Persuasion UK

Getting to know ‘Reform curious Labour voters’

How might Labour hold together its coalition, or Reform win Labour votes?

Persuasion UK, April 2025

Lead author: Steve Akehurst

Acknowledgements

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Executive summary

In order to understand Reform curious Labour voters – and the potential for Labour to Reform switching - it is essential to first put both in perspective. A good amount of commentary in this area is wide of the mark.

- Historically speaking, Reform voters are not 'Labour's lost voters'. About 74% of 2024 Reform voters have not voted Labour in a single general election since 2005 (as far back as we have data for). Most are historically anti-Labour voters who have cycled between voting Conservative, UKIP, non-voting or even Liberal Democrat. This is as true in the 'Red Wall' or Labour-Reform seats as elsewhere.

- Looking forward, about 11% of the 2024 Labour vote is currently open to voting Reform at the next election. But for Labour this is dwarfed by the number of Labour voters on the other side of their coalition open to voting Green (29%) or Lib Dem (41%), who are spread out across Labour-held seats, including in Labour vs Reform constituencies. Basic MRP analysis suggests Labour would lose 123 seats if all Reform curious Labour voters defected, but 250 if all Green curious Labour voters did the same. This creates a difficult balancing act for the government; they need to hold both sides to win next time.

- Indeed Labour to Reform switching cannot and should not be dismissed. It is notably higher in Scotland, while – as a group – Reform curious Labour voters are more unhappy with Labour and Keir Starmer, less open to voting Labour next time and less amenable to squeeze messages.

'Reform curious Labour voters' are different to the wider Reform vote in important ways, even if they share similarities. The issues Labour and Reform use to talk to these voters has to be tailored appropriately.

- While Reform curious Labour voters are socially conservative in their social views, they tend to wear these views more lightly than core Reform voters. For instance, only 16% of Reform curious Labour voters watch GB News - compared to 37% of all Reform voters.

- An illuminating case study on the difference between the two concerns

Net Zero. Core Reform voters now find themselves very hostile to the green transition - but 'Reform curious Labour voters' are not. While they care about it much less than the wider Labour vote, they remain broadly sympathetic, in line with the public at large. Hostility to Net Zero is therefore unlikely to win Reform many Labour votes, while diluting ambitions on climate will not help Labour assuage Reform curious voters either (while also posing big risks elsewhere in its coalition).

- Perhaps most notably of all, Reform curious Labour voters are much more economically populist than Reform voters overall, backing things like government regulation and taxation on the richest in far greater numbers. They are also, for instance, more attracted to ideas like building more council housing, being more likely to be social renters themselves.

- The proximity of Reform to Donald Trump and Elon Musk is an obvious weakness for Nigel Farage's party. In general these figures split the Reform coalition between its most and least radical flanks. Reform curious Labour voters cite Farage's friendliness with Trump as a key hesitation in making the jump over to his party.

However, there are still many similarities between Reform curious Labour voters and the wider Reform vote – and a couple of key things pull them towards Reform.

- Strong discontent on the issue of immigration is a clear 'pull' factor to Reform. In reality, concerns on this matter are dominated more by the spectre of asylum, rather than overall migration numbers per se. Among the 66% of Reform curious Labour voters choosing immigration as a key issue, small boats and asylum hotels are the overwhelming priority..

- Beyond policy, Reform curious Labour voters have a broader anti-system, anti-politician bent - and in many cases are more nihilist than core Reform voters. For instance, when explaining their attraction to Reform, they are more likely to say things like 'we have tried everything else, we might as well roll the dice' or even 'all politicians are in it for financial gain'.

- These voters are also demographically similar to the wider Reform vote: older, more working class, much less university educated. This continues to be the kind of voter in Reform's orbit, not younger voters.

In general, Reform curious voters pose a 'balancing dilemma' for Labour. Its election winning coalition is somewhat split on cultural issues - with Reform sympathetic Labour voters on one side and a larger number of socially liberal, Green/Lib Dem curious Labour voters on the other. This creates a legitimate risk of both under-reaction and over-reaction to the Reform threat.

- For instance, on issues like immigration, human rights, the death penalty and free expression, Reform curious Labour voters are closer to the Reform vote than voters on the other side of Labour's coalition - even if they are less strongly conservative than core Reform voters.

For Labour, the good news is there is a potential way to thread the needle, at least in terms of the issue agenda. In our unique experiment with 1,000 Labour voters, combining moderate signalling on culture with more confident populist positions on economic fights - plus positive signalling on Net Zero - saw off both Reform and the Greens simultaneously. In addition, tactical voting could yet prove pivotal.

- In our experiment, adopting the most liberal or conservative postures on issues like immigration or asylum either lost Labour more votes than it gained, or else cancelled itself out. More moderate positions were not spectacular, but held things together.

- However, it's the economic axis which fundamentally unites Labour's vote, if lent into properly. Rebuilding public services in particular remains central to Labour's mandate, and is by far its most effective potential wedge issue. This and dividing lines on wealth taxation, for instance, were highly effective at stopping leakage to both Reform and the Greens.

- Provided noticeable cost and inconvenience to consumers is avoided at a policy level, unambiguously pro-Net Zero signalling is more or less all upside within the Labour coalition, being one of the most vote moving positions we tested. This is not because climate action is highly salient to Reform curious Labour voters - it isn't. But rather, it's not unpopular, meaning it helps Labour stem defections to its left without costing it votes to the right. For the same reason, in our experiment, reneging on Net Zero was one of the most vote losing positions Labour could adopt among its 2024 vote.

- Labour in government has already made a set of clearly progressive policy choices on issues like workers rights, taxation to fund public services, renting reform and clean energy. It could start by welcoming fights with opponents on these issues, not shrinking from them. This would have the double benefit of helping to raise the salience of these issues over cultural divides, while reminding its coalition of the values of economic justice which, in the end, still bind it together.

- In the event Labour can avoid alienating either end of its vote en masse, there is some evidence framing the next election as a choice between Labour and Reform could reap electoral benefits. The party's tactical voting advantage against the Conservatives has diminished since the election, but when voters are asked to choose between Labour or Reform, the government's lead over Nigel Farage's party extends significantly.

For Reform, meanwhile, there is also a clear pathway to winning more Labour votes, adding these voters to its already energised base. If they wish to maximise the share of the Labour vote, one clear path is to combine strong positions on issues like immigration with outflanking Labour on economic issues.

- There remains some anxiety even among Reform curious Labour voters that Reform represent extreme or racist cultural positions that go beyond concerns over migration. Reform will need to assuage this, although provided they can avoid explicitly extreme or prejudiced positioning, these issues are clearly a net plus for them.

- In our experimentation with Labour voters, other scenarios which pulled Labour over to Reform were when Labour ran to Labour's left on things like funding for public services, wealth taxation and strengthening workers rights.

Research objectives

Looking in particular at key battleground seats, we set out to examine:

- What is the historical relationship between the existing Reform vote and Labour?
- How much of Labour's vote in key seats is genuinely susceptible to voting for Reform at the next election?
    - What are the different factors or issues that might drive them there?
    - What might prevent them from doing so?
- Looking at the previous two questions, what trade-offs exist across the government's electoral coalition?
    - That is, where does appealing to Reform voters have consequences elsewhere and vice versa?
- What is the best path for Reform if it wishes to maximise its share of the Labour vote, and what is the best path for Labour if it wishes to retain these voters in coalition with the rest of its election winning vote.

Methodology

We have undertaken what, to the best of our knowledge, is the most in-depth look at Reform curious Labour voters and dynamics within the current Labour coalition that has been freely published to date.

This involved extensive qualitative and quantitative research, assessing both existing and newly commissioned evidence. In total we undertook the following:

- x4 focus groups with Reform curious Labour voters in January 2025, via CRD Research. Two of these were in England (Leeds and Birmingham) and two in Wales (South Wales; Bridgend and Neath). All were held in Labour held constituencies where Reform is in second place as of the 2024 general election..

- Analysis of existing data-sets, most notably the British Election Survey (BES) and, concerning attitudes to Net Zero, data made available to the author through the Labour Climate and Environment Forum (LCEF), the most recent of which was commissioned through Opinium in February 2025.

- New polling commissioned by YouGov in March 2025.
    - A GB-wide survey of 4,531 adults, weighted to be nationally representative
    - A survey of 815 'Reform curious Labour voters' (Labour 2024, >5/10 willing to vote Reform at the next election)
    - A 1,000 person dedicated survey of Wales, weighted to be nationally representative

- In addition, MRP analysis was conducted on every Parliamentary constituency, quantifying both Reform and Green curious Labour voters at a seat level. This was conducted by YouGov.

- Finally, two discrete conjoint experiments were commissioned via polling company NorStat. The first involved 1,000 Labour voters and 500 Reform voters. The second involved 1,000 Labour voters.

The project was paid for via core funding that Persuasion receives from its funders. IPPR were not a formal partner on this particular project.

Section 1: Putting ‘Labour to Reform’ switchers in perspective - then quantifying them

Before considering the different factors which might persuade Labour voters to and from Reform UK, it is first important to understand the longer-term relationship between the two parties’ voter base. We can then look at how this might change in this Parliament, placing Labour voters susceptible to switching to Reform within a broader picture of the Labour coalition.

For this we can use existing data and new polling commissioned by Persuasion via YouGov.

Historically speaking, Reform voters are not ‘Labour’s lost voters’

The British Election Study (BES) data series studies the same survey respondents over time. In doing so, it allows us to track the voting history of voters all the way back to 2005. A very large sample of Reform voters in their post-2024 election wave provides a good basis for analysis, at least among those for whom historical data exists.[1]

When we look at Reform voters’ historical voting behaviour in BES’ post-election survey wave, we find a revealing and slightly counter-intuitive picture. In general, between 2005 and 2019, Reform supporters show very low levels of Labour voting during this time, with the Labour share of these voters never breaking beyond 20% achieved in 2005.

1 In total, Wave 28 of the British Election Study (July 2024) had a total of 3,533 Reform UK voters at the general election. Past vote data is available for 3,478 (98%) of them from 2019, 3,363 (95%) of them from 2017, 2,933 (83%) from the election of 2010 and 2,372 (62%) from the election of 2005. All data and graphs in this section of the report exclude 2024 Reform voters we don’t have past data for.

Overall, we see:

- In total, about 74% of the 2024 Reform has not voted Labour in a single general election held between 2005 and 2019 - and these are just the elections we have data for.

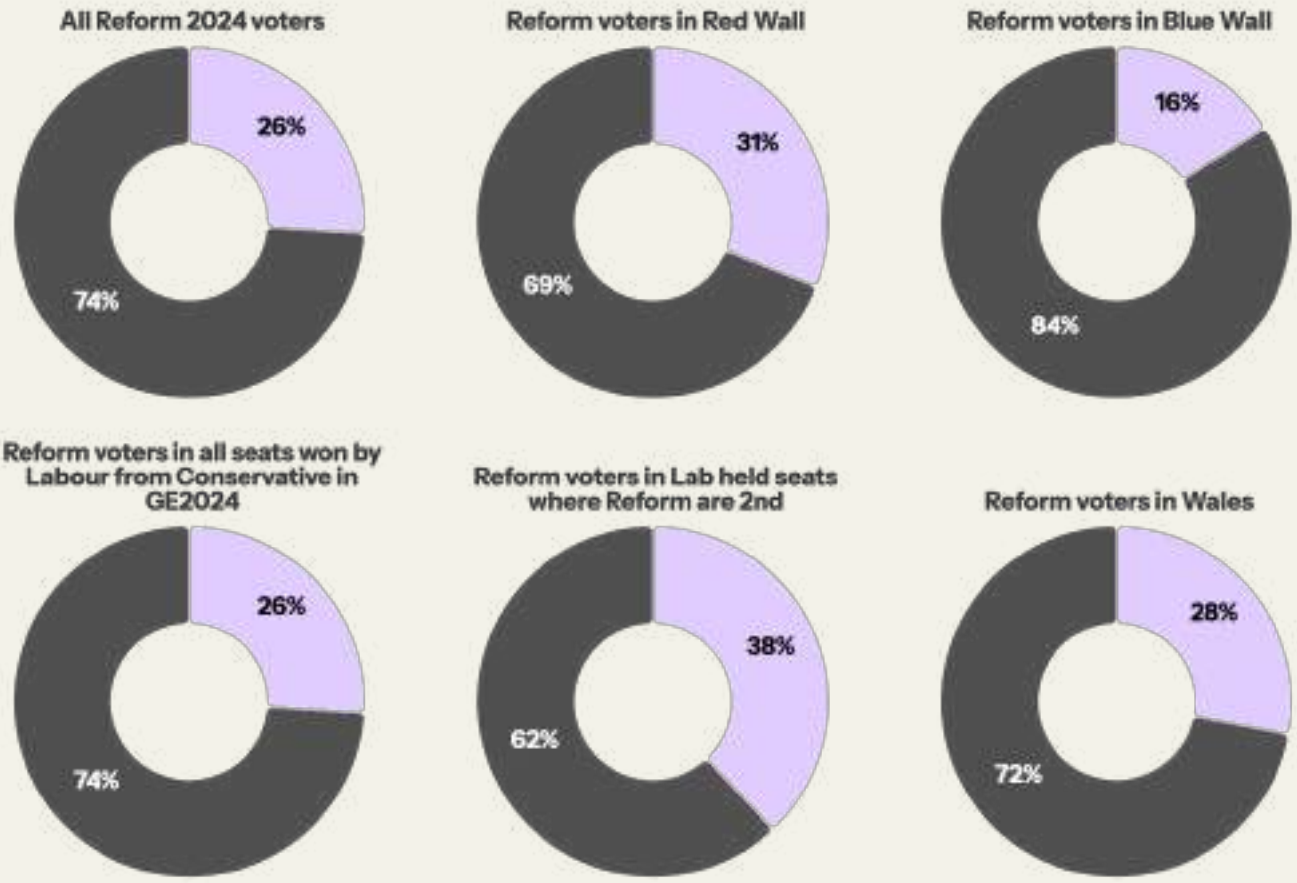
- There is some geographic variation to this, but not much. Even in 'Red Wall' seats, 69% of Reform voters have not voted Labour this time. That figure is 62% in seats where Reform are second and in Wales it goes for 72% of Reform voters.

- Instead, Reform voters have mostly cycled between parties of the right. The Conservative share of these voters hovered just above or below 40% for much of 2005-2015, though UKIP surge claimed 33% in 2015. After that, Brexit saw a large majority of these voters collapse into the Conservative vote share - first under Theresa May and then more completely under Boris Johnson - before the Conservative's coalition unravelled in 2024.

For this reason, it is worth thinking of the vast majority of Reform voters as historically 'anti Labour voters' who are simply not, and seemingly never have been, in the Labour electoral universe.

Reform 2024 voters and their historical relationship with Labour

Voted Labour in at least one general election between 2005-2024
Did NOT vote Labour in any general election between 2005-2024



British Election Study (BES) longitudinal panel data. Latest wave panel data does not go further back than 2005.

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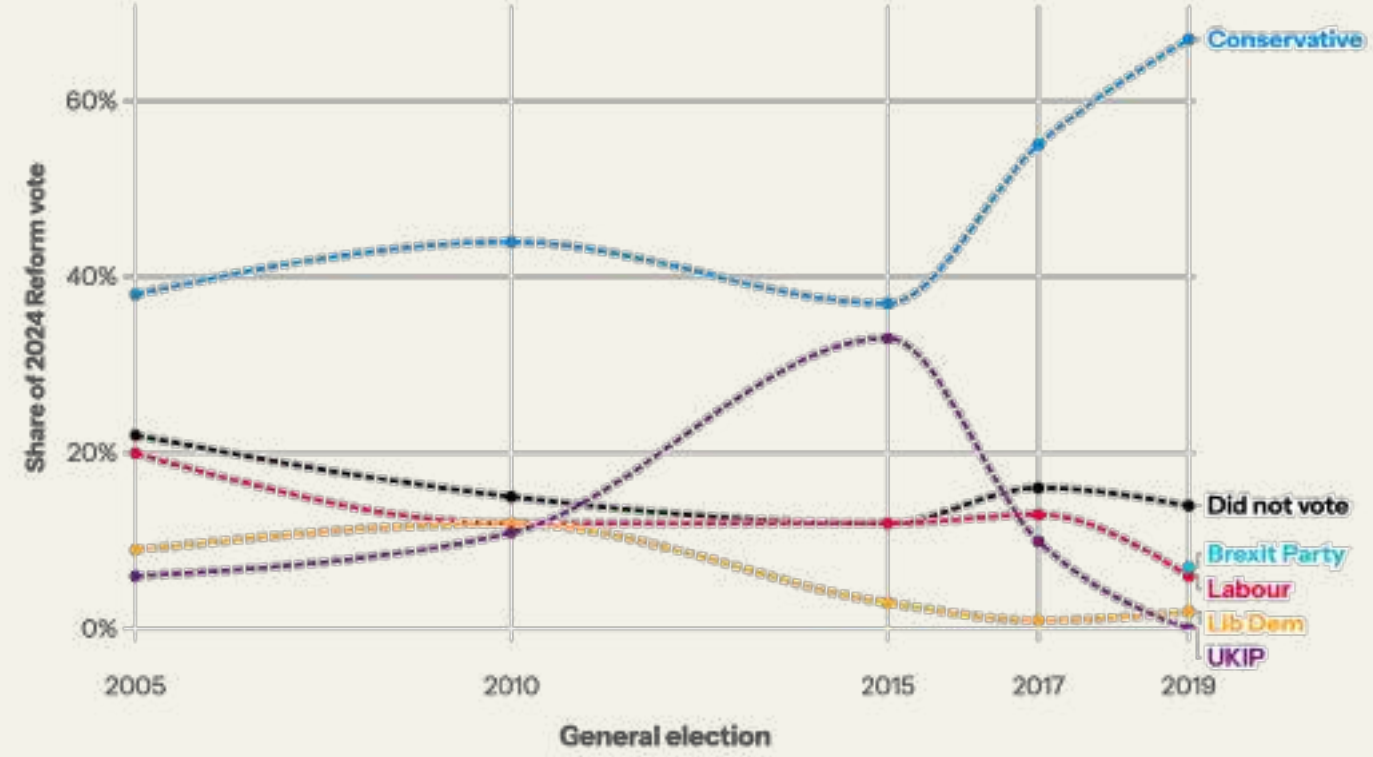
How 2024 Reform voters voted in every general election since 2001



British Election Study (BES) longitudinal panel data. Smaller parties (<1%) excluded for ease of visualisation.

