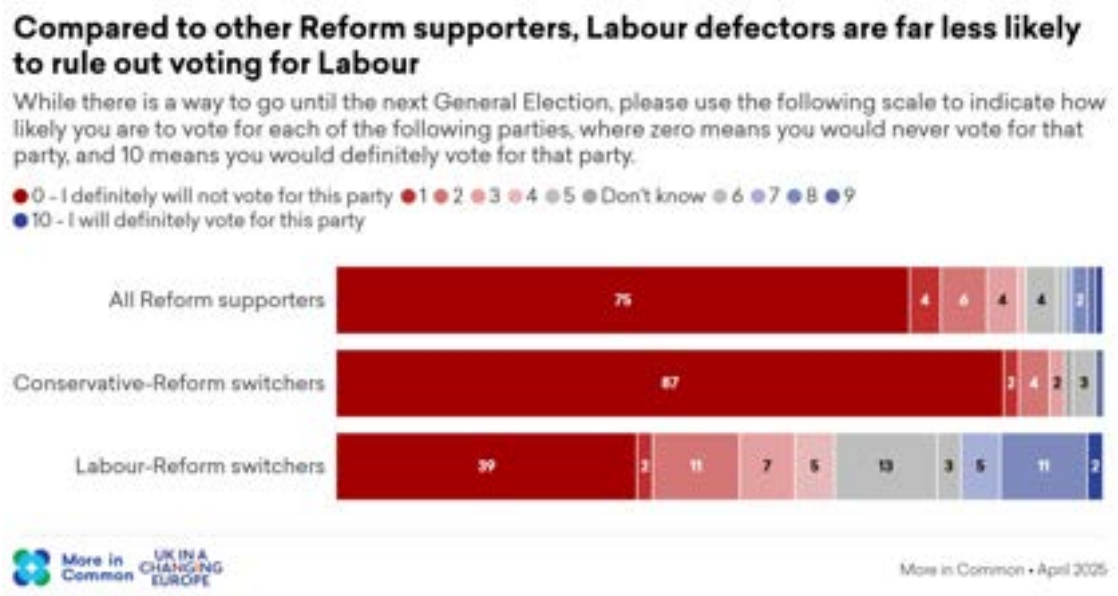
For Labour

Labour faces a difficult task in winning over those currently supporting Reform. This group of voters is highly negative about Labour and its record in government so far. Reform voters are particularly unhappy about decisions such as means testing Winter Fuel Payments and changes to farm inheritance tax.

This should not come as a surprise: 90 per cent or more of Reform loyalists say that Labour is doing a bad job in government, and that they expect immigration, energy bills, and taxes to increase over the next few years. When asked their main reasons to not vote Labour,

most of this group say that the Government cannot control immigration (67 per cent), and many say they cannot manage the economy (41 per cent).

Those who voted Labour in 2024 but have since switched to Reform are more open to voting for Labour again than other Reform supporters. 17 per cent of Labour-Reform switchers say that Labour would be their second choice, compared to 4 per cent of all Reform supporters. Less than two in five Labour to Reform switchers rule out voting of the party, compared to three quarters of all Reform supporters. Understanding the priorities of these switchers, and why they have turned away from the Labour Party, will be crucial if Labour hopes to regain their trust.



Labour to Reform switchers share some of the Reform loyalists' assessments of the Government. A majority of this group also believes that Keir Starmer and his party are doing a bad job. They also believe that immigration levels, taxes, and energy bills will increase in the coming years.

However, they are generally less negative in their assessment of Labour's record in government so far. For example, 49 per cent disapprove of Labour's job on supporting the NHS, compared to 60 per cent of Reform loyalists; 64 per cent disapprove of their handling of the cost of living, compared to 83 per cent of Reform loyalists.

A key difference between the two groups is *why* they disapprove of Labour. Asked for their top reasons not to vote for Labour, Reform loyalists - and those who have switched from the Conservatives - overwhelmingly cite failures to control migration above other reasons. While this is also the top single reason for those who have switched from Labour, these voters are less likely to select it (49 per cent, compared to 67 per cent of Reform loyalists), and far more likely than other supporters to cite failures to protect the vulnerable (32 per cent), a perceived lack of respect (25 per cent), and the perception that Labour only serves the rich and influential (19 per cent).

> *"PIP being reduced, universal credit being reduced, child benefit being reduced, winter fuel being taken off pensioners, all of those things I wouldn't imagine a Labour party would be supporting (…) we seem to be taking money from the very poorest in society and that's not the Labour Party that I liked and would support. I think they've lost the direction."*
>
> **Mark, retired, Burnley, Labour to Reform switcher**

For Labour to rebuild trust with its defectors, it will have to engage with the values and priorities of those who have switched their support and avoid viewing Reform UK supporters as a homogenous group. Roughly half of Reform loyalists belong to the Dissenting Disruptor segment; these voters form Reform's core base, and will be extremely difficult for Labour to win over. They have by far the highest approval of Nigel Farage and (along with Traditional Conservatives) the lowest approval of Keir Starmer. What's more, the measures and policy prescriptions that would be needed to win over these voters would undoubtedly alienate far more voters on Labour's left flank, costing them votes to the Liberal Democrats, Greens, and the new Corbyn-led party on the Left.

Additionally, half of Labour's current supporters (48 per cent) say that Reform UK's policies on immigration are too strict. While Labour's supporters want to see competent delivery in controlling migration, many could be repelled by simply mirroring Reform's rhetoric and policies on this issue. In short, trying to 'out-Reform' Reform to win over 2024 Reform voters is unlikely to be successful, and could undermine Labour's remaining base.