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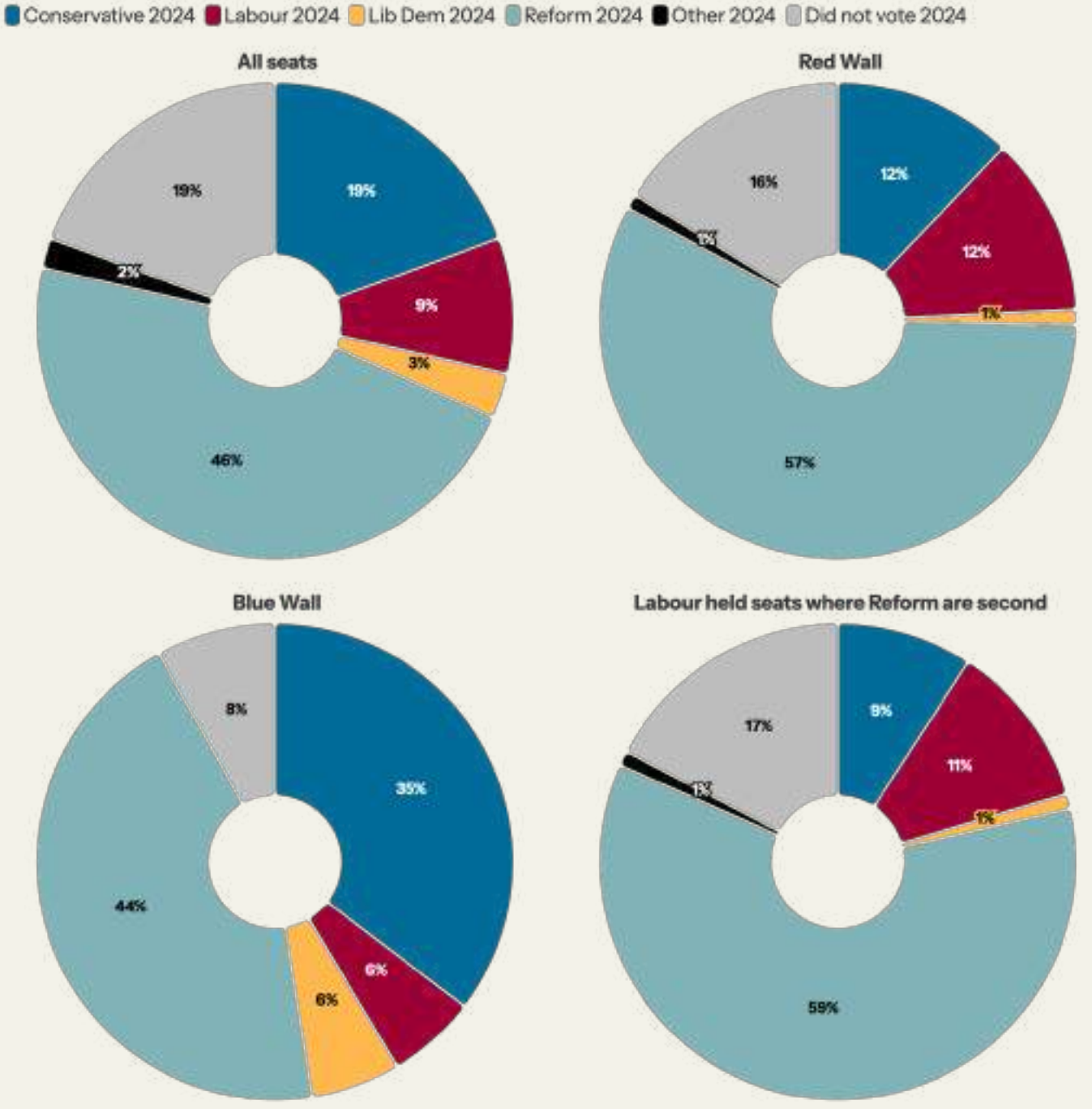
We see more evidence of this trend in the current Reform vote. As of April 2025, most of the new additions to the Reform coalition have come from the 2024 Conservative vote or non-voters (many of whom themselves are 2019 Conservatives who just sat out 2024).

Composition of current Reform vote, by seat type

The additional Reform vote very largely comes from 2024 Conservatives and non-voters (many of whom were Con 2019 voters)

As of April 2025



YouGov for Persuasion UK, April 2025. Smaller parties (<1%) excluded for ease of visualisation.

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There is a group of Labour voters open to voting Reform at the next election - albeit they are just one part of a complicated Labour coalition

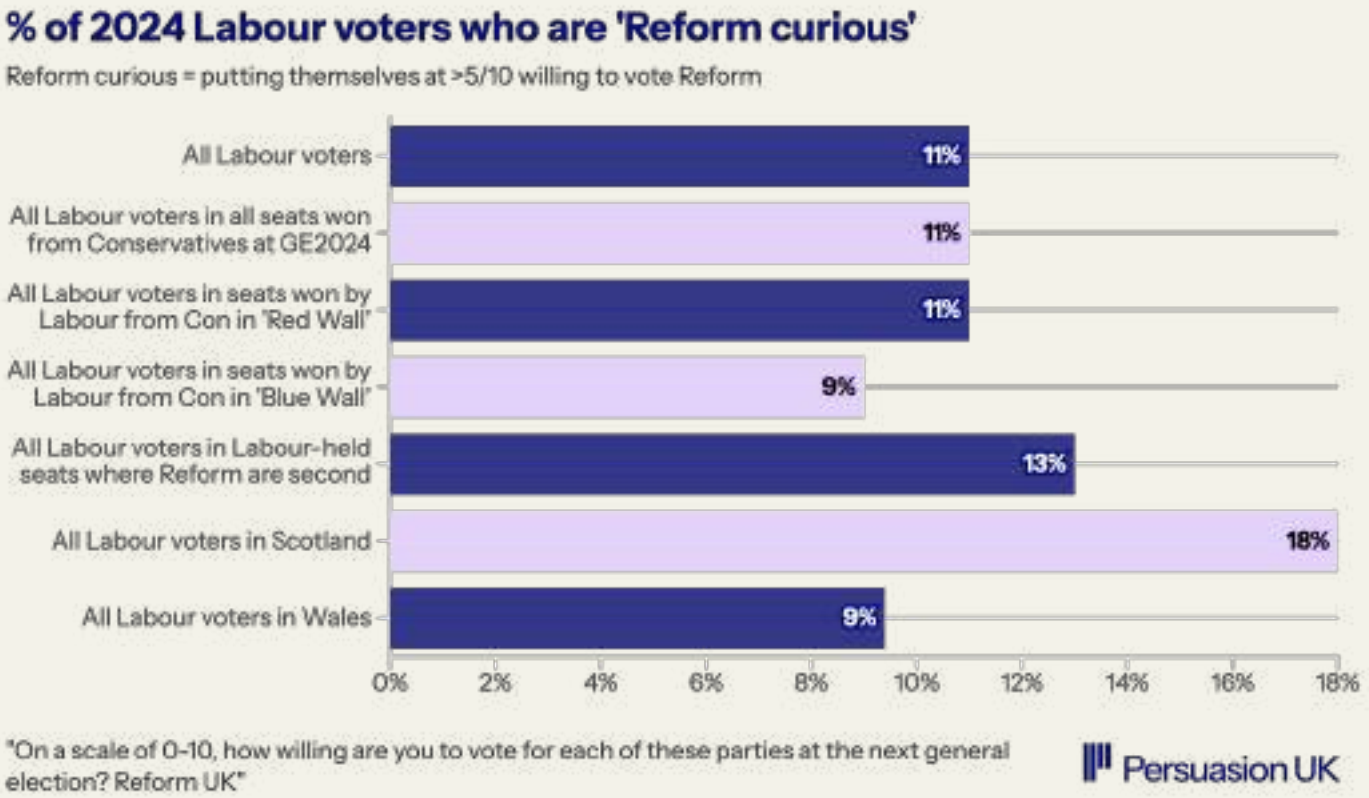
Despite historical trends Labour to Reform switchers do exist - as do a wider pool of the Labour electorate who have not yet made the switch but are susceptible to doing so. Perfectly identifying the total pool of possible switchers is not straight-forward, but one simple way is to use 'propensity to vote' scores. That is, we ask 2024 Labour voters to rate their willingness to vote Reform at the next election on a scale of 1 to 10, then isolate the fraction putting themselves at six or above.[2]

MRP analysis also allows us to see where the share of Reform curious Labour voters is highest in the country.

On this score, we find:

- About 11% of Labour voters are currently open to voting Reform.
- This rises slightly as we go into the electoral battlegrounds of England, but not much.
- It is only notably higher in Scotland, where 18% of Labour voters are Reform curious - an under-reported phenomenon. Indeed, of the top 10 Labour-held constituencies with the most Reform susceptible Labour voters, 4 are in Scotland.

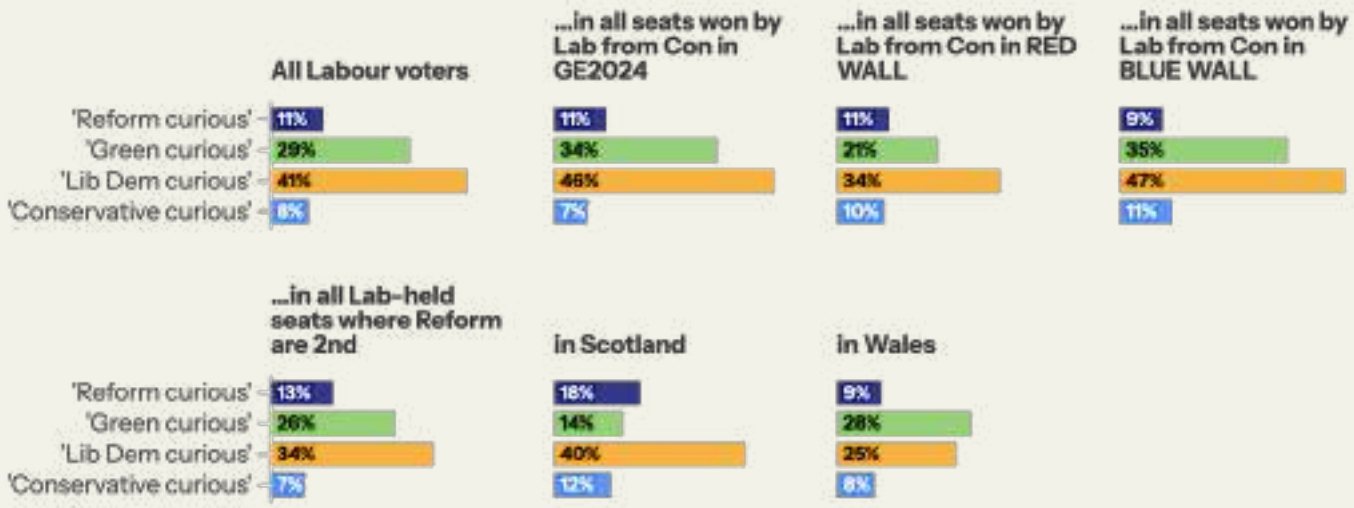
2 This has the benefit of allegedly being the way that Labour themselves identified its target 'hero voters' in the 2019-2024 Parliament, in that case being Conservative 2019 voters who put themselves at more than 5 out of 10 on a scale of willingness to vote Labour.



It is important, though, to set this in the context of the wider Labour electoral coalition. As we see below, if we ask a similar propensity to vote question of Labour voters concerning the Greens or the Liberal Democrats, we find that Labour voters susceptible to switching to these parties far out-number Reform.

% of 2024 Labour voters who are open to voting for other parties, by battleground

Even in the 'Red Wall' and Reform friendly seats, Labour has two/three times more voters open to voting Green or Lib Dem than Reform



"On a scale of 0-10, how willing are you to vote for each of these parties at the next general election?". Voter counted 'party curious' if putting themselves above 5/10. YouGov for Persuasion UK, April 2025.

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- In total, there are nearly three times as many Green curious Labour voters (29%) as Reform, and nearly four times as many Lib Dem curious Labour voters (41%).

- This changes only slightly once you get into the electoral battlegrounds. In all seats Labour won from the Conservatives, Green curious Labour voters outnumber Reform by 3:1, and their Lib Dem equivalents do so by 4:1. Even in the Red Wall seats Labour won, there are nearly two times as many Labour voters open to voting Green (21%) and three times as many open to voting Lib Dem (34%) as Reform.

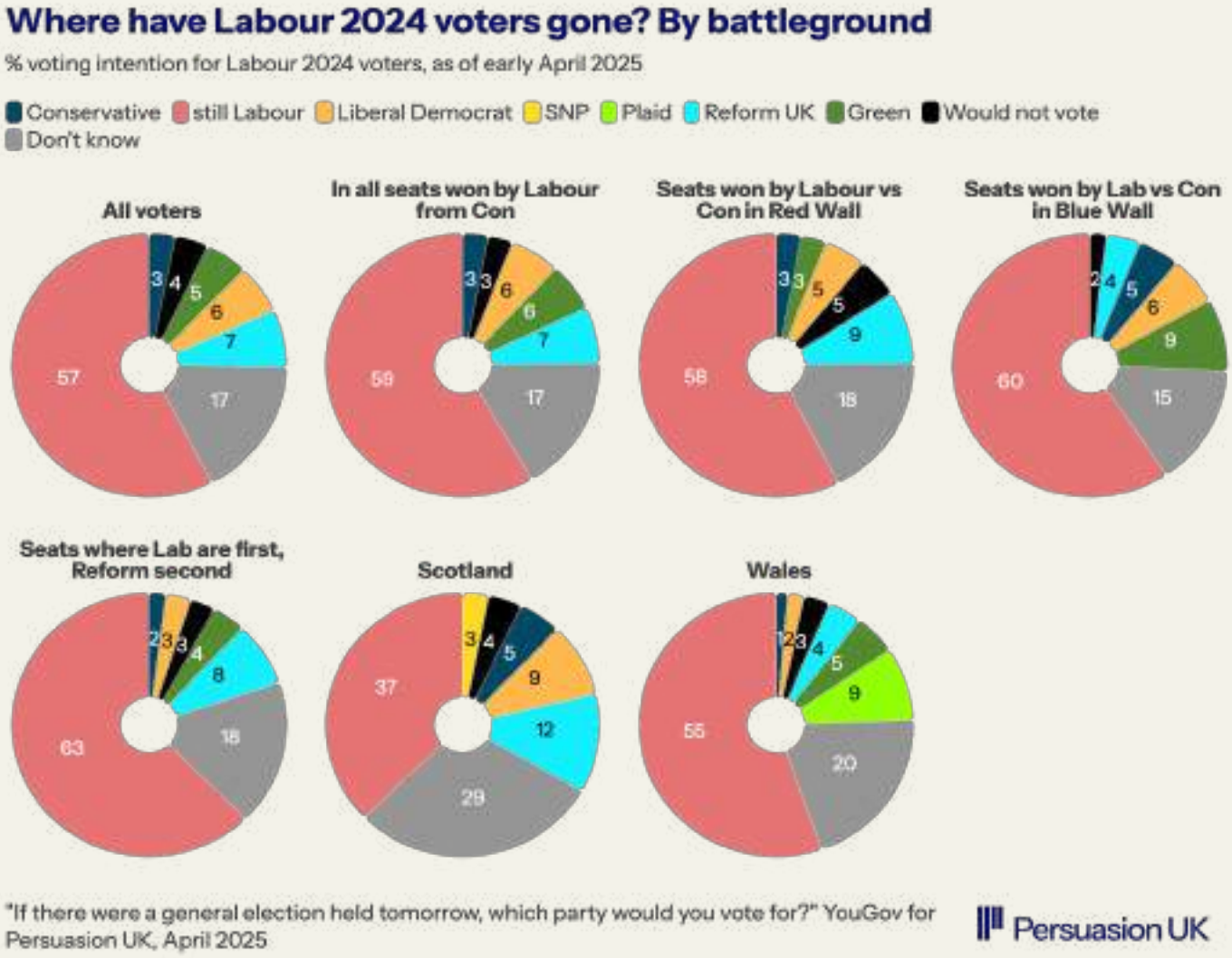
- Using MRP to map this down to a constituency level also illustrates the point. Holding everything else constant, in the event that every Reform curious Labour voter defected to Reform, Labour would lose around 123 seats. However, if every Green curious Labour voter likewise defected from Labour, they would lose 250 - more than twice as many. Behaviour like this in a complicated electorate is of course highly unlikely, but it underscores the relative size of these groups and Labour's vulnerability on its left flank.

More detail on our MRP analysis is available in the interactive table on the summary page of this research on the Persuasion website.

The truth for Labour is all these groups matter and the skill will be in keeping both inside the tent, not trading one off at the expense of the other.

Indeed, the direct threat of Labour to Reform switchers cannot be entirely disregarded any more than Green or Lib Dem switchers. In current polling, about 7% of the 2024 Labour vote has switched to Reform - 9% in the Red Wall, 12% in Scotland. In Labour-Reform seats, these votes also 'count twice'.

Moreover, even though this category of Labour voter are smaller, they are angrier at Labour. For instance, only 21% of them have a positive view of Keir Starmer. In addition, about 30% are 'hero voters' Labour won directly from the Conservatives in 2024.



Tactical voting dynamics could prove decisive

Finally, it is commonly said that the UK now functionally has 'five party national politics inside a two party system', as partisan loyalty to the two traditional parties waxes and wanes. But it is less often acknowledged how crucial tactical voting dynamics therefore become to election outcomes.

Standard voting intention questions can sometimes be limited in this regard. It is useful to ask follow up questions to respondents, asking how they would vote if only party A or B could win in their area. Prior to the general election, this proved particularly prophetic in surfacing the Conservative's travails in the 'Blue Wall' especially and the resulting efficiency between the Labour and Liberal Democrat vote in forming an anti-Sunak coalition.[3]

Asking these questions again now reveals an interestingly mixed picture for the government. We can see that making the question 'Labour or Conservative?' - while still giving people the option to stick with another party if they wish to - actually now net benefits the Conservatives , as (mostly) Reform voters swing in behind the Conservatives more than left leaning voters do with Labour. This reveals that Labour's tactical voting advantage over the Conservative's has gone, as the 'anti Labour' vote makes itself more efficient.

However, making the question 'Labour or Reform?' changes this picture fairly dramatically. It produces a much clearer polling advantage nationally for Labour, taking their lead over Reform from one point in a normal poll to eight points. Looking under the bonnet, this happens partly because it helps squeeze back 2024 Labour voters who might otherwise flake off elsewhere, but also because it peels off about half of the 2024 Liberal Democrat and Green vote, while adding a non-negligible chunk (10%) of Conservative 2024 voters to Labour's pile. This suggests the higher threat perception surrounding a Reform-led government - and the polarising nature of Reform generally - may lead to a greater level of tactical voting, if voters can indeed be convinced of this as the choice before them.

For Reform, meanwhile, in a head to head with Labour they gain an even bigger chunk (42%) of Conservative 2024 voters than now (18%). They also take a slightly higher share of the Labour 2024 vote (10% vs 7% now) - though this is mostly Labour voters who would otherwise switch to Conservatives making

3 See Persuasion UK report just prior to the election, "The Blue Wall: a primer", June 2024.

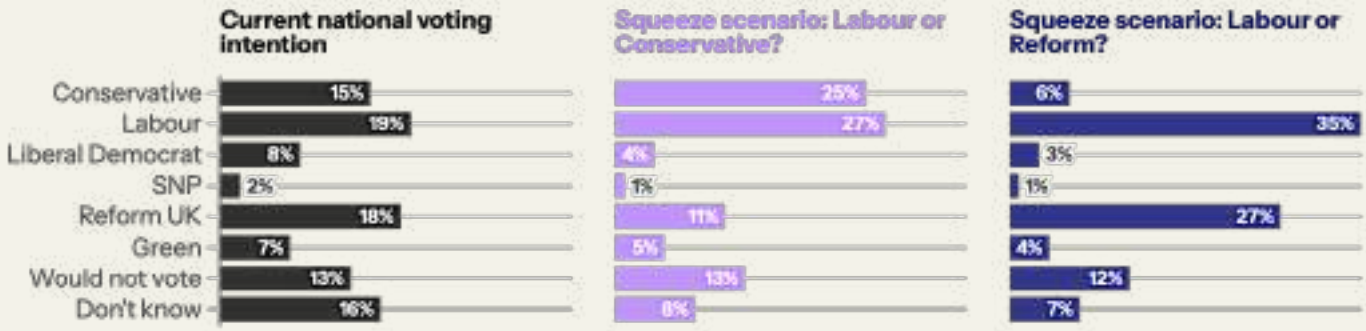
their anti-Labour vote more efficient. All told, though, it is not enough for Reform to overcome the wider flows to Labour in this theoretical scenario.

These effects are a little more muted in marginal seats Labour won from the Conservatives - owing to more 'stubborn' Lib Dem voters in those seats - but not significantly. They suggest that, for now at least, it is advantageous to Labour for the next election to be framed as a choice between Labour and Reform, and less so Labour and the Conservatives. For Reform, it is more useful for the election to be seen as a three party race.

As a side note, the share of 2024 Conservative voters (42%) who switch to Reform in 'Labour or Reform?' scenarios is much higher than Reform (24%) voters reciprocate in 'Labour or Conservative?' scenarios. Given 2024 Conservative voters also exist in higher numbers, this fluidity suggests that Reform have slightly more to gain from an informal non-aggression pact with the Conservatives than the Conservatives themselves. Regardless, any efficiency between the Conservative and Reform vote without equivalent efficiency within Britain's progressive party bloc (Labour, Liberal Democrats, Greens, Plaid) would be lethal for the government.

Voting intent in different squeeze scenarios

Labour's tactical voting advantage against the Conservative's has gone, but it remains against Reform for now. This primarily comes from squeezing don't knows (many of whom are Labour 2024 voters) as well as squeezing the Lib Dems and Greens.



"If there were a general election held tomorrow, which party would you vote for?". Thereafter, sample split into one of the following: "Now imagine that at the next UK general election the only parties that could realistically win in your constituency were [A - the Conservatives]/[B - Reform UK] or Labour, although other candidates and parties would still be on the ballot. How do you think you would vote in this situation?". YouGov for Persuasion UK, April 2025.

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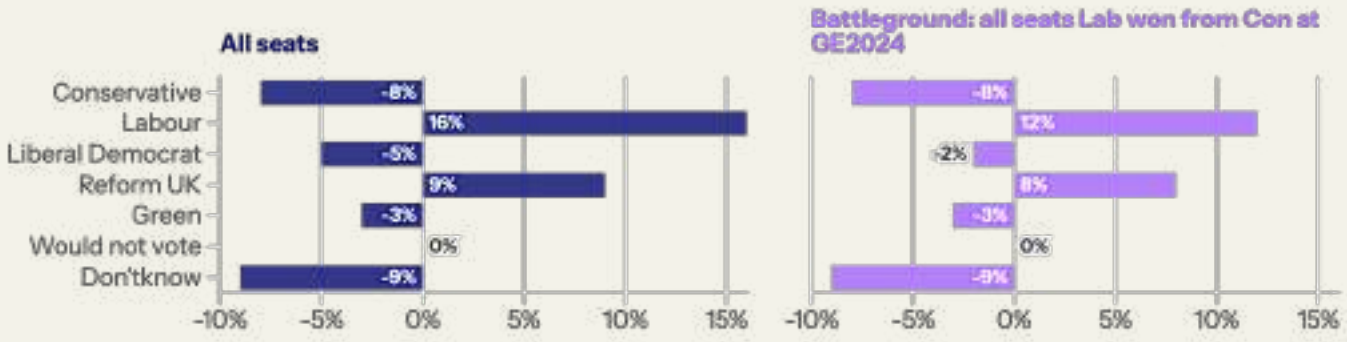
Change in vote share vs current voting intent in 'Labour or Reform squeeze scenario', by seat type

The advantage Labour gets from making a contest 'Labour or Reform' is slightly reduced in battleground seats, but not by much. This is likely because the residual Lib Dem vote in Lab vs Con battlegrounds is more stubborn.



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Section 2: Who are ‘Reform curious Labour voters’ – and how do they compare to the wider Reform vote?

Having isolated Reform curious Labour voters as a group, and placed them in clearer view, we can start to see how they differ not just to the wider Labour vote but the Reform vote too.

Basic profile

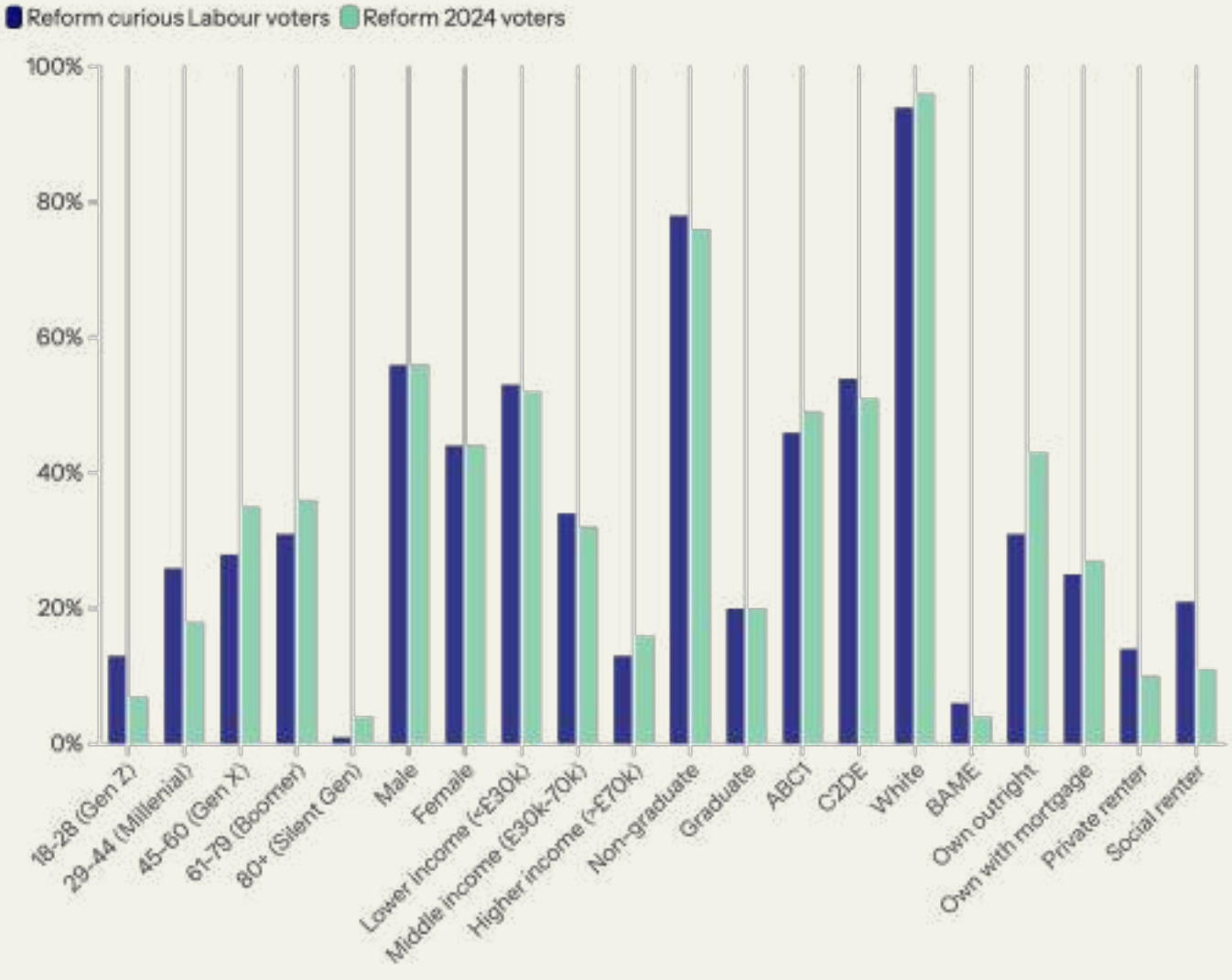
A basic look at the demographic profile of these voters reveals they actually look broadly similar to the wider Reform vote - and distinct from the Labour vote. That is, they are older - much more likely to be part of the Boomer (61-79) or Gen X (45-60) general - and far more likely to be working class (crudely, C2DE) or non-university educated. In this area, then, broadly held assumptions about this group are correct.

That said, there are some interesting differences to the Reform vote at the margins. Most notably, around 20% of Reform curious Labour voters are social renters (either in council housing or renting from a Housing Association), around twice the proportion of Reform voters or voters overall in the electorate who do. As we see later, this may shape some of their economic values and issue views.

The other thing that stands out is how much more likely these voters are to live in Scotland. As we saw in the previous section, Scottish Labour’s vote has a disproportionate number of these potential switchers. This itself is itself likely to be partly demographic, with Scottish Labour’s coalition being slightly older and more conservative than the wider UK Labour vote.

Looking deeper, a large number of Reform curious Labour voters in Scotland are likely to have been anti-SNP ‘tactical Tory’ voters at the last election.

Demographic profile of Reform curious Labour voters



YouGov for Persuasion UK, April 2025

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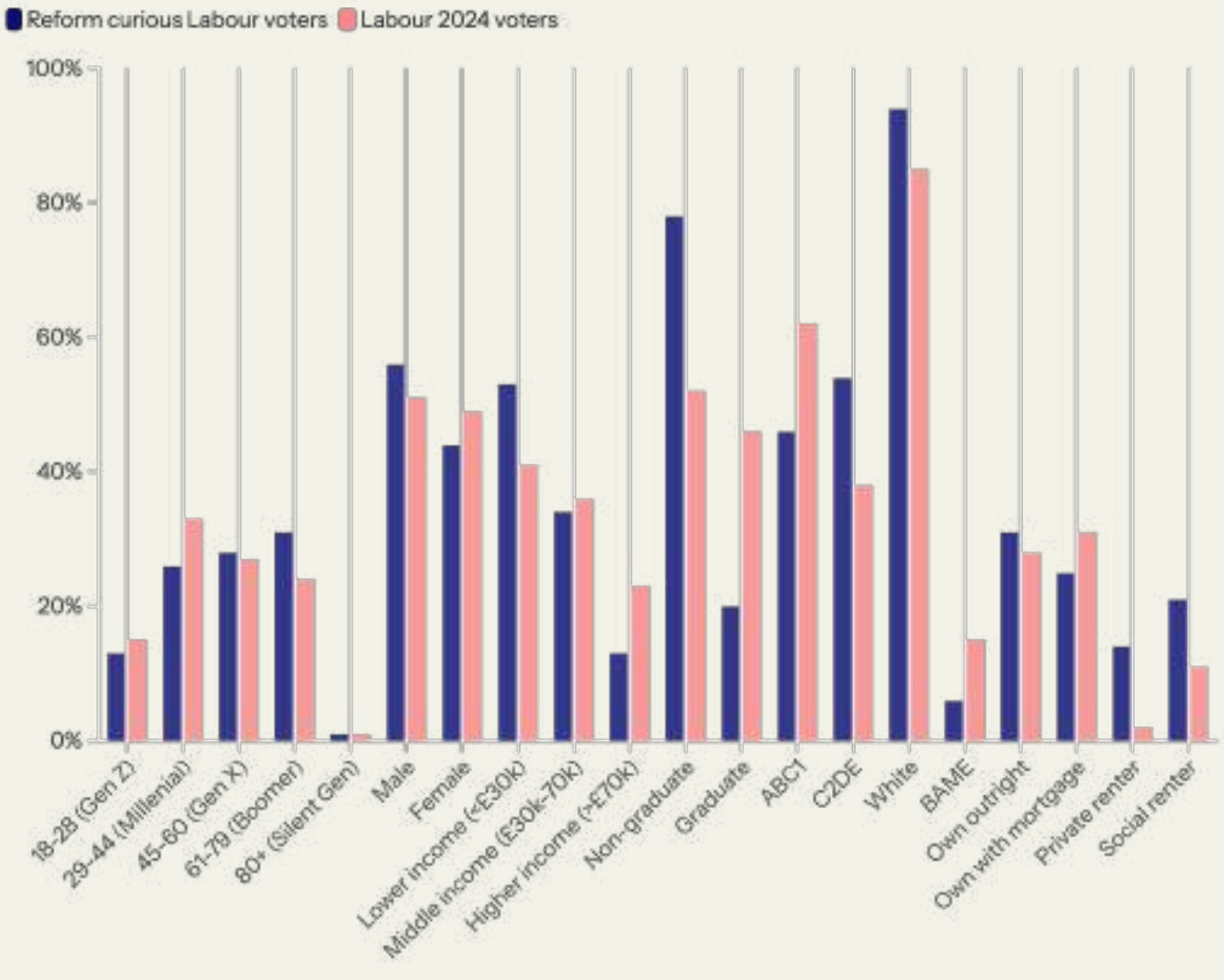
Demographic profile of Reform curious Labour voters



YouGov for Persuasion UK, April 2025

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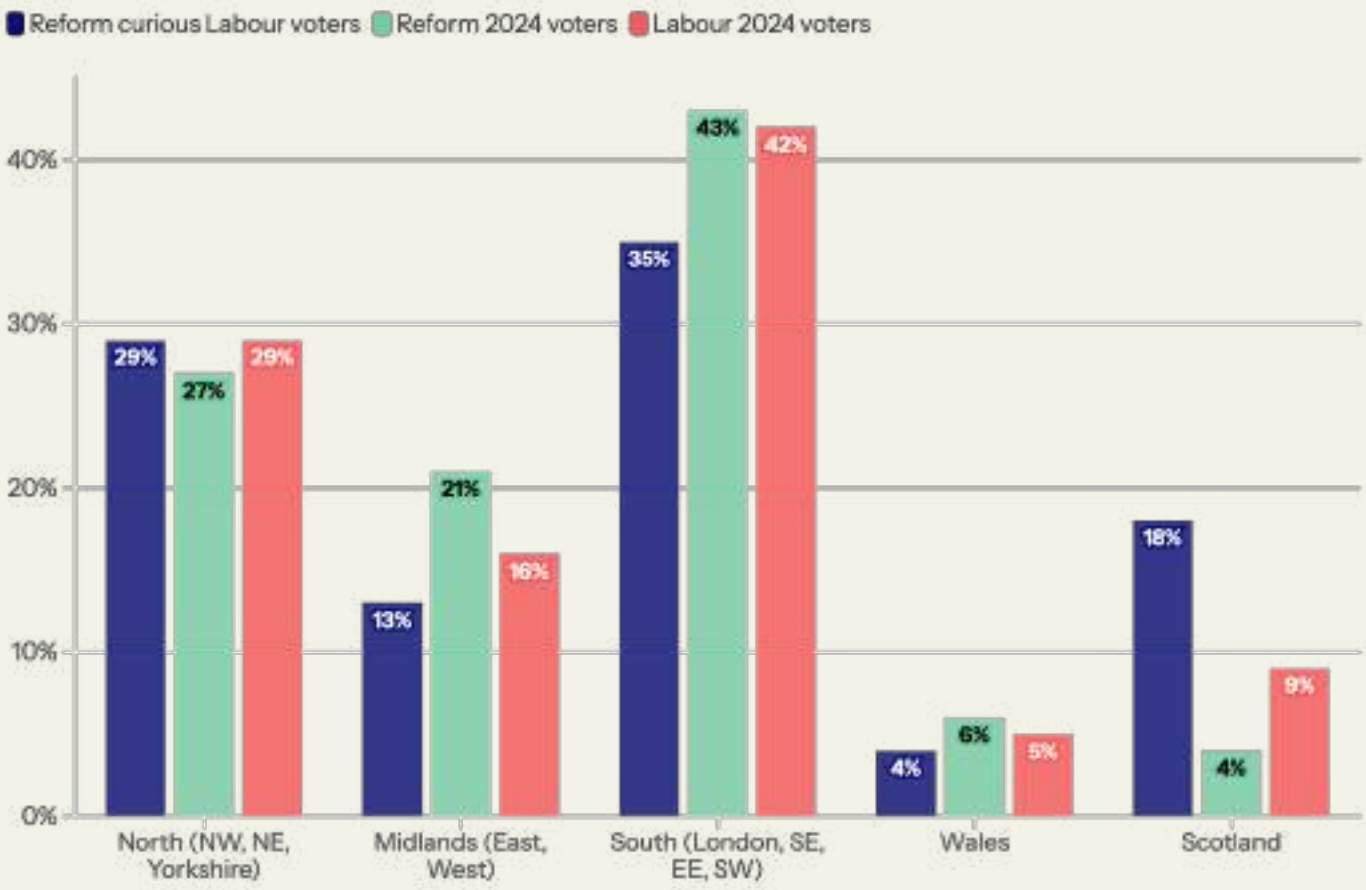
% of political group living in each part of the country



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Media consumption: where do these voters get their news?