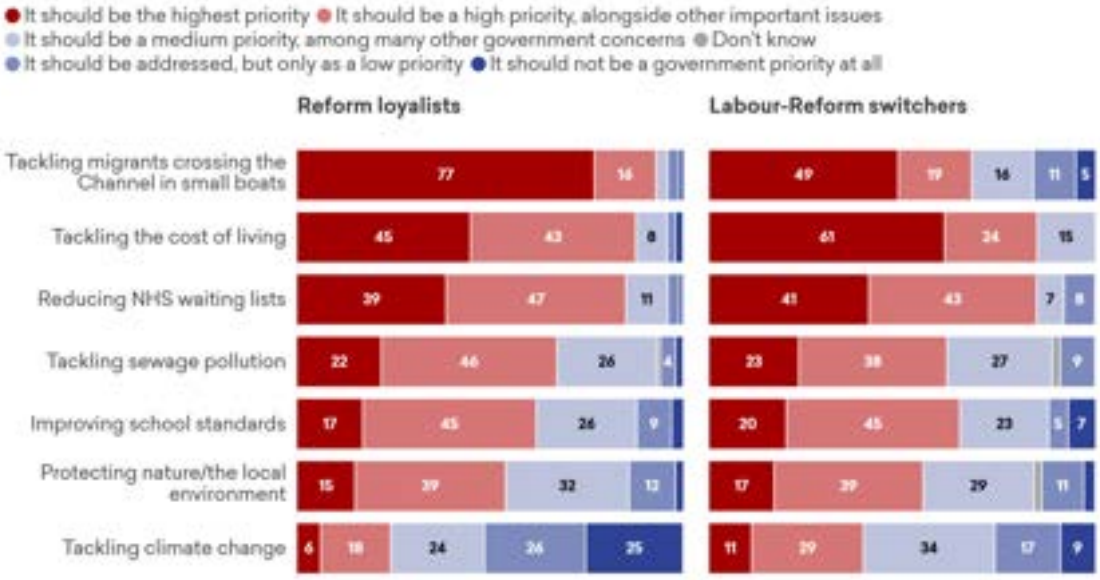
While Reform's base is dominated by Dissenting Disruptors, Labour to Reform switchers are more diverse in their segment breakdown: they are nearly as likely to be Rooted Patriots (29 per cent) as Dissenting Disruptors (32 per cent). Additionally, a not insignificant proportion of Labour to Reform switchers belong to the Incrementalist Left segment, perhaps suggesting Reform may be beginning to reach more moderate, left-leaning and risk-averse voters (although Reform UK's vote share remains low among this segment, usually ranking in fourth place behind Labour, the Liberal Democrats and the Conservatives).

Rooted Patriots were an important part of Labour's 2024 support base; their swing toward Labour helped to reverse the Conservatives' 2019 gains in Red Wall constituencies. Dissenting Disruptors, on the other hand, tended to vote for Reform in the General Election.

While the two segments share many views on immigration and diversity, they diverge in key areas.

Reform loyalists think Channel crossings should be the government's highest priority; Labour-Reform switchers think it should be a priority *alongside* other issues

To what extent do you think the UK government should or should not prioritise the following?

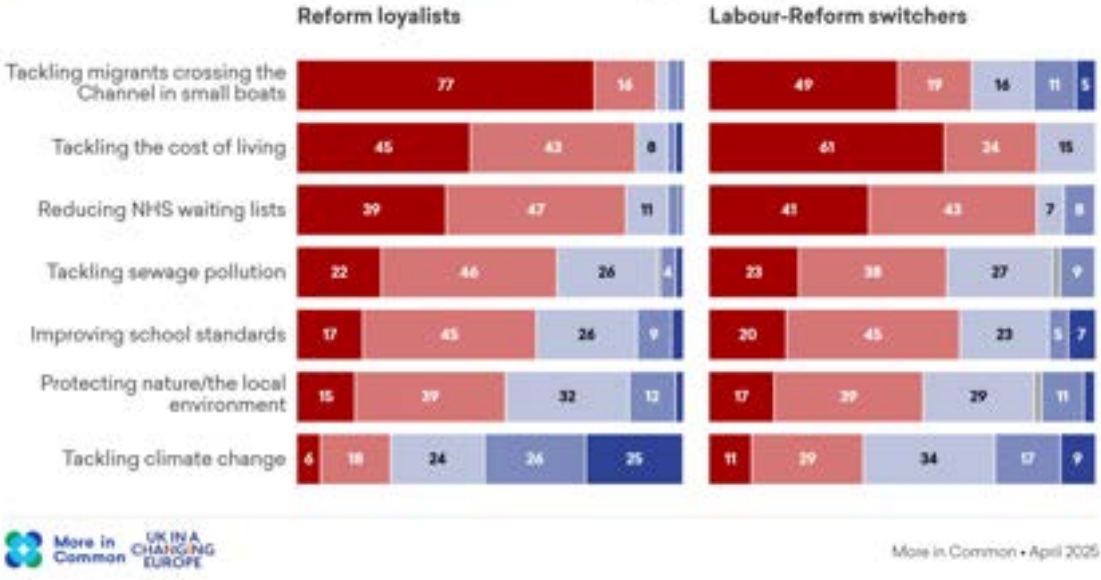


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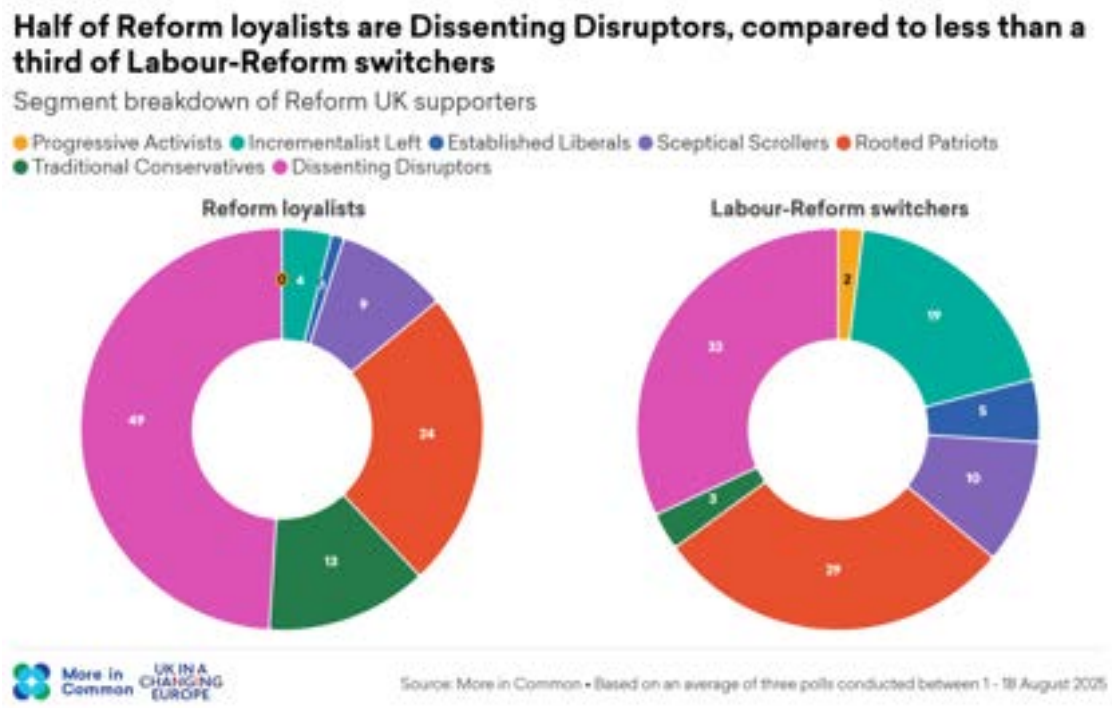
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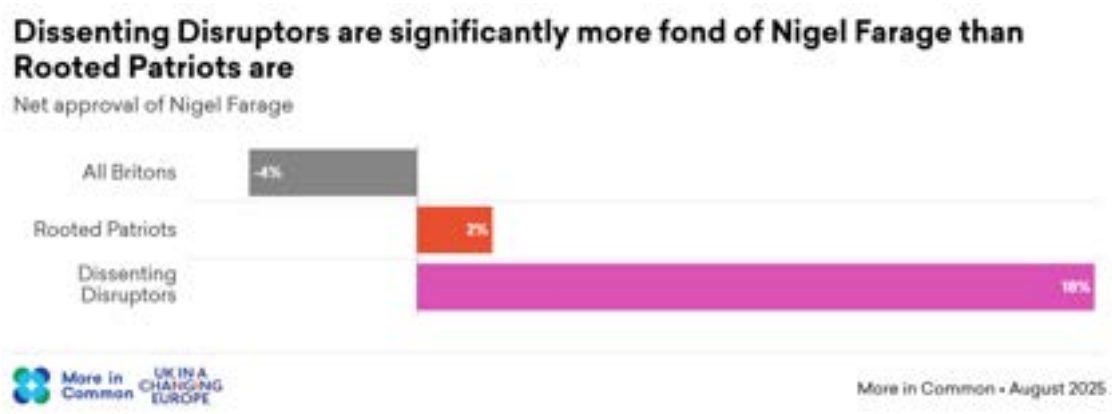
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Dissenting Disruptors want to see radical change and have a higher tolerance for risk and chaos, while Rooted Patriots are more cautious: they prefer gradual, incremental progress and value stability. Demonstrating competent delivery on key policy areas will be crucial to winning back Rooted Patriots.