While the BBC dominates as with wider votes, Reform curious Labour voters are disproportionately 'online' in terms of where they see or engage with politics related content. Facebook, where 37% of these voters regularly see political content, in particular over-indexes by a large amount compared to both Reform voters overall and voters-at-large. YouTube (25%), TikTok (17%) WhatsApp (12%) likewise. Broadcast sources like ITV and Sky News remain disproportionately important too.

Primarily though, it is the news sources they are less likely to consume which is the most interesting. Despite being Reform leaning, they are much less likely to consume GB News, the outlet closest to Reform as a party. Only 16% get news from GB News ((either directly or via online clips), compared to 37% of Reform voters.

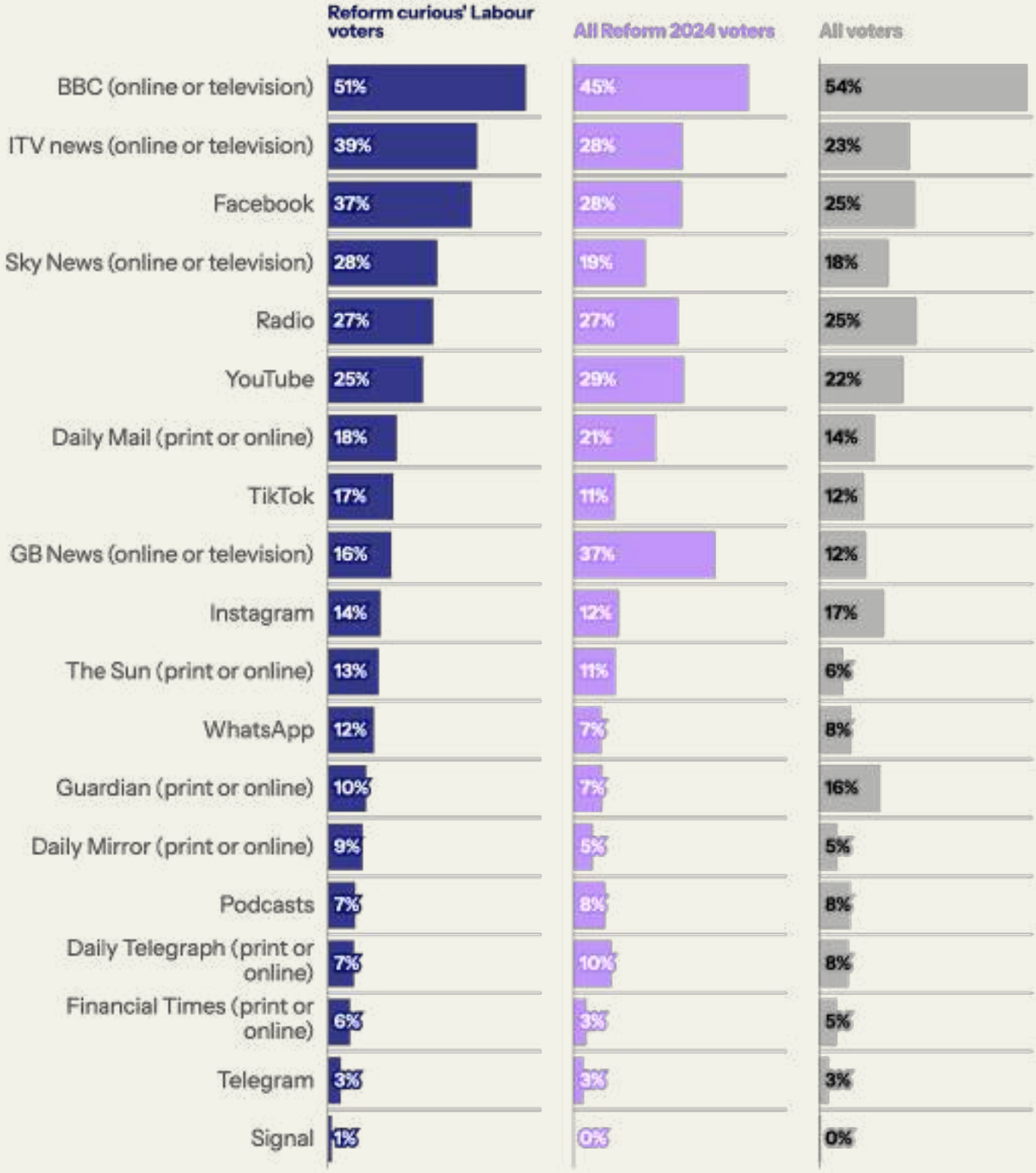
With the exception of The Sun, they are also less likely than wider Reform voters to read traditional right wing news sources.

This is, in fact, quite a revealing feature of Reform curious Labour voters. While they are a broadly small-c conservative group of voters, they tend to be much less intense in their conservatism and generally more moderate in their views. We will start to see this as we turn to look at their social values.

Media consumption of Reform curious Labour voters

This group are more likely than Reform voters or voters at large to get their news from online sources, especially Facebook, while they are also more likely to get news through ITV. They are notably less likely to get news from GB News.

"Through which of these media outlets and platforms, if any, have you seen or heard politics-related content in the last few days? This can be content of any nature. Tick all that apply."



Special focus: looking for so-called ‘fash youth’

The recent hit Netflix show ‘Adolescence’ brought mass attention to a longer running discussion concerning the radicalisation of young boys especially into radical right sub-cultures - in particular violent misogyny. Donald Trump’s successes with young voters, plus that of some European far-right parties, has given these debates an electoral edge, leading some to speculate about the potential for Reform to win votes among young men in this Parliament. Farage’s profile on TikTok provided as a further proof point.

However, as we see in the graph below, the actual evidence for such phenomena turning up in the UK electorate is so far mixed at best.

Propensity to vote Reform - or for a right of centre party generally - among men is still very strongly correlated with age, with Gen Z overall currently having the lowest level of such voting intent or propensity. Meanwhile, Gen Z men are much less likely than older generations to believe ‘feminism has gone too far’.[4]

One possible leading indicator, however, concerns Nigel Farage’s popularity. Here we do see - once you split Gen Z into two- the ‘u-shape’ in age-related attitudes some have sought out: that his popularity is slightly higher with men aged 18-21 than 22-28 or 29-44, bucking the overall age trend. However, the difference here is only around 5%, and leaves only around 20% of men aged 18-21 with a favourable opinion of the Reform UK leader. It will be important to monitor these trends as more young men come into the electorate, but for now any major generational differences seem relatively marginal.

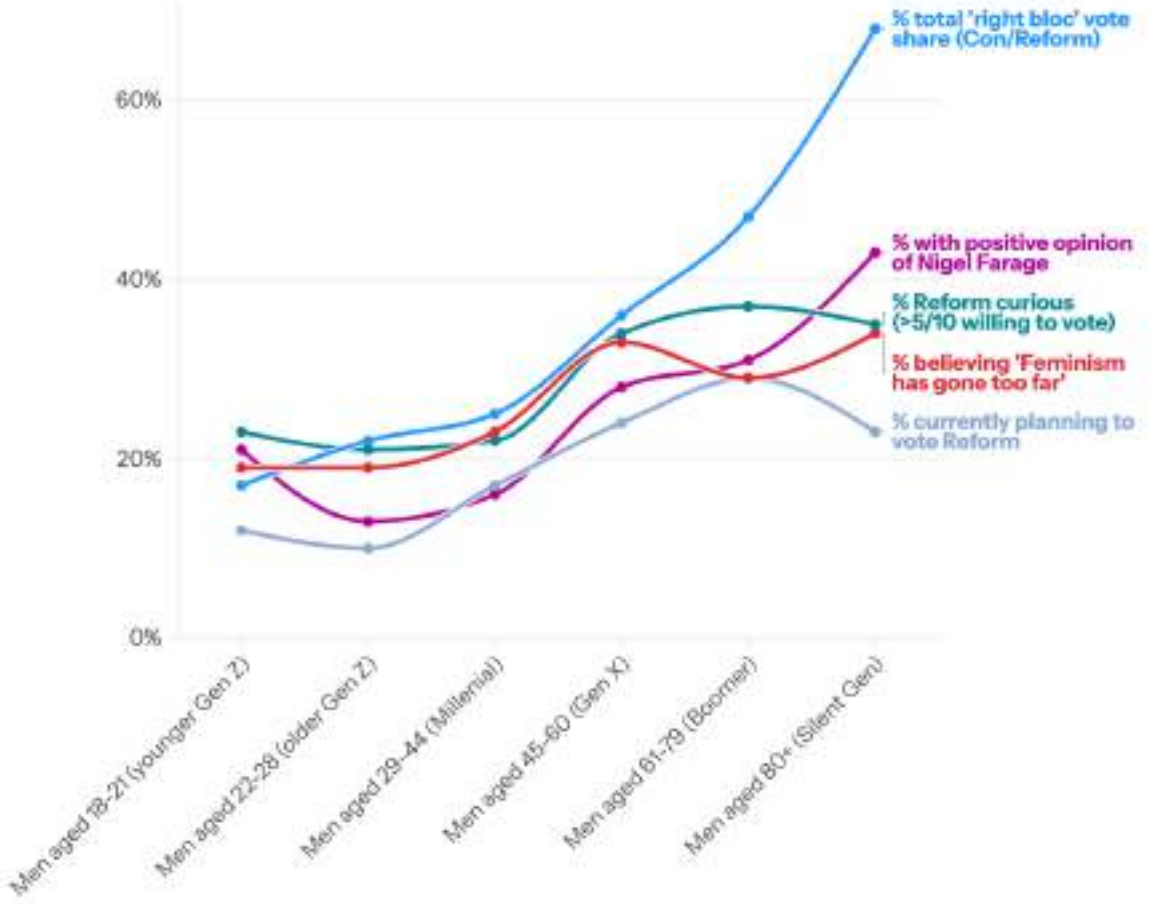
4 For further scepticism on this broader thesis, see this thread analysing age-related results from the 2024 general election.

Special focus: looking for so-called ‘fash youth’

How real is the phenomenon of 'fash youth' in the UK? A look at male attitudes by age

The evidence here is mixed at best. On the one hand, young Gen Z men are slightly more likely to have a positive opinion of Farage than their older generational counterparts, but both Reform voting intent and 'right voting' is very low among Gen Z generally. Gen Z also have the lowest levels of belief in anti-feminist sentiment.

Data for men by generation, with younger and older Gen Z split out



YouGov for Persuasion UK, April 2025.
Anti-feminist sentiment judged by paired statement: "Where would you place your view and the view of these parties on this scale? The fight for feminism and women's equality in Britain has not gone far enough – there are still many battles to be won" OR "In general, feminism has gone too far in this country and has had negative effects on Britain"

Persuasion UK

Section 3: Exploring the social values of Reform curious Labour voters

Cultural vs economic axis

While demographically quite similar, when we look at values we start to see Reform curious Labour voters are somewhat more 'cross pressured' than both Reform voters overall, Labour voters overall and the left end of the 2024 Labour coalition, with whom Labour need to balance this group with.

How we approached this

To get at this, we asked respondents a range of 'paired statements' where they are asked to choose between two opposing views.[5] These are designed to surface respondent's broad values, with them being asked which of these they agreed with most, even if none captures it exactly (there was also a 'neither' and 'don't know' response option).

The full issue set was broken down on what we can broadly think of the 'cultural axis' (liberal to conservative) and 'economic axis' (left/egalitarian vs right/laissez faire). Specifically:

Cultural axis

- These days, white people have more advantages in society than non-white people **OR** These days, non-white people have more advantages in society than white people

5 These are notably more reliable than 'agree/disagree' questions which can notoriously create agreeability bias among less-engaged respondents. They were asked over two waves of research via YouGov, one in January 2025 and the other in April 2025.

- We should not reintroduce the death penalty, even for people convicted for the most serious crimes **OR** We should reintroduce the death penalty for people convicted of the most serious crimes

- Britain should not leave the European Convention on Human Rights, and should keep human rights legislation in place, even if it restricts what government can do to reduce immigration **OR** Britain should leave the European Convention on Human Rights and repeal relevant human rights legislation if it helps to increase what government can do to reduce immigration

- Immigration has enriched society **OR** immigration has undermined society

- Government should take greater action to reduce the UK's greenhouse gas emissions, even if that causes some inconvenience or cost to ordinary people in the short-term **OR** Government should NOT take action to reduce the UK's greenhouse gas emissions if it is going to mean cost or inconvenience for ordinary people – even if that means missing climate change targets

- The fight for feminism and women's equality in Britain has not gone far enough – there are still many battles to be won **OR** In general, feminism has gone too far in this country and has had negative effects on Britain

Economic axis

- The NHS should remain publicly funded and free at the point of use **OR** The NHS should move to an insurance-based model, like that in other countries.

- We should tax the wealthiest people in society more **OR** We should not tax the wealthiest people in society more

- Employers and landlords have too much power over workers and tenants **OR** Employers and landlords do not have too much power over workers and tenants

- In general, it is usually in the interests of ordinary people that there is MORE regulation placed on businesses **OR** In general, it is usually in the interests of ordinary people that there is LESS regulation placed on businesses

- The UK should have closer economic ties with the European Union to help boost economic growth, even if that means giving up ultimate authority on rules and regulations in some areas **OR** The UK should NOT have closer economic ties with the European Union if it involves giving up ultimate authority on rules and regulations in some areas, even if that involves some economic cost to the UK

- Overall, Britain having more millionaires and billionaires would be a bad sign for everyone else – they are probably getting rich at other people's expense **OR** Overall, Britain having more billionaires would be a good sign for everyone else – they are probably getting rich creating something of value that benefits the wider economy

- Right now, the priority should be investing in front-line public services – even if that means raising taxes on ordinary people **OR** Right now, the priority should be cutting taxes on ordinary people – even if that means cutting spending on front-line public services

Other/populist axis

- Most of our politicians go into politics looking to improve society **OR** Most of our politicians go into politics mostly for personal financial gain

- We should increase military aid and support to Ukraine in their fight against Russia **OR** we should decrease military aid and support to Ukraine.

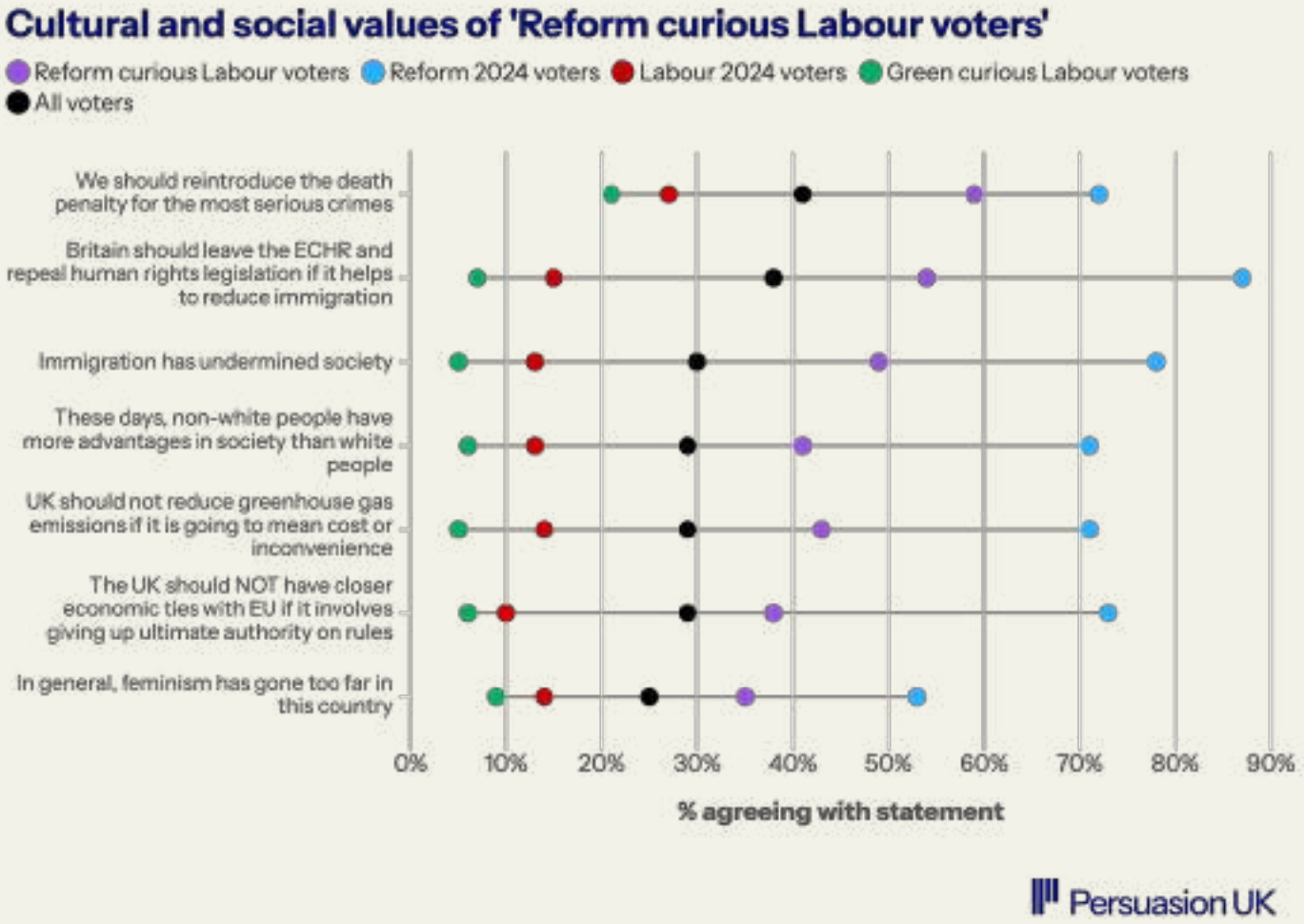
Results

Below first are the results on the cultural axis, looking just at the percentage of those who agreed with the more conservative statement.[6]

On cultural values, potential Reform to Labour switchers are definitely more socially conservative than the average UK voter and the Labour base. They do, however, wear this social conservatism a little more lightly, being less intense in their agreement that the UK should leave the ECHR for instance.

6 For ease of visualisation, we are just showing those who opted for the socially conservative response option. We have excluded from the sample the small number of voters who opted for the 'don't know' response option.

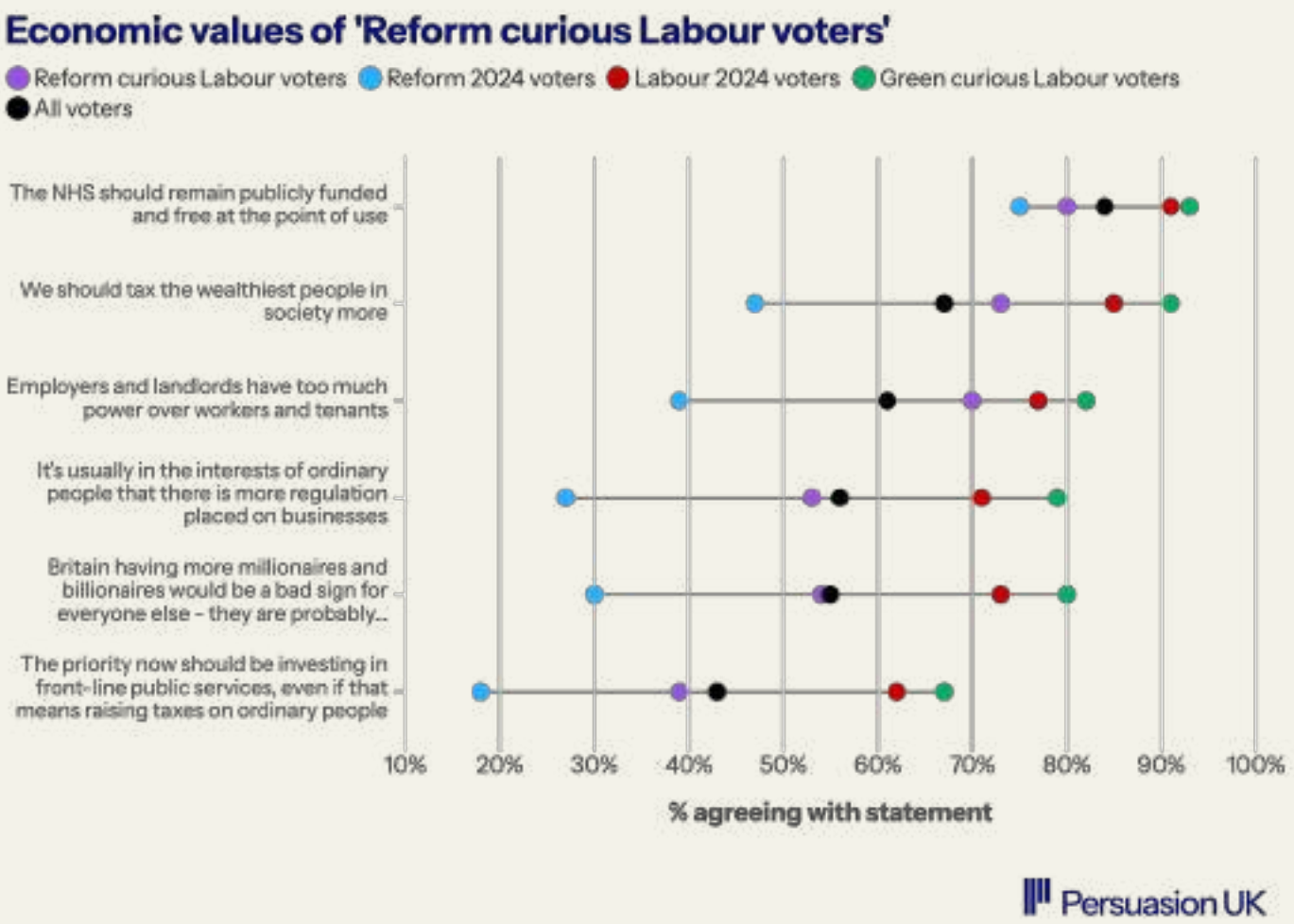
But they show particular closeness with the wider Reform vote on the classic cultural divides of immigration, the death penalty and racial discrimination.



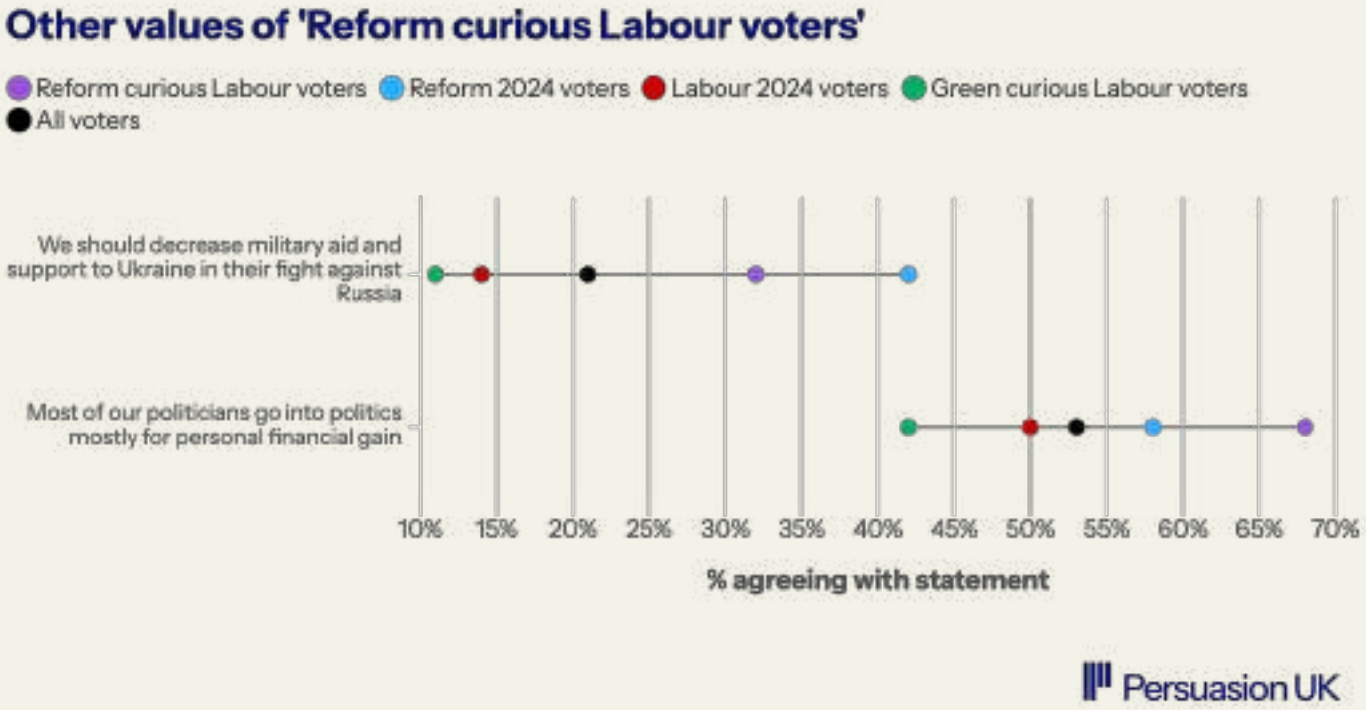
It is on the economic axis, though, where we see the reverse trend. Especially on questions of power and economic populist sentiment, Reform curious Labour voters are consistently more left-wing than the Reform vote, being broadly aligned with the Labour vote on these questions.

One of the few exceptions is tax rises on ordinary people to pay for public services, where they are more divided - but still far more open to it than the wider Reform vote.

On closeness to Europe at the expense of sovereignty, they are also evenly divided, probably because this issue is also strongly culturally coded.



Looking beyond these values, it's notable that Reform curious voters go beyond even the core Reform vote. This is a more disaffected and disillusioned streak to these voters that we will see in future sections, lending itself well to an anti-system or anti-politics insurgent party like Reform.

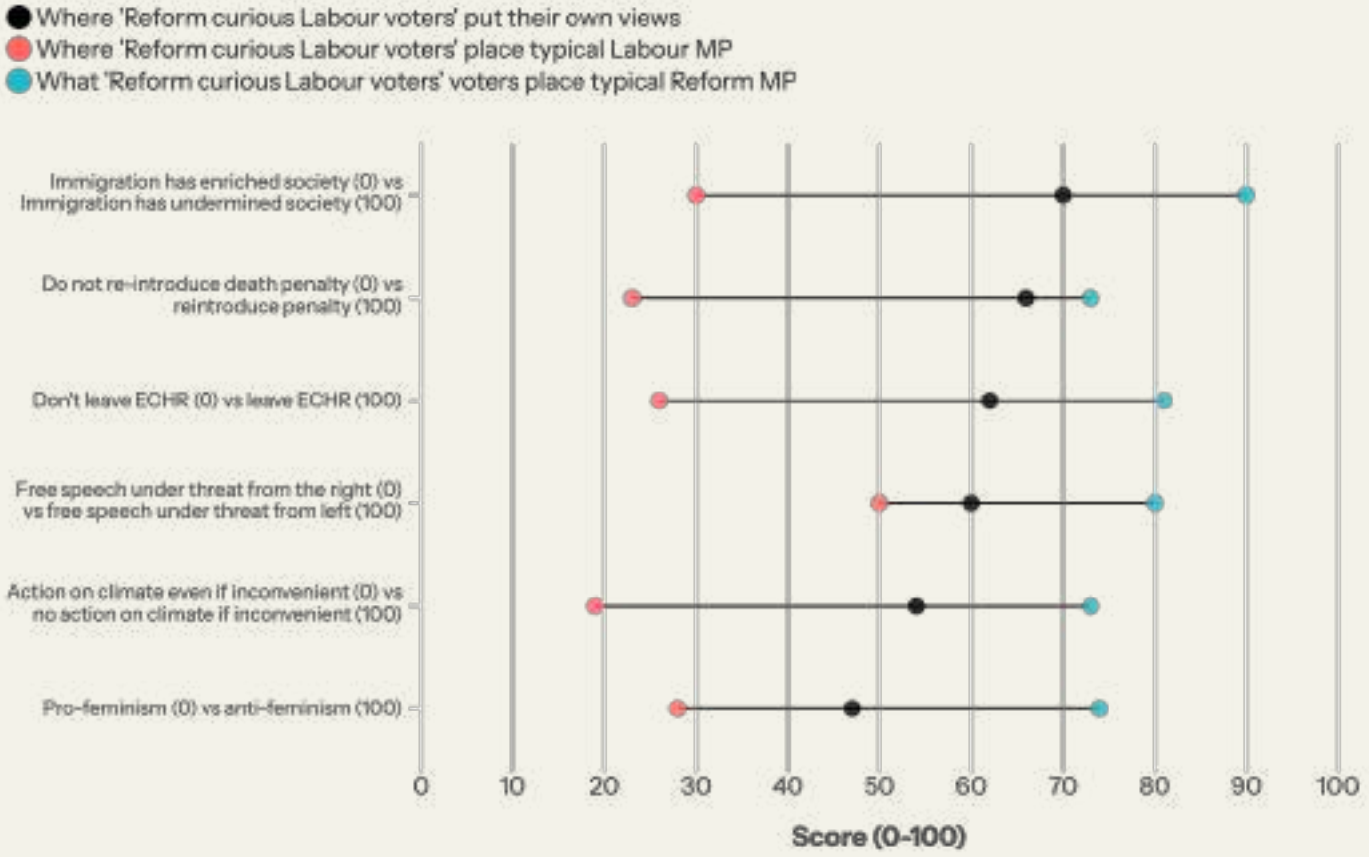


An important question for political parties in seeking to take advantage of these dynamics is whether target voters credibly see those parties as representing certain values. A party may wish to capitalise on perceived closeness on certain issues, or try to change their image if perception gaps are deemed a problem.

Here we can see that Reform curious Labour voters put themselves to the left of both Labour and Reform on several questions relating to economic power and taxation of the richest. They generally are aware that Reform have similar cultural values as they do. It is more mixed on economics, where on some populist questions (for instance, regulation of employers and landlords) they think Reform share their values, but seem to be less sure - or sure they do not - on other economic questions (NHS, the value of millionaires/billionaires). This speaks to the fact Reform are clearly defined culturally in these voters minds, but less so on issues beyond the likes of immigration and Net Zero.

Where do Reform voters place the values of other parties?

Cultural axis questions. 0 is most liberal position possible, 100 most authoritarian.



To get a 0-100 score here, we excluded 'don't knows' and 'neither' for both own view and party vote. Value represents average score.
"Where would you place your view and the views of these parties on this spectrum?"

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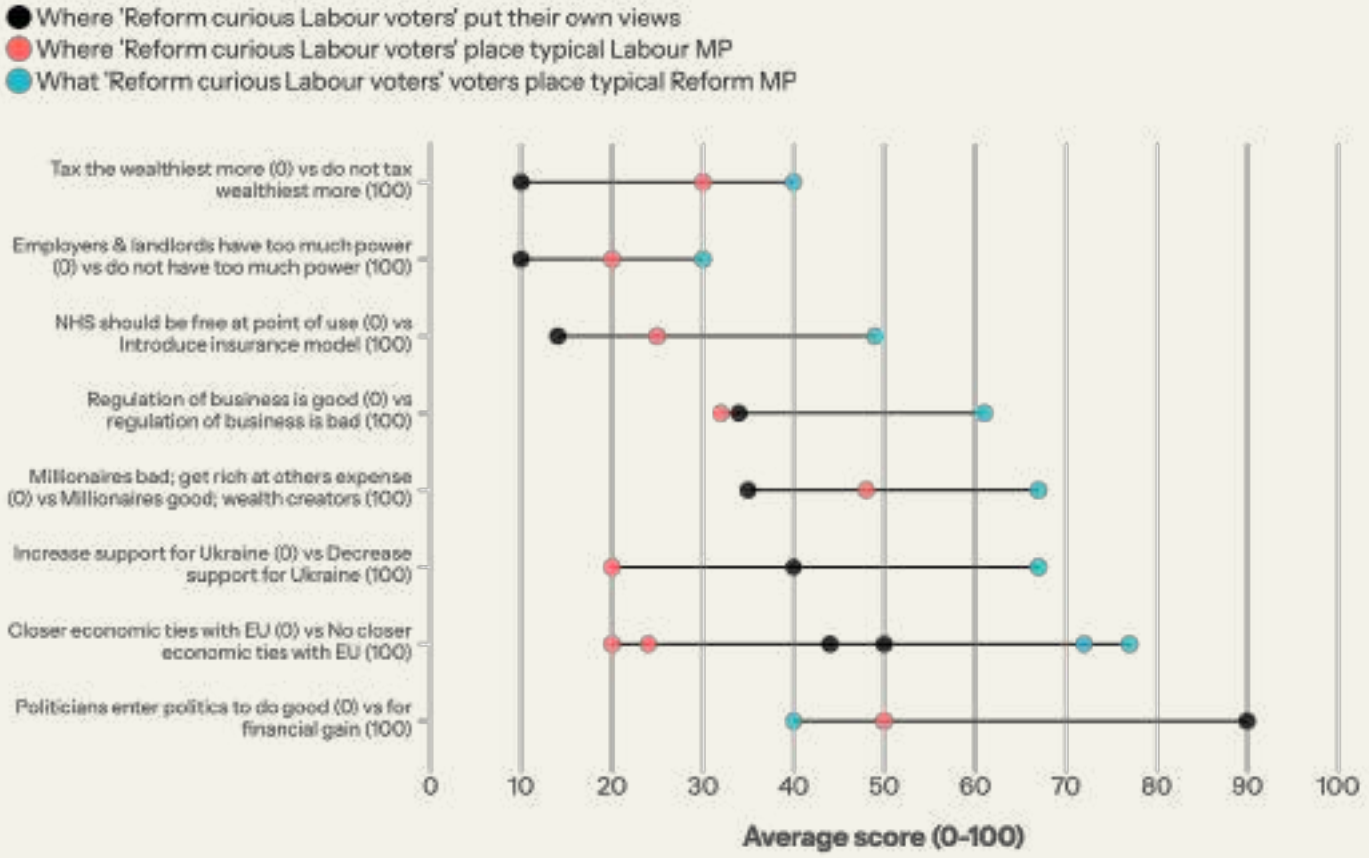
Where do Reform voters place the values of other parties?

Economic axis questions & other. 0 is most left wing score possible, 100 most right wing.



To get a 0-100 score here, we excluded 'don't knows' and 'neither' for both own view and party vote. Value represents average score.
"Where would you place your view and the views of these parties on this spectrum?"

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Who do Reform curious voters like, and who do they want to be tougher on?