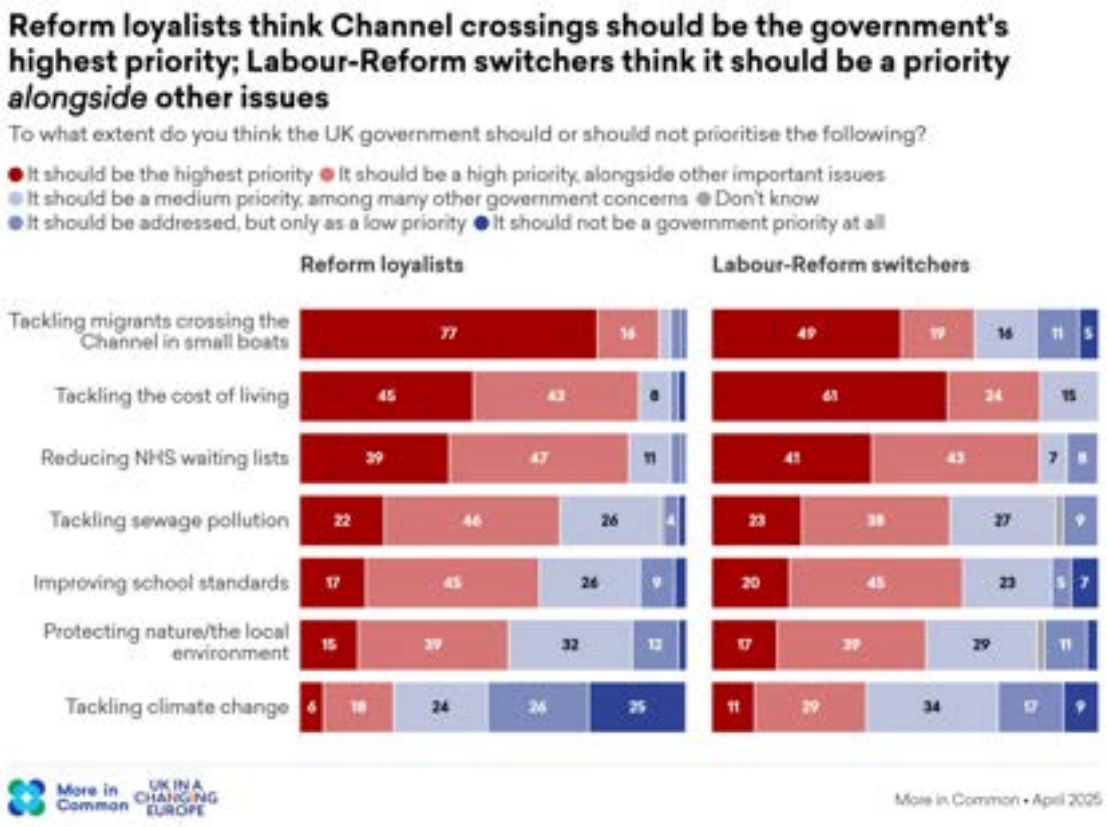
While the two segments share concerns about immigration, the issue is more salient for Dissenting Disruptors. Meanwhile, Rooted Patriots are significantly more likely to see the NHS as a key issue, and slightly more likely to prioritise the cost of living and social care for the elderly. A clear and strong prioritisation on tackling the cost of living, coupled with some tangible improvements in NHS waiting lists, holds potential for regaining the confidence of Rooted Patriots.



This speaks to a broader split in Reform's coalition that Labour will need to take into account. While Reform loyalists and Labour-Reform switchers share many of the same priorities - the NHS, the cost of living, improving school standards - the fundamental difference between them is the emphasis they place on migration.

While 72 per cent of Reform supporters say that tackling Channel crossings should be the highest priority for the Government, the equivalent figure for Labour-Reform switchers is 49 per cent. While the issue is still important to many of those who would not currently vote Labour, this group is more likely to say that migration should be a priority alongside other issues for this Government.

Therefore, the Government will struggle to re-engage Labour to Reform switchers without making progress on tackling Channel crossings and lowering migration. But for this group, migration is just one of a series of issues they want to see the Government perform better on, including protecting the vulnerable and improving public services.



Alongside winning back those who have already defected, Labour may need to avoid taking its remaining supporters for granted. 17 per cent of those who currently support Labour would consider voting for Reform UK.