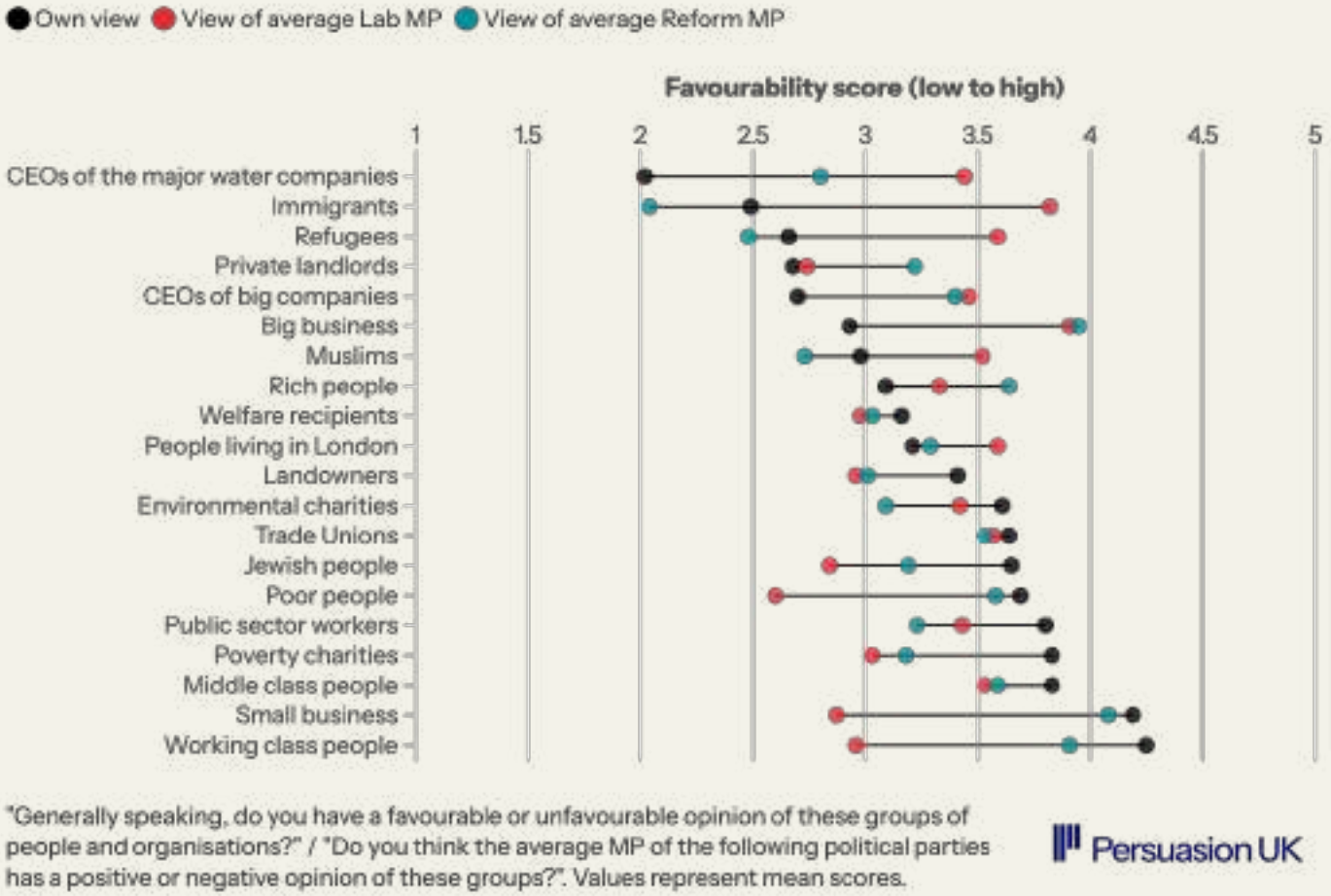
This particular group of voters' slightly cross-pressured, or socially conservative and economically left-wing, values are on show when we analyse what groups in society they like and dislike. At the same time, we ask what they think the view of the average Labour and Reform MP is by comparison.

As predicted by their values, Reform curious Labour voters have generally negative views of migrants and refugees - but also CEOs of big companies, especially the major water companies, who are the most unpopular group tested here. Reform are seen as closer to these voters' views than Labour here.

Some of the wider brand challenges Labour has come through here. The biggest difference in perception comes from ‘small business’ and ‘working class people’, both of which Reform curious Labour voters feel Labour have a more negative opinion on than them . They are also seen as closer to big business than these voters' own views. We also see the lingering impact of the anti-semitism crisis within Labour.

Which groups do Reform curious Labour voters like and dislike, and which groups do they think Labour and Reform MPs like and dislike?

Scale: 1 highly unfavourable, 2 favourable, 3 neutral, 4 favourable, 5 highly favourable. Score here represents average on this scale.



"Generally speaking, do you have a favourable or unfavourable opinion of these groups of people and organisations?" / "Do you think the average MP of the following political parties has a positive or negative opinion of these groups?". Values represent mean scores.

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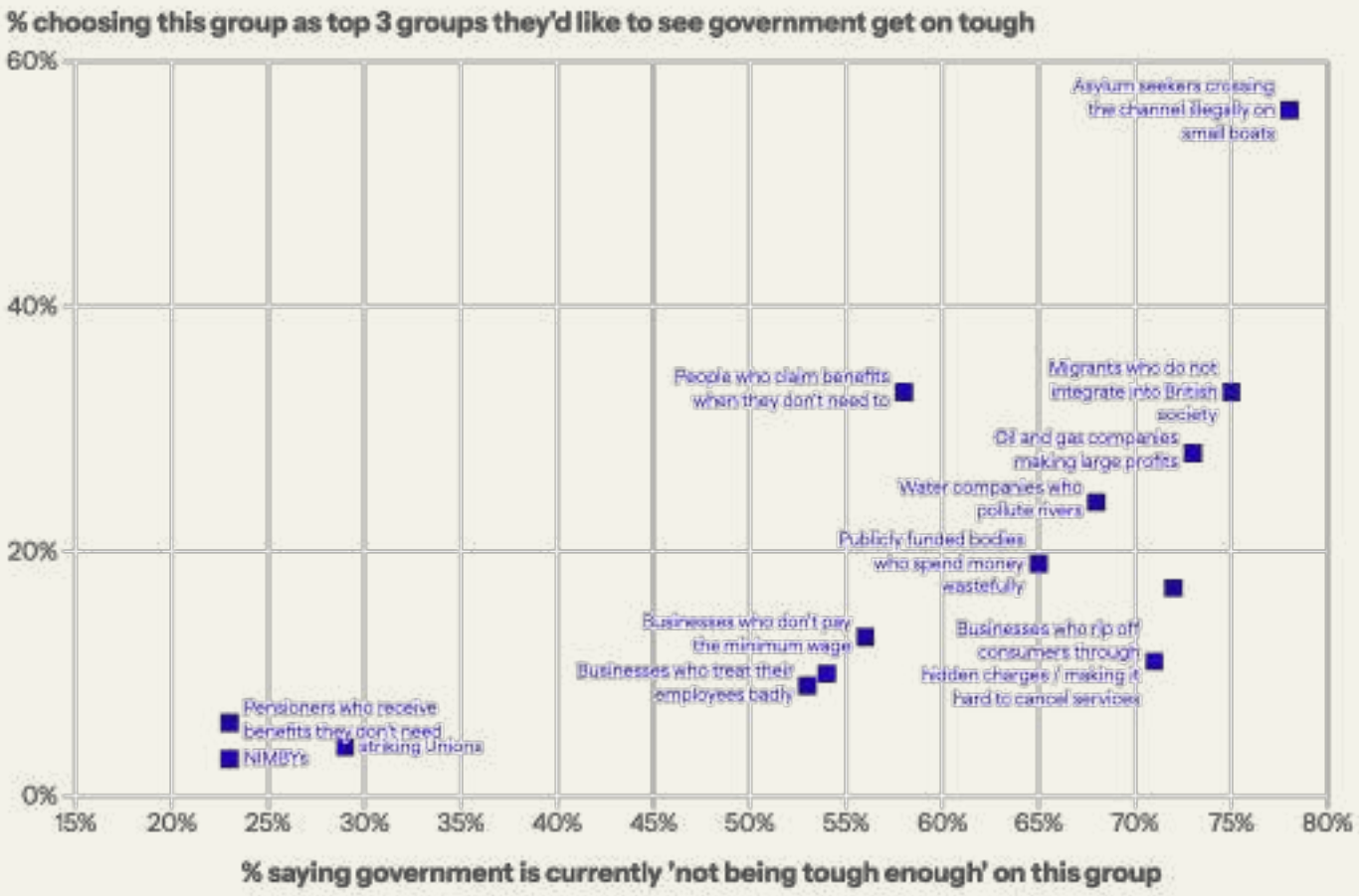
We see similar patterns when we ask them what groups they would like to see government be tougher on than they are now, with those arriving in small boats joined by oil and gas companies at the top of the list.

Who would Reform curious Labour voters like to see government be tougher on?



"Sometimes people talk about governments being 'tough' on groups within society. If you had to prioritise, which of the below groups would you most like to see the Labour government be tough on? Pick select up to three options." // "And based on what you've seen in the news or elsewhere, is the government being too tough, not tough enough, or getting about the right balance on the below groups or not?"

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Section four: The issue agenda - what is pushing and pulling these voters to and from Reform?

In the previous section, we saw that 'Reform curious Labour voters' are cross-pressured in their values: that is, they have socially conservative social values but are economically populist on economics.

In this section, we can see that it is largely their social values which are currently more salient to their vote. Although, once again we find the picture slightly more mixed than with the wider Reform view.

Push factors to Reform

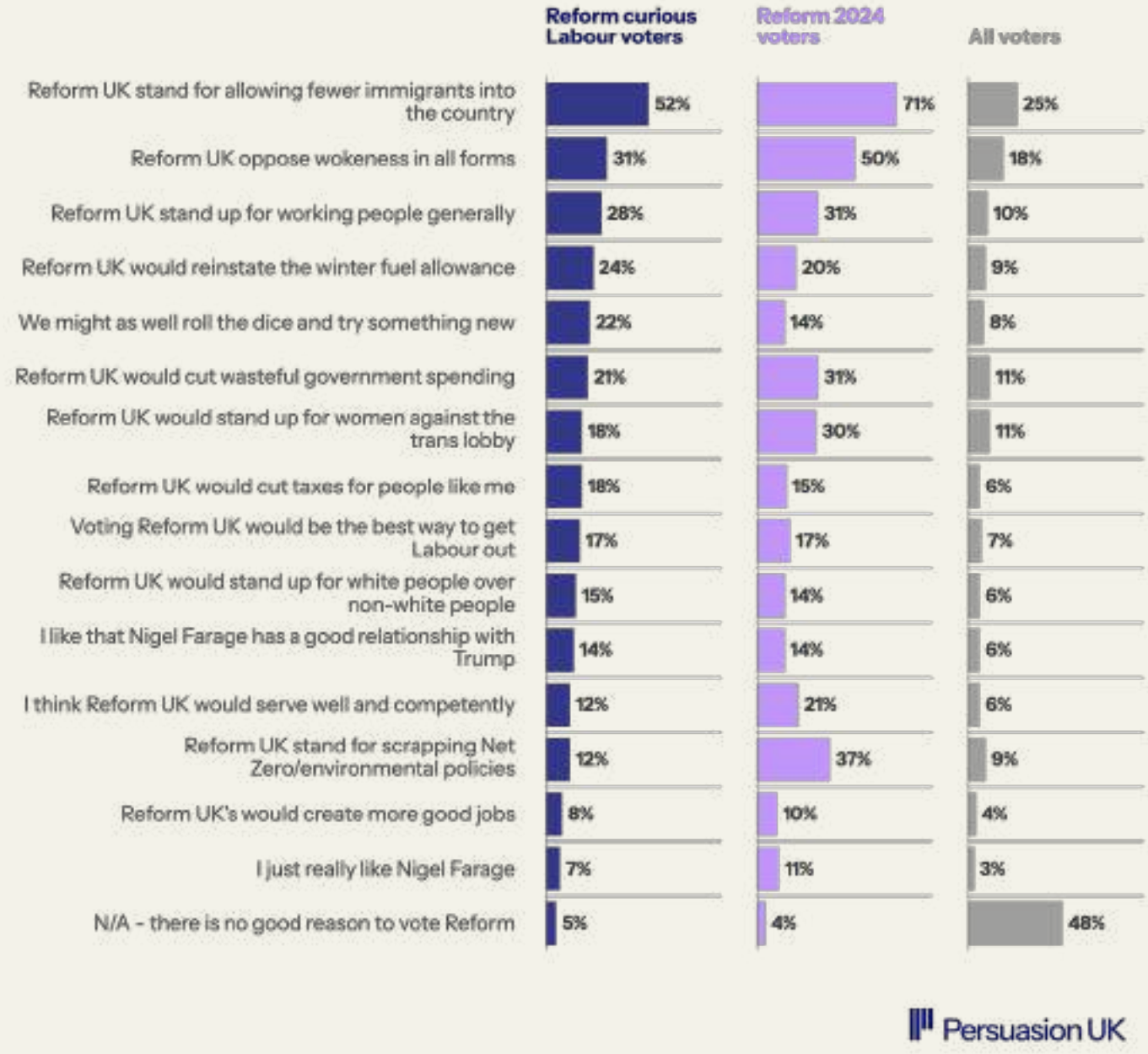
First of all we provided respondents with a list to vote Reform, and reasons not to. Then we did the same for Labour.

For these target voters, the top two self-reported pull factors to Reform are the same as for the wider Reform vote: the party's clear stance against immigration and 'wokeness'.

Reasons to vote Reform

Immigration dominates here but less intensely than with Reform voters at large. Reform curious Labour voters are more likely to say 'we might as well roll the dice' or raise economic issues. They are much less likely to be attracted by Reform's stances on Net Zero , trans people or anti government waste.

"Below are some reasons that other people have put forward in favour of voting "for" Reform UK at the next general election. Which do you personally find most convincing? Please choose up to five"



Beyond that, there are some notable differences. There is more of a sense among the Labour portion of the Reform vote that 'we might as well roll the dice, we've tried everything else' - this is the slight anti-political nihilism we observed in the previous section.

Perhaps the most striking difference, however, concerns Net Zero. While Reform's anti-Net Zero stance is a big vote winner among their base, it simply is not among 'Reform curious Labour voters', who tend to be broadly supportive of Net Zero, even if they prioritise it less than the wider Labour coalition. There is more on this, including speculation on why, in the 'issue focus' part of this section.

There is something similar, albeit less pronounced, when it comes to Reform's anti-trans rights - or gender critical - positions. It is distinctly mid-table with Reform curious Labour voters, while being in the top 6 reasons for Reform voters.

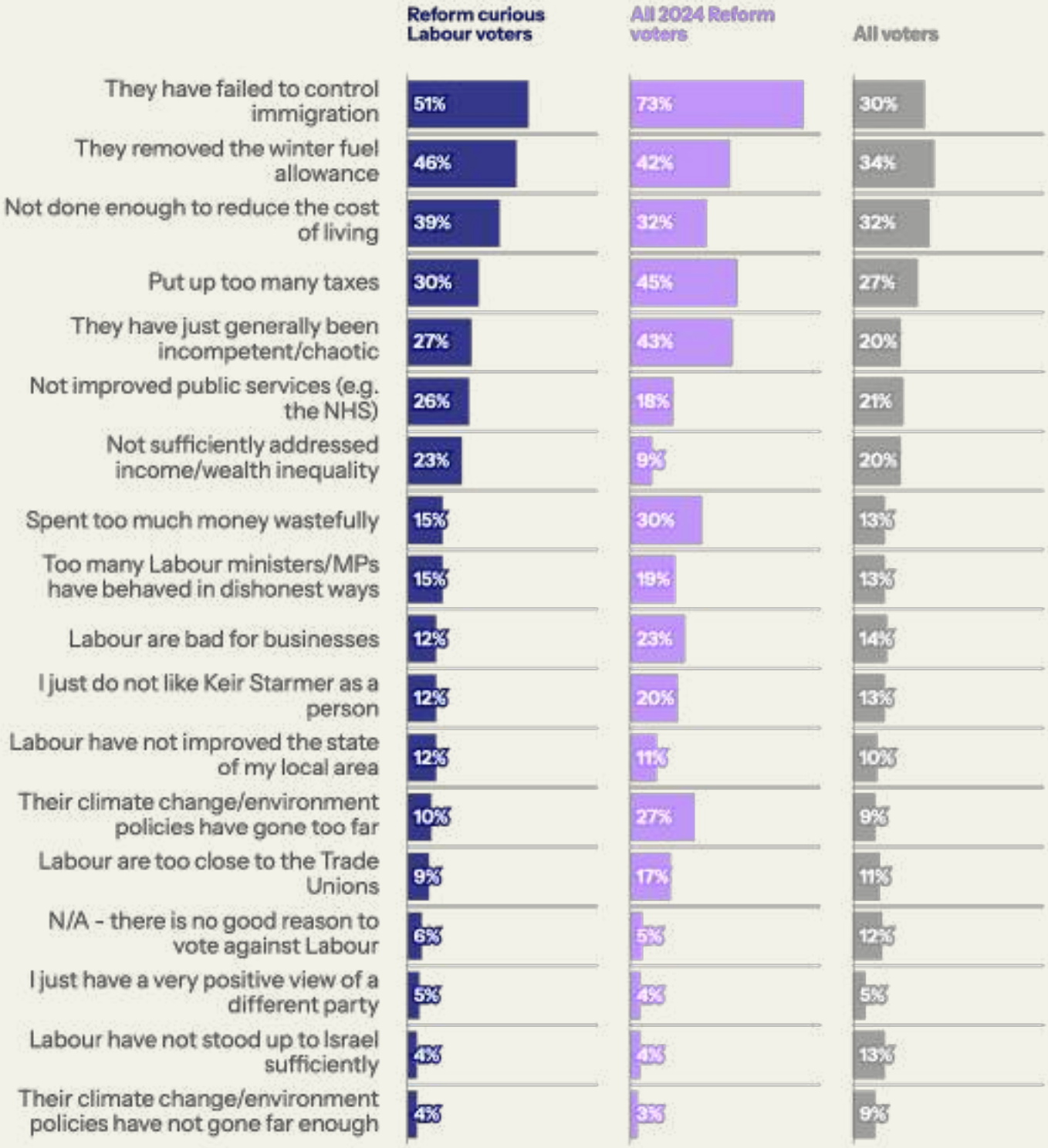
In addition, Reform curious Labour voters are less drawn to 'DOGE-style' opposition to government waste than the Reform base - something which generally reflects their more statist values.

In terms of what Labour is doing to alienate these voters, immigration comes top again, but economic factors are more in the mix than with the wider Reform vote. The decision to cut winter fuel allowance as well as a general dissatisfaction with the cost of living and NHS over-index here. This is a sign of Labour inheriting the anti-incumbency penalty that comes with presiding over these long-running problems.

Reasons to NOT vote Labour

Immigration tops this list, although there's some interesting over-indexes vs the broader Reform vote - notably on economic issues (winter fuel allowance, cost of living, inequality)

"Below are some reasons that other people have put forward in favour of voting "against" Labour at the next general election. Which do you personally find most convincing? Please choose up to five."



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Pull factors from Reform

What are the reasons that Reform curious Labour voters might hesitate in voting Reform?