Labour supporters have a range of misgivings that deter them from voting for Reform UK. The most common is a sense that Reform does not represent their values (41 per cent), followed by the view that it is too right-wing (32 per cent). Since many of Reform's newer

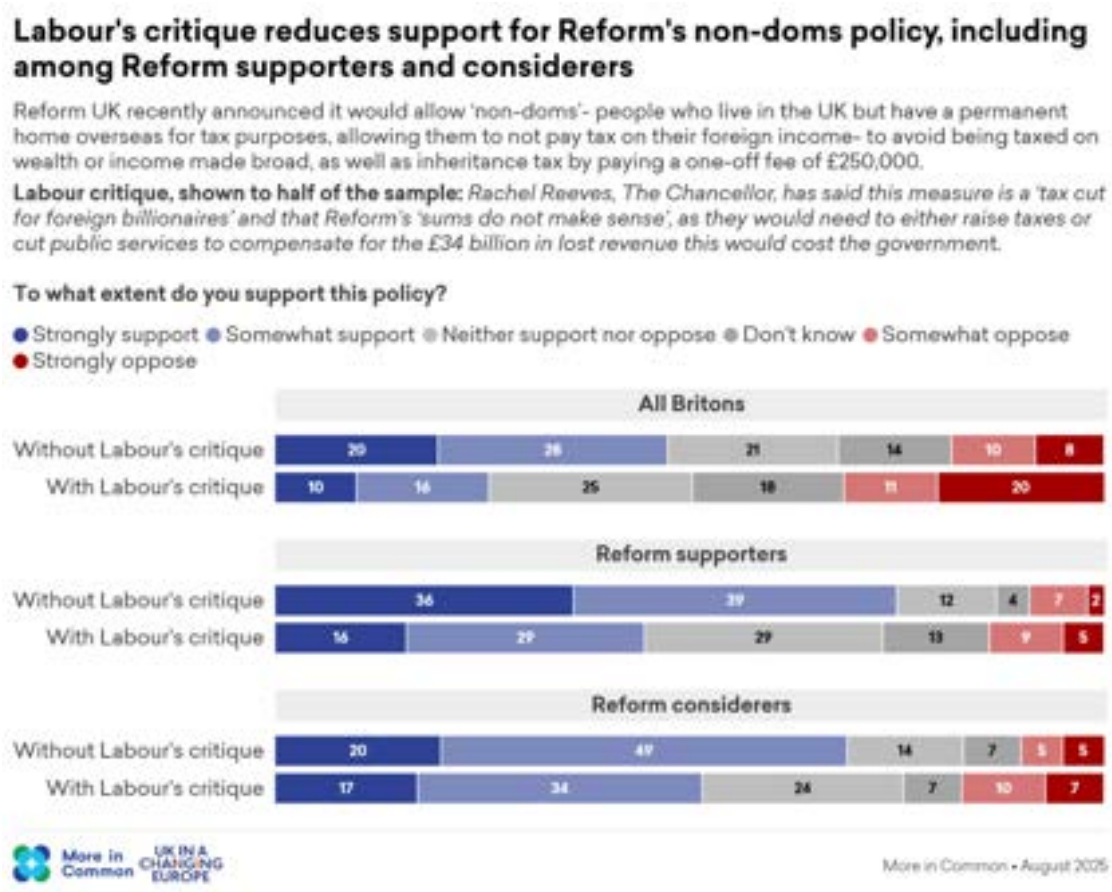
recruits - especially those from Labour - are more economically left-wing on issues like welfare and redistribution, delivering a fairer economy that makes daily life more affordable while protecting the vulnerable may be key to cementing Labour's current support and winning back voters lost to Reform.

Additionally, half of Labour's current supporters (48 per cent) say that Reform UK's policies on immigration are too strict. While Labour's supporters want to see competent delivery in controlling migration, many could be repelled by simply mirroring Reform's rhetoric and policies on this issue. The measures and policy prescriptions that would be needed to win over Reform's core voters would undoubtedly alienate far more voters on Labour's left flank, costing them votes to the Liberal Democrats, Greens, and the new Corbyn-led party on the Left. In short, trying to 'out-Reform' Reform to win over 2024 Reform voters is unlikely to be successful, and could undermine Labour's remaining base.

Given that Reform's lack of experience is a key barrier for many voters, Labour has an opportunity to contrast and demonstrate its professionalism and delivery in government. Testing of recent policy announcements found that Labour's rebuttals reduced support for policies among Reform voters and the wider public. For example, asked about Reform's Britannia Card policy on non-doms, 75 per cent of Reform UK supporters were in favour. When caveated with Rachel Reeves' criticism that this would be a tax cut for foreign billionaires and that Reform's sums do not make sense, that number dropped to 46 per cent. It also decreased support among those considering Reform by 19 points.

When testing Farage's recent announcement that Reform will introduce £80 bn of new spending with funding coming from cutting Net Zero, 35 per cent of Reform supporters said this announcement made them more likely to vote Reform. However, when respondents were shown criticism from Labour that Farage's plans have not been costed - and would lead to cuts in services or sizable tax increases - that number dropped to 20 per cent.

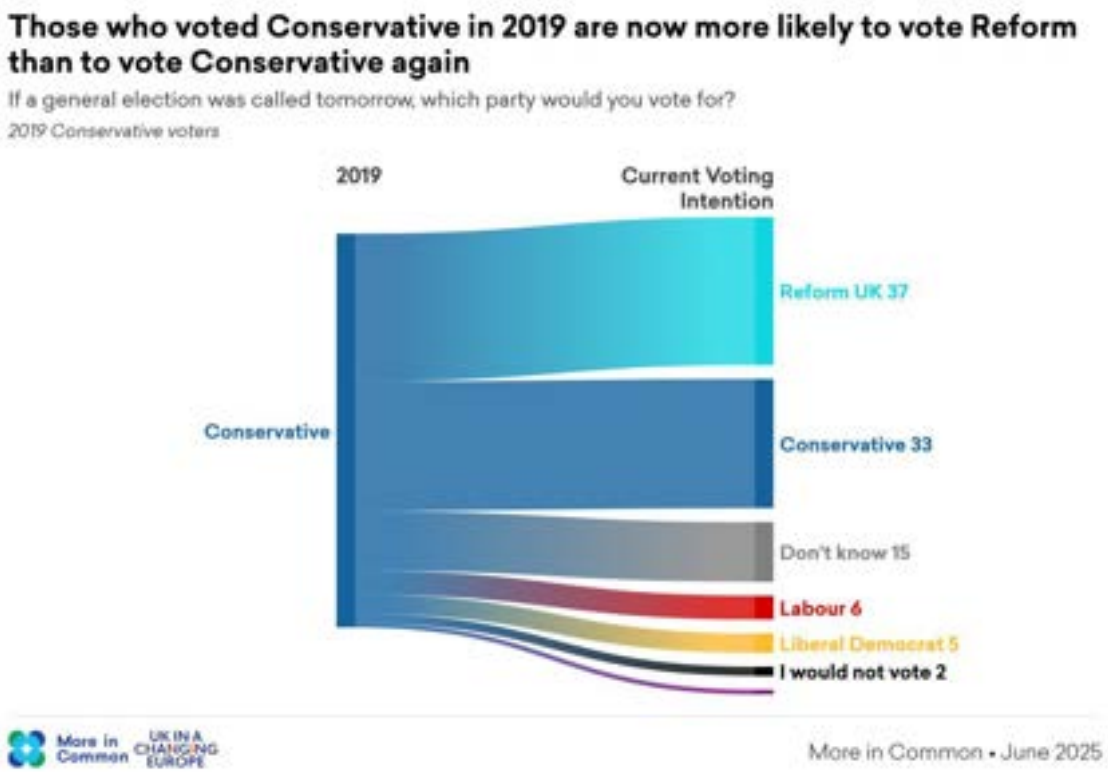
Even among Reform's supporters, there are doubts about the party's credibility and competence. Labour can rebuild support with switchers who have left the party since the election, but only if their criticisms of their opposition are matched by credible delivery on the part of the Government.