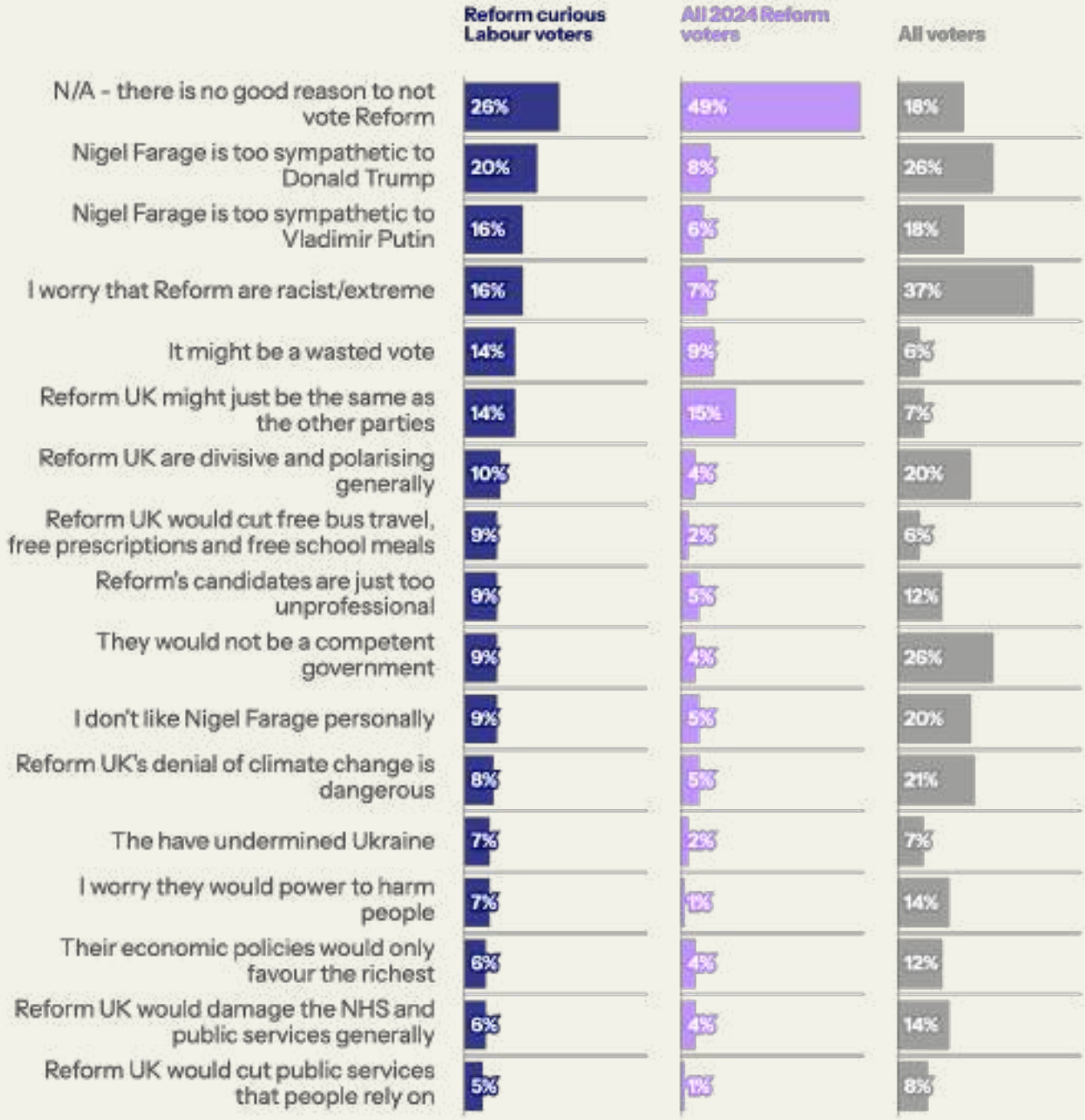
For 26% of them, they have no hesitations at all - reflecting that a decent number are already well on their way to permanent defection.

For others, concern is spread over a number of issues but chief among them are Farage's proximity - or perceived proximity - to unpopular figures, first among them Trump. In the same way as this is proving a weakness for Conservative leader Pierre Polivere, it is a potential liability for Farage with these target voters. Trump in general is an issue that splits the Reform vote between its more radical and moderate flank, as we also see below. In reality, very few British voters have a positive view of him.

Reasons to NOT vote Reform

The high % for 'there is no good reason' reflects that many of these voters have already switched to Reform and are fairly set in their views, but Trump and Putin is a clear weakness as are lingering doubts about racism - or at least far more so than for core Reform voters.

"Below are some reasons that other people have put forward in favour of voting "against" Reform UK at the next general election. Which do you personally find most convincing? Please choose up to five."



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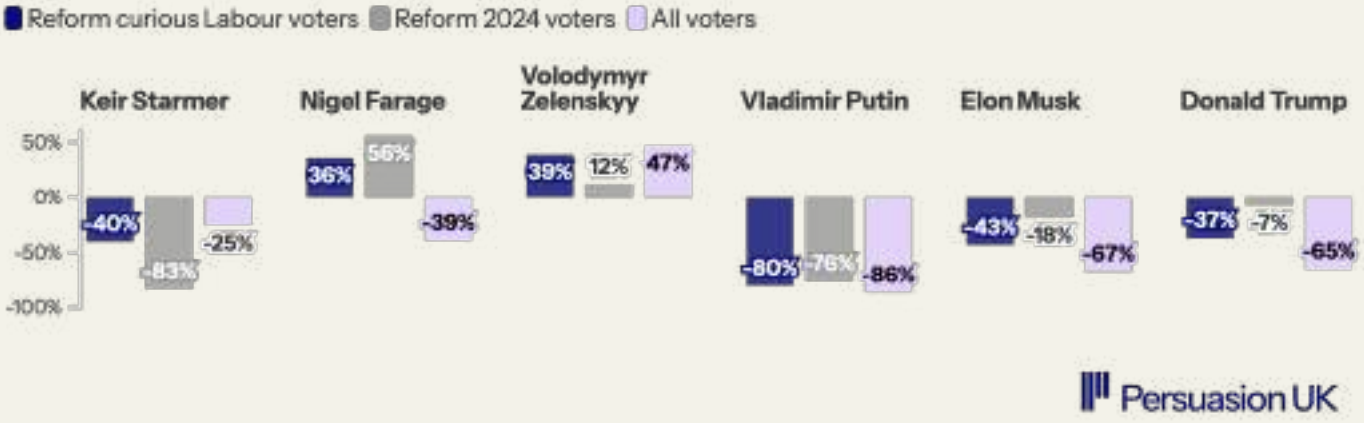
Views of leadership figures

Reform curious Labour voters are much more unambiguously anti Trump and anti Musk. Trump especially divides the Reform vote down the middle.

"Do you have a positive or negative opinion of the following politicians?" (showing net positive, all those with a positive opinion minus all those with a negative opinion)



Part of what we are seeing here is a lingering ambivalence over whether Reform is an 'extreme' party or not, as we see in hesitation number 3. While these voters show strong discontent on the issue of immigration and asylum, as Labour voters they do not necessarily explicitly identify as radical right voters.

Elsewhere, Reform are perceived by some to be pro-Russia, which is perhaps a legacy of Farage's previous missteps on the topic of Ukraine.

In terms of dogs that don't bark, while - as we saw in the previous section - they do not share Reform's views on the role of the state or public services, this is not currently showing up as a salient concern with Reform curious Labour voters.

When asking these voters reasons to vote Labour, a third could not think of any. Starmer's performance on Ukraine is an asset, as is Labour's reputation as the party of the NHS - but the main thing they have going for here is sympathy at the situation they inherited from the Conservatives.

Reasons to vote Labour

A general sense that Labour inherited a mess is about as good as it gets for the party here - though the lower proportion of Labour curious Reform voters saying 'there is no reason' highlights again how deeply held anti-Labour sentiment is among Reform voters at large compared to this group

"Below are some reasons that other people have put forward in favour of voting "for" Labour at the next general election. Which do you personally find most convincing? Please choose up to five."

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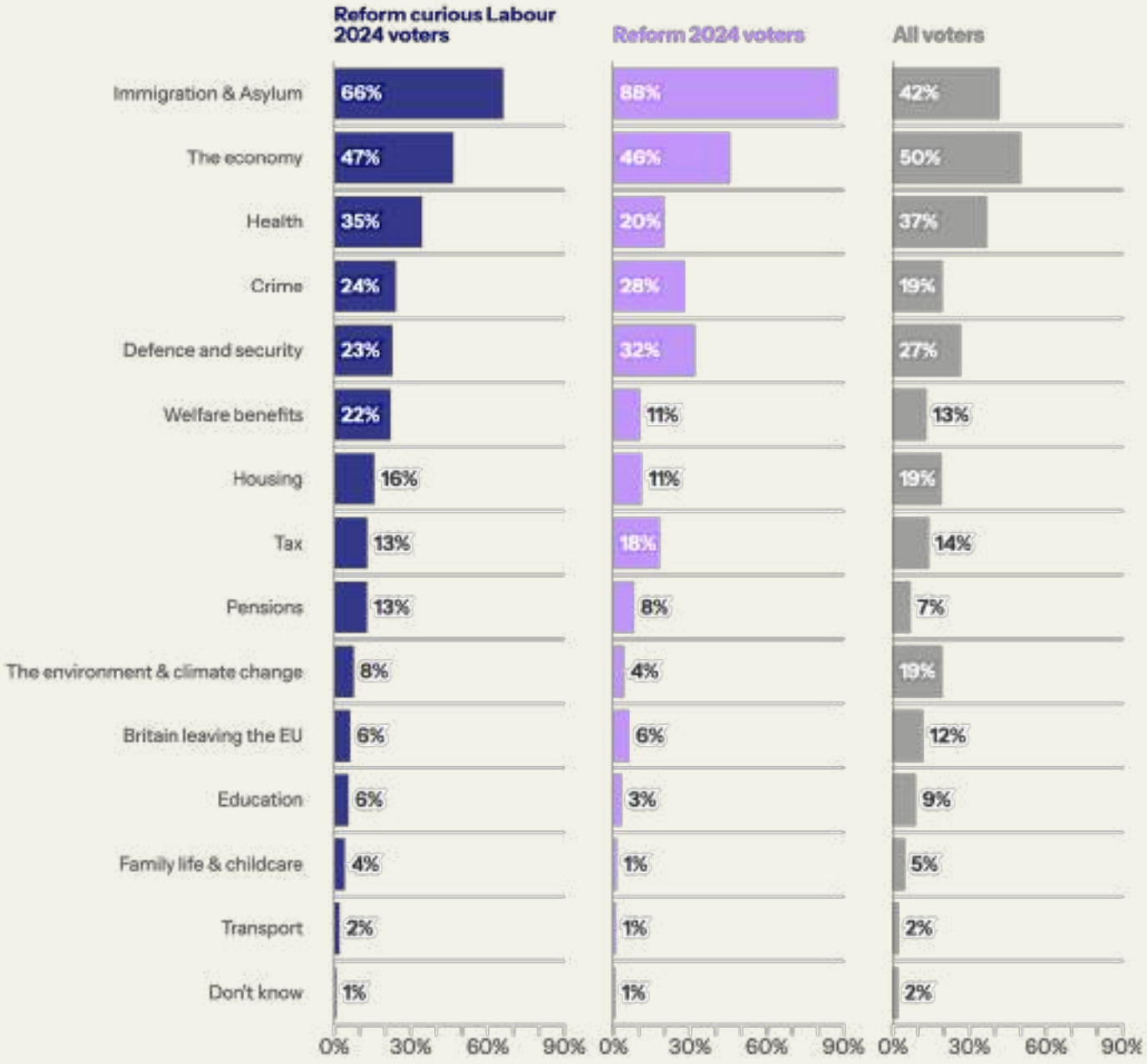
Within-issue salience

While the issues that Reform curious Labour voters' choose as the main challenges facing the country broadly reflect those we saw above, digging into certain issues provides some extra insight.

Issue salience: top issues facing the country

"More specifically, which of these do you think are the most important issues facing the UK at this time?"



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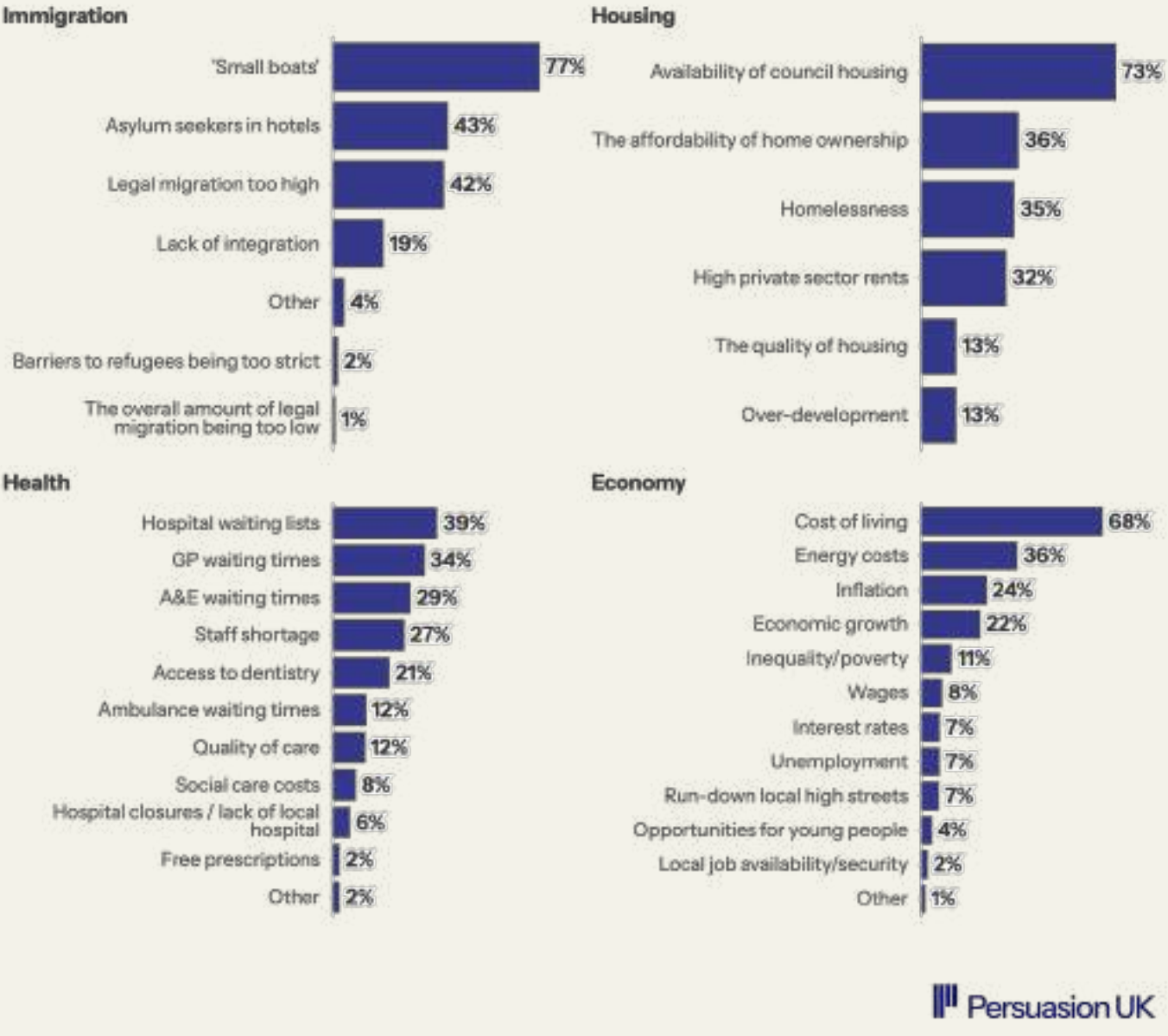
For instance, among those choosing ‘immigration’ as a top issue, this matter is in practice dominated by the spectre of asylum and undocumented migration, not legal migration. The issue of small boats and ‘asylum hotels’ (temporary accommodation for asylum seekers awaiting processing) are the top 3.

Within those choosing health, waiting times of all kinds pre-dominantes.

Interestingly, council housing is the main concern for Reform curious Labour voters who are worried about the issue of housing. They are about twenty percentage points more likely to choose this as their top housing concern than Reform voters overall, and twenty four points more than voters-at-large (in general, these last two groups tend to opt for ‘affordability of home ownership’ as the top housing issue). This reflects what we saw in the demographics section of this paper, with Reform curious Labour voters more likely to have experienced being a social renter.

What is the meaning of different 'top issues' to Reform curious Labour voters who pick them as priorities for the country?

"And when it comes to [issue previously chosen as top issue], which of these are the most important issues facing the UK? choose up to 2"



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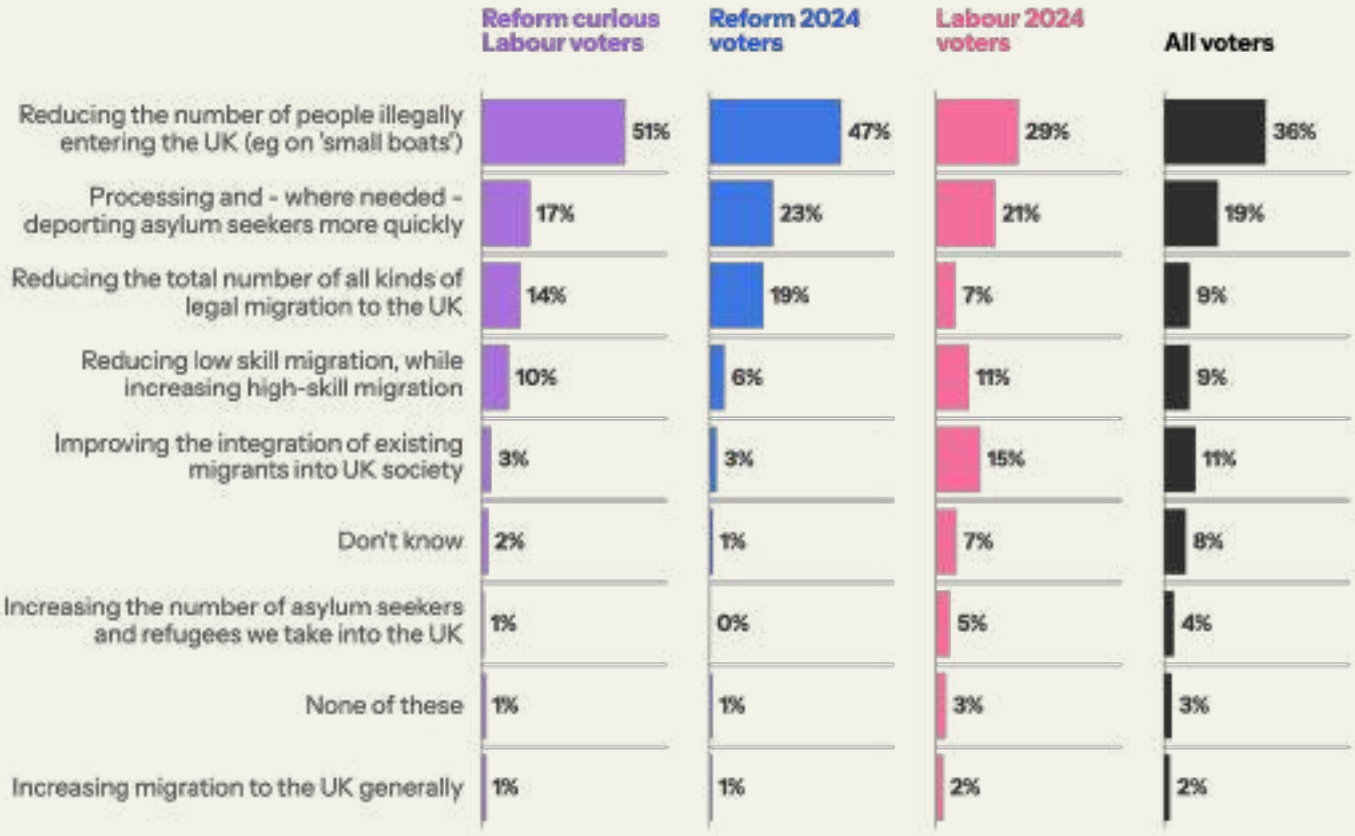
"On the issue of immigration and asylum, which of the following policy outcomes would you personally most like to see achieved? Choose only one"



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Issue focus: Net Zero

Since Labour's election victory in July 2024, there has been an escalation in media scepticism on the topic of 'Net Zero', the UK's transition to clean energy.[7] This has prompted some to speculate that the government's commitment to the green transition could provide an opening for Reform to take Labour voters.