For the Conservatives

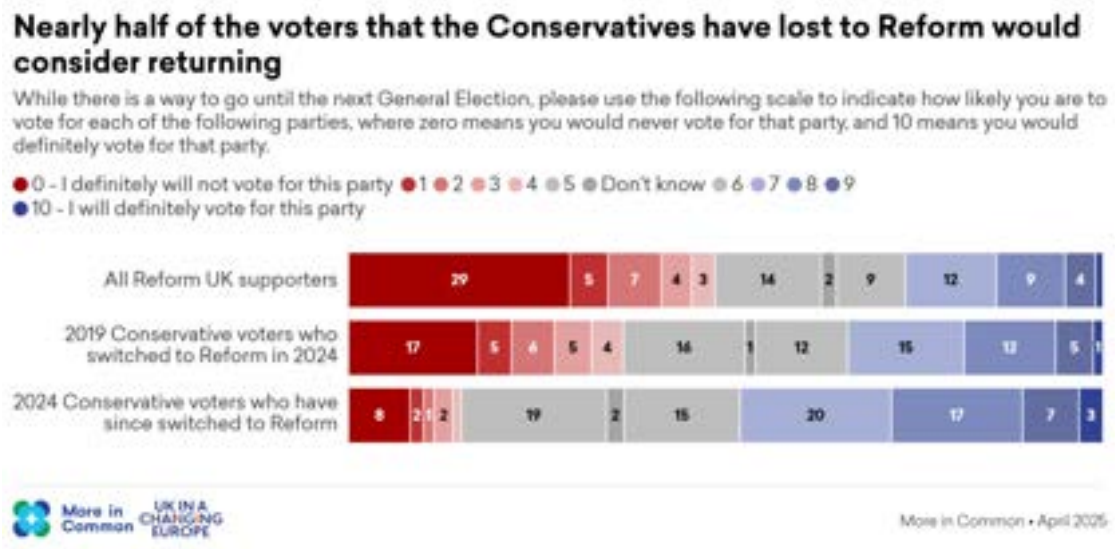
Reform UK could pose an existential threat to the Conservative Party, having taken around 17 per cent of their 2019 voters in the 2024 election, and a further quarter (24 per cent) over the past year. In fact, those who voted for Boris Johnson's Conservative Party in 2019 are now more likely to vote for Reform than for the Conservatives.

However, the 'battle for the right' is not over: former Conservative voters have not written off returning to the fold. At the moment, many erstwhile Conservatives see Reform as their best chance of defeating Labour and delivering a right-wing government. Above all else, the Conservative Party will need to pass a viability test to win back defectors.



Reform supporters still view the Conservatives more positively than Labour, and judge their record in government less critically than other voters do. Among those who voted Conservative in 2024 but would now back Reform, only a fifth regret supporting Rishi Sunak's Conservatives; by contrast, more than four in five (83 per cent) of Labour-to-Reform switchers regret voting Labour. However, few Reform defectors are impressed with the Conservatives in opposition: Kemi Badenoch's ratings among them are net negative. To win these voters back, the Conservatives will need to show they are both holding Labour to account and acting as the real opposition.

Overall, Reform supporters are far more open to voting for the Conservatives than for Labour. Thirty-eight per cent of Reform supporters say they would choose the Conservatives as their second choice at an election, as do 42 per cent of 2019 Conservative voters who switched to Reform last year. Just eight per cent of those who have moved to Reform from the Conservatives since the General Election would rule out voting for the party.



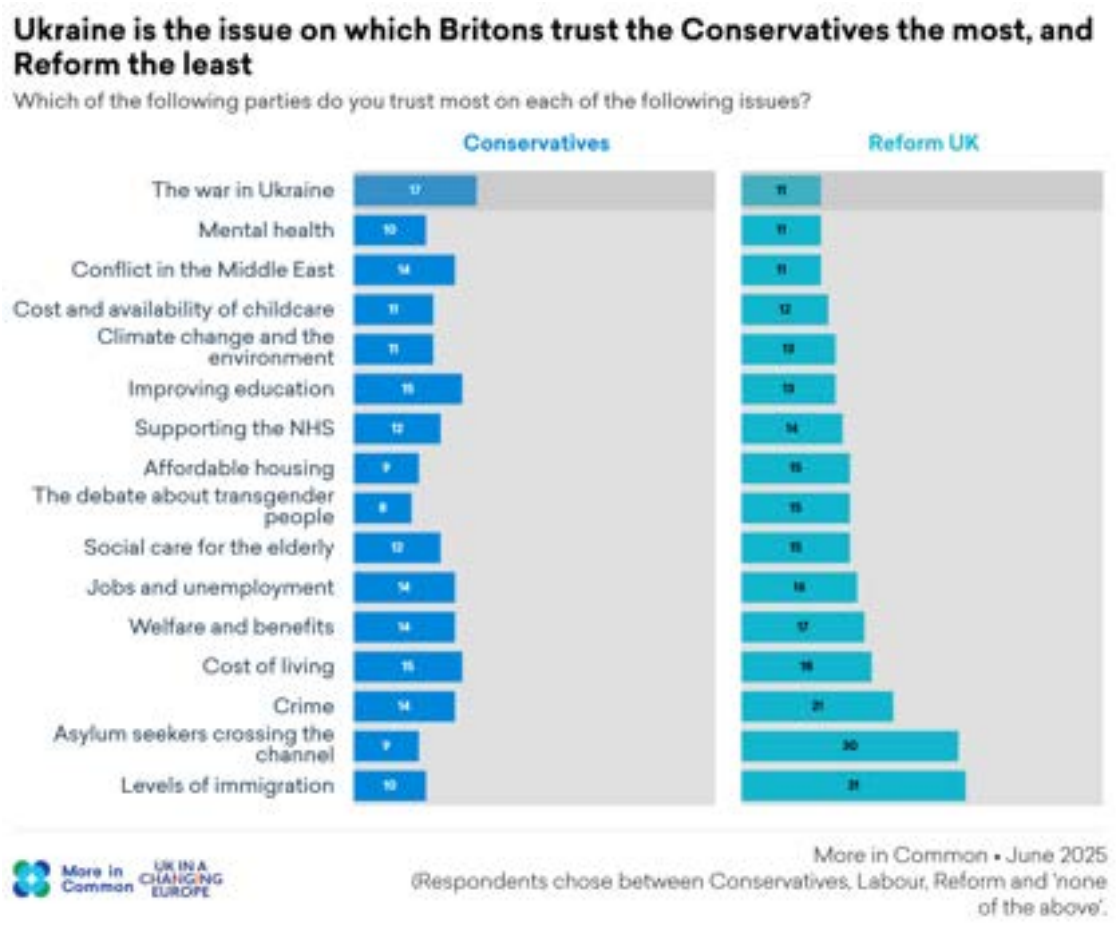
Rebuilding trust with this group on immigration will be crucial for the Conservatives to pass this viability test: 63 per cent of those who voted Conservative in 2019 and Reform in 2024 say that asylum and immigration are key issues facing the country. Meanwhile, 65 per cent say one of the Conservatives' biggest mistakes in government was failing to control immigration to the UK.

Appealing to the 'small c conservative' instincts of voters they have lost since the 2024 election is one way the Conservatives could differentiate themselves and strengthen their claim as the credible opposition on the right.

One such area is Nigel Farage's closeness to President Trump. Among 2019 Conservatives who switched to Reform in 2024, a third say this connection is a main reason they might not vote for Reform again. This suggests the Conservatives could benefit from both distancing themselves from President Trump and drawing attention to Reform's association with him.

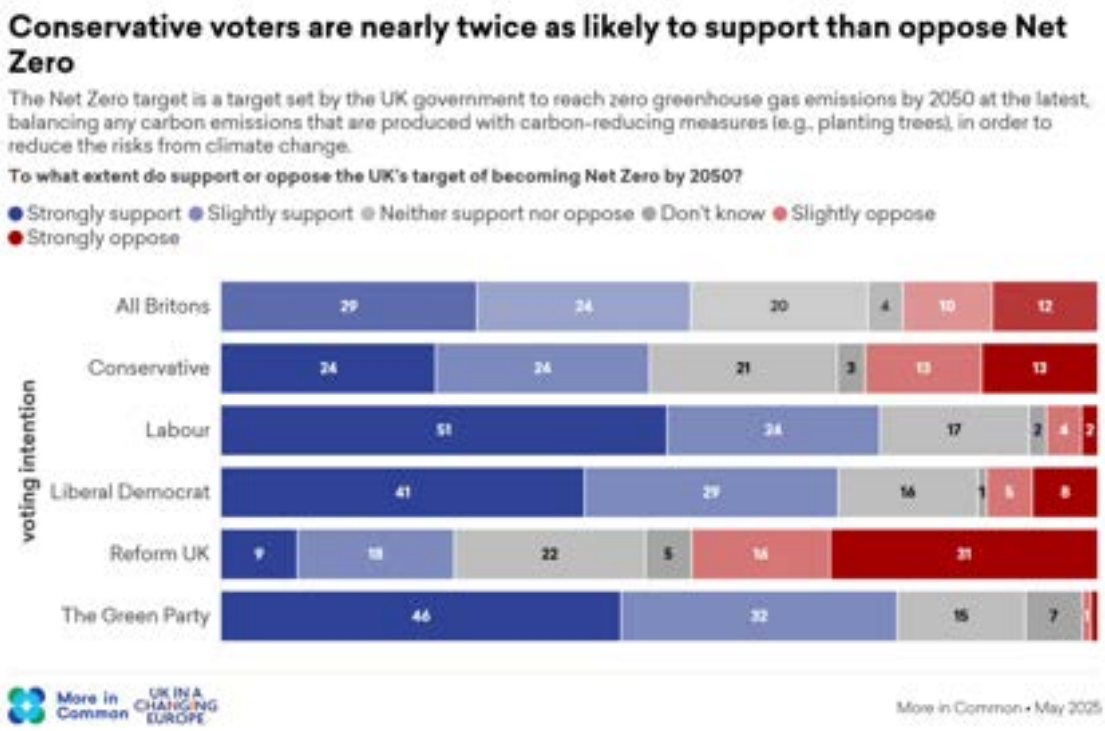
Another area is the war in Ukraine. The Conservatives' record on the conflict is one of their strongest appeals to the public and the issue on which Britons trust them most, while it is also the issue on which Reform is trusted least.

Only 27 per cent of the public believe Nigel Farage sympathises more with Ukraine than with Russia, compared with 43 per cent who say the same of Kemi Badenoch. Even among Reform supporters, 72 per cent say Ukraine's defence is important to the UK, rising to 83 per cent among Conservatives. Farage's perceived wavering could therefore be a significant liability, giving the Conservatives space to underline their conviction on an issue that is important to the public.



The third area is climate change. While many Britons are cautious about moving to Net Zero in a way that might raise energy bills or damage the economy, most across the political spectrum want strong action on climate, including a majority of Reform supporters.

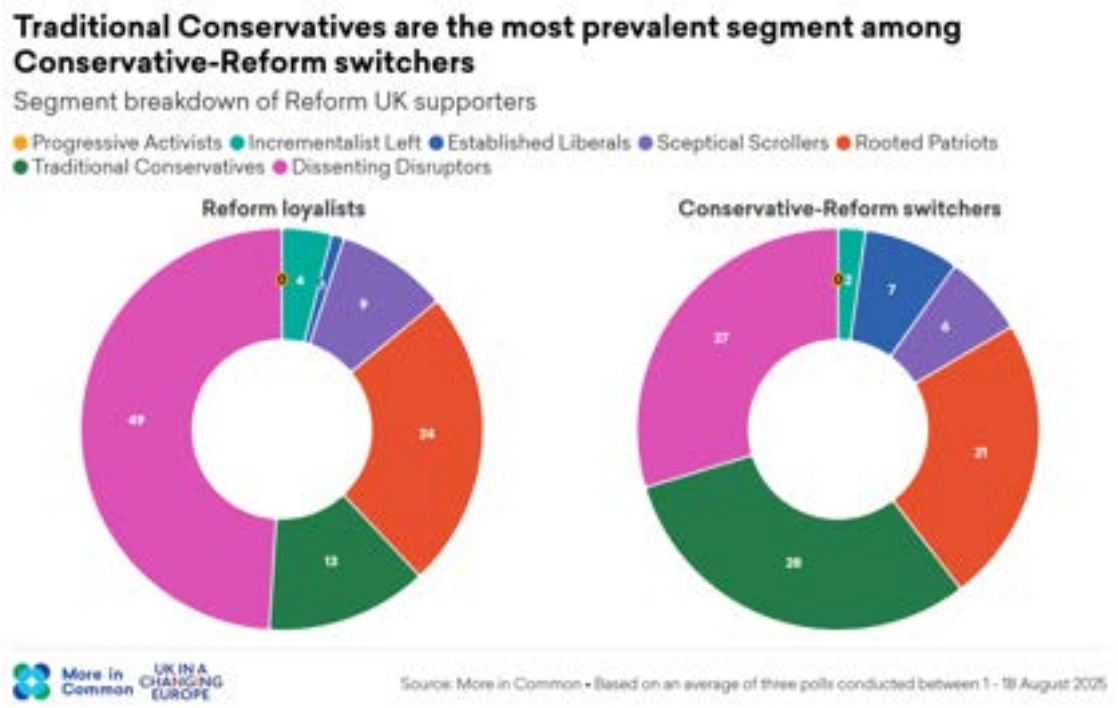
As explored in Chapter 1, Reform supporters are sceptical about Net Zero, but few are attracted to the party because of its environmental stance. Climate change ranks low as a priority for Reform voters: Conservative supporters are three times more likely than Reform supporters to see it as a top issue, and twice as likely to support Net Zero as oppose it. Conservative opposition to Net Zero beyond their current stance on the 2050 target is unlikely to win over Reform's supporters, but it risks alienating the Conservatives' remaining base, who tend to support it.



Much like Labour, the Conservatives will need to understand the changing makeup of Reform's support if they want to engage those most likely to return. Only 13 per cent of Reform loyalists belong to the Traditional Conservative segment, whereas they are now the most prevalent segment among Conservative–Reform switchers. This segment has long formed the core of Conservative support but now leans narrowly toward Reform. They are the most likely to return if the Conservatives can pass the viability test as a real opposition to Labour, and should be the party's target in their strategy to tackle Reform.

Unlike Reform's base of Dissenting Disruptors, Traditional Conservatives value stability and do not want to dismantle the system: four in five say Britain's institutions are worth preserving and improving, compared to just two in five Dissenting Disruptors. They may be unhappy with the country's direction, but they are sceptical of radical solutions and want opposition politicians who are credible and committed to Britain's institutional heritage.

Arguments that cast doubt on the feasibility of non-mainstream economic policies, or which position Reform on the economic left, may win back Traditional Conservatives. But ultimately such messaging will only resonate if the Conservatives themselves are offering a credible alternative. In that sense, Kemi Badenoch's decision to delay setting out a detailed policy agenda until trust is rebuilt may be sensible. The Conservatives could still win the battle for the right of British politics, but only by demonstrating viability and credibility, though time does appear to be running out.



For Reform

Nigel Farage faces a choice. The party's strategy until 2024 enabled them to earn 14 per cent of the vote and four MPs, a successful outcome for a protest party. Yet their polling since the general election, and their performance in the local elections earlier this year, prove that they have potential to be more than a protest party. To move from a party of protest to a party of government will require them to build a policy agenda that appeals to an increasingly broad and diverse base, and to address deep-seated concerns about their credibility.

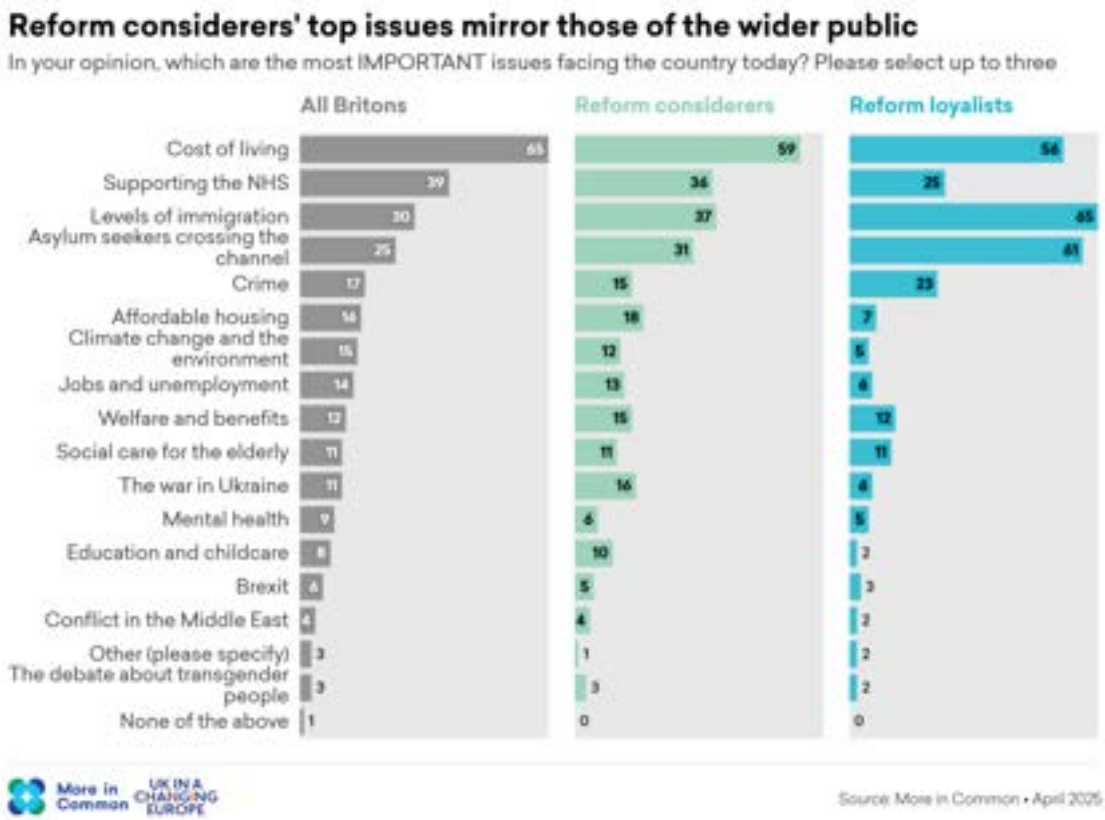
Of likely voters who currently do not plan to vote for Reform UK, nearly a fifth (18 per cent) would consider doing so. If they did, Reform could win 42 per cent of the vote. Yet winning these voters would not be an easy task, and would require the party to understand what appeals to these 'considerers' and what is holding them back.

The obstacle preventing those considering Reform from making the leap is not the party's leadership. Despite being a polarising figure among the general public, Nigel Farage is popular among Reform considerers. Forty-four per cent like the Reform leader, while just 14 per cent dislike him. Fifty-one per cent approve of the job he is doing as the leader of Reform.

Instead, Reform considerers primarily say that the party's lack of experience in government (38 per cent) and Farage's support for Donald Trump are reasons not to vote for the party. Nineteen per cent also have concerns about party infighting: about a third were aware of the spat between former Reform MP Rupert Lowe and Nigel Farage. Thirty-four per cent of those considering voting for Reform said that the party's suspension of MP James McMurdock, after concerns about government loans he received for two businesses during the Covid pandemic, made them less likely to vote for the party - though 38 per cent said it made no difference.

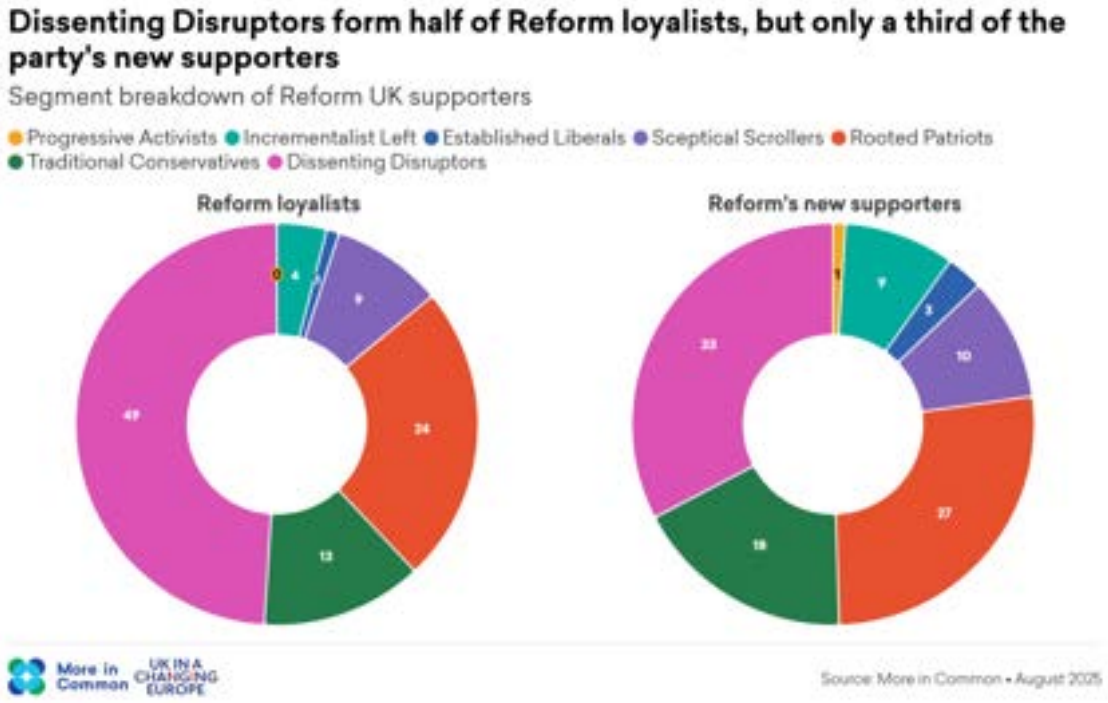
Professionalisation, proving the party's ability at a local level after its wins across England in May 2025, and creating some distance between Donald Trump and Farage will be crucial to shoring up this group's support before the next general election.

While those considering Reform are concerned about immigration, this is not their priority issue, and a significant portion think the party's approach to it is too harsh. Those who would not currently vote for Reform are more likely to say that its policies on immigration are too strict (36 per cent) than too weak (10 per cent), while 30 per cent say it is about right. Instead of immigration, this group prioritises the cost of living. Around three in five say this is their key issue, compared to 37 per cent who say levels of immigration, and 31 per cent who say asylum. Using a broader platform to criticise the Government on issues other than migration will be important if Reform wants to be credible to this group and to show that they are not just a one-trick pony.



Crucially, a strategy that aims to reach the 42 per cent of voters who would consider Reform would require the party to understand the various segments of their new support base, and particularly the diminishing importance of Dissenting Disruptors.

In the 2024 general election, nearly half of Reform's voters belonged to the Dissenting Disruptor segment. When looking at their new supporters, this drops barely a third (33 per cent). And among the 'considerers' that Reform may need to win at the next election, less than a quarter (23 per cent) belong to the Dissenting Disruptor segment.



Dissenting Disruptors are the most vocal and engaged segment of Reform's coalition: a third (32 per cent) say they post about politics on social media at least from time to time, compared to a fifth of Traditional Conservatives (20 per cent) and just 14 per cent of Rooted Patriots. So while the segment's share of Reform's vote base may contract, they will likely continue to be the most visible Reform supporters online. If Reform UK wishes to expand their support beyond their highly engaged base, they will need to understand the ways in which this vocal minority diverges from the other voters they need.

This matters to Reform for a number of reasons. First, credibility: as in Chapter 2, Reform's supporters diverge in their attitudes toward radical change. Most Dissenting Disruptors believe that fast, radical transformation is needed to change the country, whereas Rooted Patriots and Traditional Conservatives prefer gradual, incremental progress. Securing these voters will require Reform to be more than a protest party, and to offer a credible plan that meets their demands for stability.

But reaching these voters will require more than professionalisation: the party will also need to moderate its positions to avoid alienating people beyond its engaged base. Dissenting Disruptors stand out within Reform's support base: they are more likely than other segments to believe conspiracy theories, to hold negative views of certain religious or ethnic groups, and to condone violent protest. More than a third of Dissenting Disruptors (34 per cent) say that those participating in protests and riots last summer "spoke for them", compared with 18 per cent of all Britons and 14 per cent of Rooted Patriots. Likewise, after protests around asylum accommodation in July 2025, 21 per cent of Dissenting Disruptors said violent protests were justified, while only 11 per cent of Rooted Patriots and Traditional Conservatives agreed.

Racist narratives and divisive rhetoric may appeal to some on the online right, but they are repellent to the wider electorate, including many would-be Reform voters. The perception that Reform is a racist party has consistently ranked among the top reasons Britons give not to vote for the party.

One of the key lessons for each party is to avoid viewing Reform's supporters as homogenous. And this lesson is more important to Nigel Farage himself than anyone else. In the past, Farage and his parties have been held back by extremism in their ranks. There is clearly space for a populist party on the right of British politics, but to succeed they must look beyond their most engaged, radical base and establish a broad church of disillusioned voters.