We found essentially zero evidence for this in the course of our analysis of 'Reform curious Labour votes'.

While Reform voters show consistently hostile attitudes to Net Zero, Reform curious Labour voters do not. It is one of the most notable distinctions between the two, in fact.

Firstly on the brand of Net Zero itself, Reform curious Labour are positive while Reform voters are not. This brings them in line with the wider public, explained mostly by the threat perception of climate change and a latent environmentalism in most British voters.

This is further evident when we ask voters who they blame for rising energy bills and low economic growth, which anti Net Zero voices have pinned on that cause. This shows up with the Reform base, but is nowhere to be seen among Reform curious Labour voters - who, like the rest of the public, tend to blame profiteering by energy companies or the UK's dependence on imported gas when it comes to rising bills.

These discrepancies are perhaps a function of Reform curious Labour voters differing news consumption to Reform voters - swearing off GB News especially - which itself a sign of their less intense social conservatism.

There is one caveat here, concerning salience. The best way of understanding Reform curious Labour voters' attitudes here is one of passive support; this is not a defining issue either way for them.

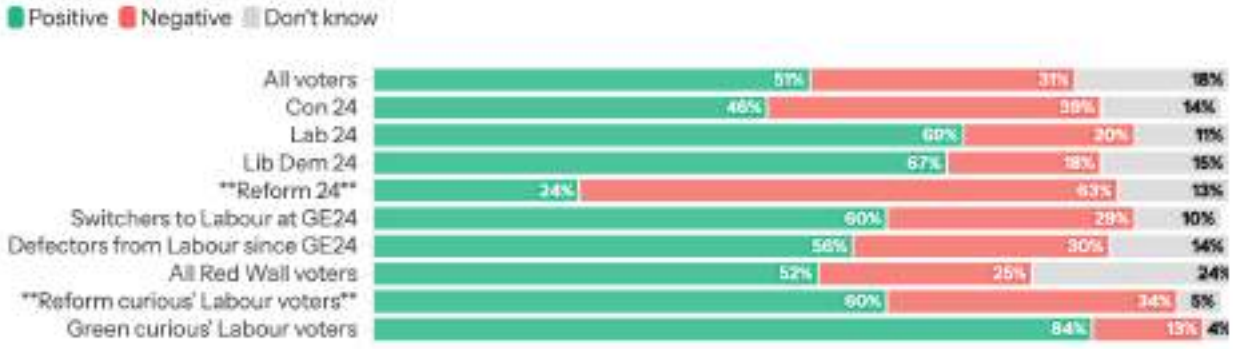
7 For quantification of the increase in coverage to this effect, see Carbon Brief, January 2025: "Analysis: UK newspaper editorials attacked Ed Miliband relentlessly throughout 2024"

They are less likely than the wider public and Labour vote to pick it as a top issue. As we saw in the values section, this makes them slightly less likely to be willing to accept cost or inconvenience as the price of the clean energy transition. This underscores the political importance of government avoiding noticeable cost and inconvenience to consumers in the switch to clean energy.

Top line view of Net Zero

For core Reform voters, Net Zero has become a dirty word. But this is not true of 'Reform curious Labour voters', who remain broadly sympathetic to it, even if it is a less salient issue than for other parts of the Labour vote. This brings them into line with the wider electorate.

"The Net Zero target is a target set by the government to reach zero greenhouse gas emissions by 2050 at the latest, balancing any carbon emissions that are produced with carbon-reducing measures, with the aim of reducing the risks from climate change. From what you've seen of it, do you have a positive or negative opinion of Net Zero?"



Opinium for LCEF, April 2025, 3,000 UK adults.

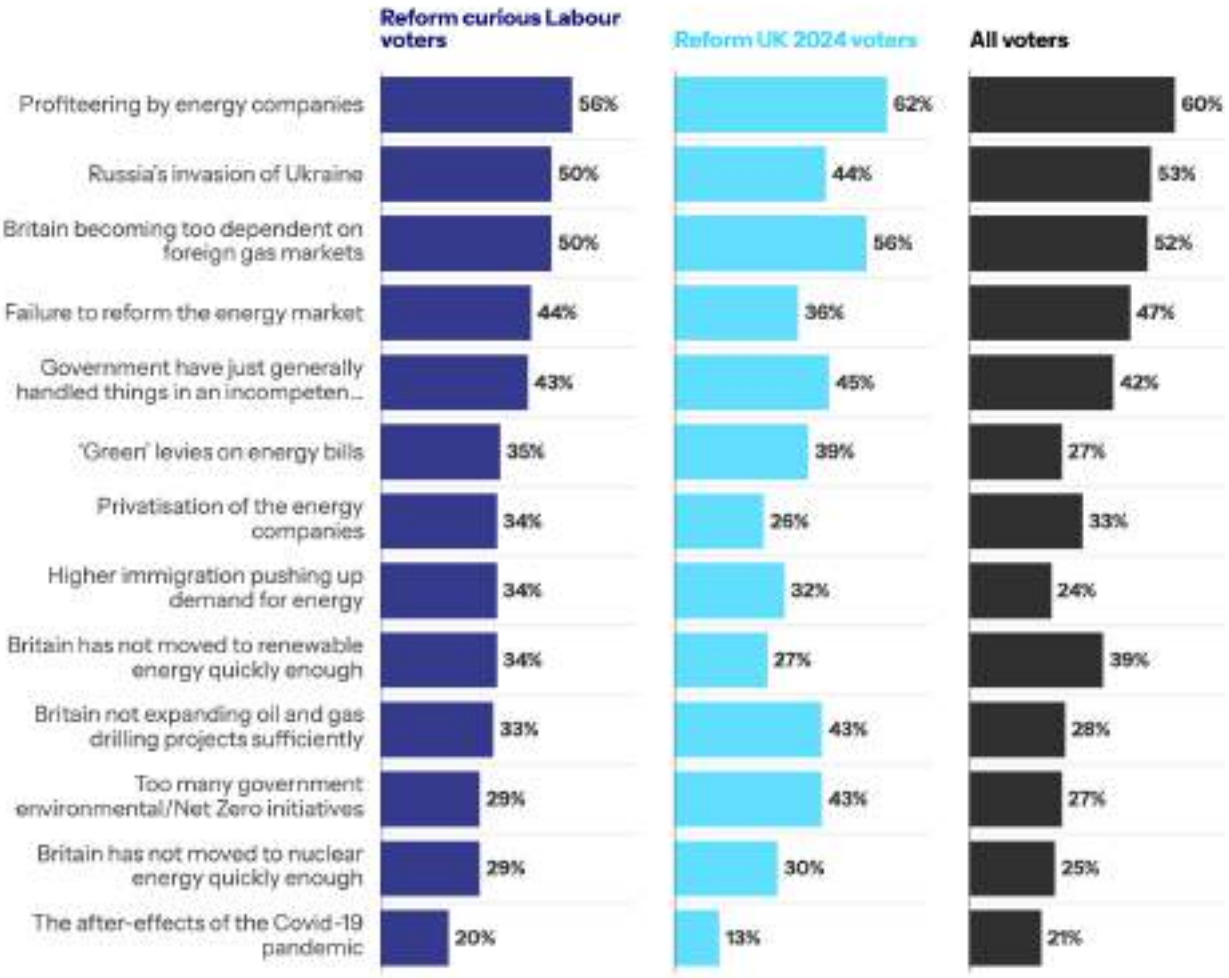
Persuasion UK

Issue focus: Net Zero

Explanations for high energy bills

Reform curious voters, like the wider electorate, blame profiteering and external factors on rising energy bills. They do not blame Net Zero or environmental initiatives in large numbers, unlike core Reform voters.

"Below is a list of things some people have suggested might explain rising energy bills in the UK. Which of these, if any, do you find most convincing as reasons for rising energy bills? Choose up to 5"



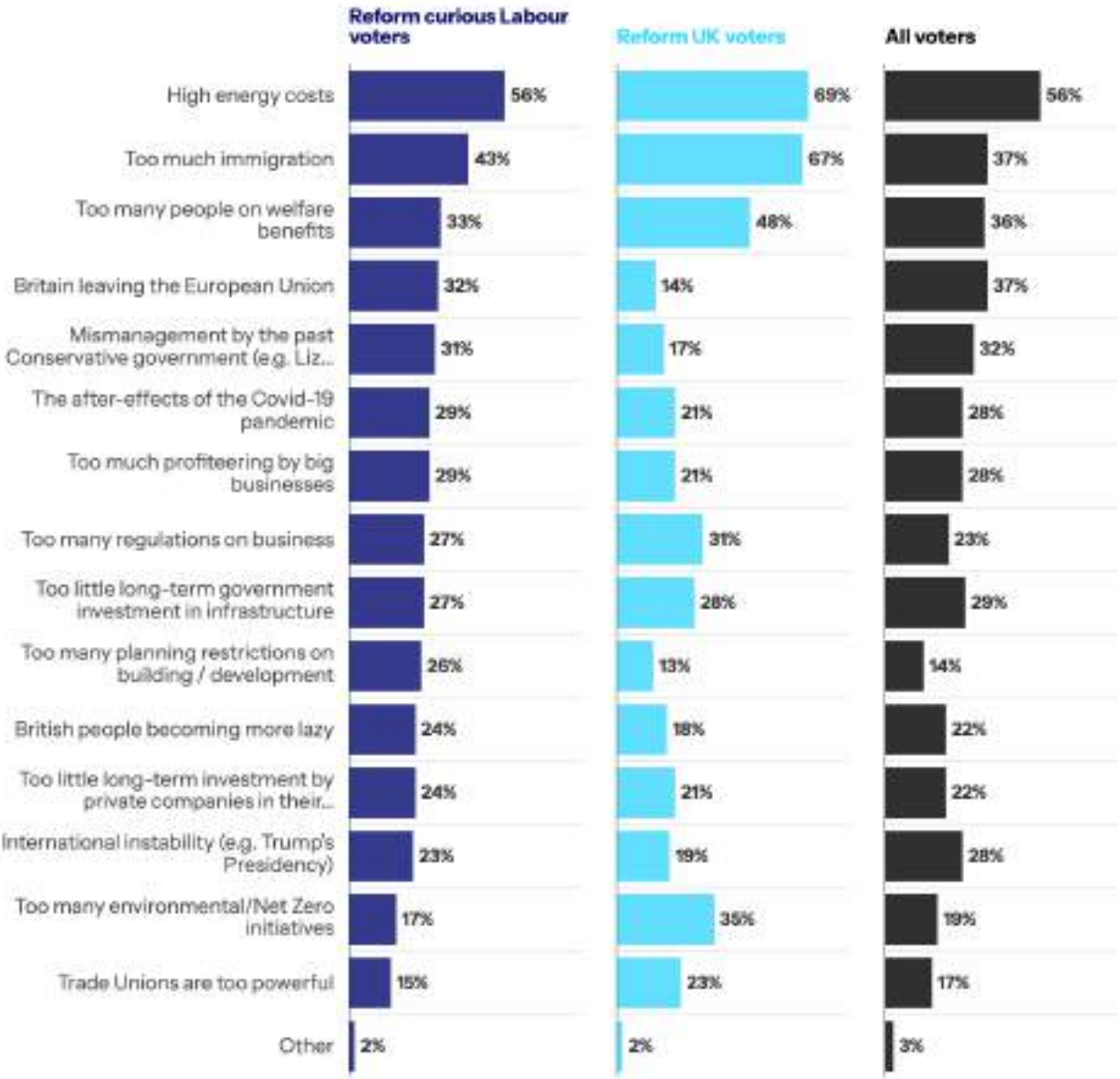
Opinium for LCEF, 3,000 UK voters, April 2025.

Persuasion UK

Issue focus: Net Zero

Explanations for low economic growth

"Below is a list of things some people have suggested might explain low economic growth in the UK. Which of these, if any, do you find most convincing as reasons for rising energy bills? Choose up to 5"



Opinium for LCEF, 3,000 UK voters, April 2025.

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Experiment 1: How might Labour hold its 2024 electoral coalition together?

Knowing the best way of persuading 'Reform curious Labour voters' is arguably a more complex task for Labour than it is Reform. This is because, as we saw in the values section of this report, Labour's coalition is divided on the cultural issues that are salient to these voters. The party has to balance a broader coalition and thus greater trade-offs exist.

These are some known unknowns here. For instance, would matching Reform on immigration halt losses to Reform but lead to losses to, for instance, the Greens? If so, are there any areas where these coalitional trade-offs are less sharp for the government?

To test these, we did the first of two experiments to try and surface salient vote moving dividing lines. The aim here is to look beyond whether different groups' policy views on different topics, and find out which issues - if any - truly drive vote switching.

Methodology

For this we used conjoint methodology. 1,000 Labour 2024 voters were recruited into an experiment in April 2025, via the pollster NorStat. They saw three policy platforms, one Labour, one Reform and one Green. These platforms were made up of six different policies, one from each of the following areas: asylum, immigration, Net Zero, welfare, wealth taxation and public services.

Crucially, for each respondent and rotation, Labour policy within these categories was randomised. For cultural policies, policies varied between very socially conservative and socially liberal. For economic issues, policies varied

between economically egalitarian and economically laissez faire. For the sake of sample efficiency, the Reform and Green platforms were fixed in positions we know they have, or can be defensibly represented as having. This saw Reform take up highly socially conservative policies, mixed with moderate and laissez faire economic policies, and the Greens take up left-liberal positions on all the key issues.

Respondents were then asked to imagine that the parties stood on these platforms at the next election, and which party they would vote for in that instance.

In the analysis phrase, we can see which theoretical Labour policies drove the most number of Reform curious voters to Reform, and Green curious voters to the Greens - and trade-offs therein. We can also see which policies, if any, increase the probability of these voters sticking with Labour. The idea here is to better get at the 'balancing dilemmas' Labour has with retaining both sides of its winning electoral coalition.

As the left option, we chose the Greens rather than the Lib Dems because 'Green curious' Labour voters are similar in number to their Lib Dem equivalents (indeed about half of them are literally the same voters) but represent the outer edge of the Labour vote in values terms, so the trade-offs are more likely to be notable. Generally speaking, the Greens are also more likely to be attacking Labour in the coming years than the Lib Dems, so we felt this had more ecological validity.

Indeed, representing all five major parties in the experiment would theoretically have been possible but would have required both a large amount of sample - to maintain statistical power - and reading time for respondents that, on balance, we decided against it.

Likewise, we only recruited Labour voters - not a wider pool of possible Labour voters - because we wanted to look at tensions within the 2024 coalition and make sure we had enough sample to do this robustly. Adding vote to this might theoretical be possible for Labour, but it's also a stretch based on current polling, so we kept it simple.

We accept both of these choices bring slightly limitations to the final results - which are noted elsewhere in this section also - but believe they do not detract from the overall findings.

The platform possibilities are listed below, followed by an example screenshot - and platform variation - seen by one respondent.

As a quantity of interest in the analysis, we have computed centered marginal means. This means that we subtracted from each marginal mean the average of the marginal means in each column. This gives a more easily understandable way of ordering possible Labour policies from most vote maximising to least vote maximising, while also allowing us to compare scores across categories.

Issue	Labour platform (vary)	Reform platform (fix)	Green platform (fix)
Immigration	Put a complete stop to all immigration Significantly reduce all immigration, introducing a hard cap of 150,000 people a year Keep overall migration at current levels, but reduce low-skill migration Increase overall immigration from current levels	Put a complete stop to all immigration	Increase overall immigration from current levels

Issue	Labour platform (vary)	Reform platform (fix)	Green platform (fix)
Asylum seekers	Deport all asylum seekers and refugees with no exceptions,repealing human rights legislation to make it happen More quickly process and deport asylum seekers without a legitimate claim, but allow legitimate cases to stay Liberalise asylum policy so Britain accepts more refugees	Deport all asylum seekers and refugees with no exceptions, repealing human rights legislation to make it happen	Liberalise asylum policy so Britain accepts more refugees
Net Zero	Abolish all UK efforts to limit climate change Go slower in the UK's efforts to limit climate change, moving to renewable energy more slowly Go faster in the UK's efforts to limit climate change, moving to renewable energy faster	Abolish all UK efforts to limit climate change	Go faster in the UK's efforts to limit climate change, moving to renewable energy faster

Issue	Labour platform (vary)	Reform platform (fix)	Green platform (fix)
Wealth taxes	Introduce a wealth tax on the assets of the wealthiest 1% of the population Keep taxes on the wealthiest the same as now Cut taxes on the wealthiest 1% of the population	Cut taxes on the wealthiest 1% of the population	Introduce a wealth tax on the assets of the wealthiest 1% of the population
Welfare	Increase the amount of money that people on benefits receive Maintain the current amount of money that people on benefits receive Reduce the amount of money that people on benefits receive	Maintain the current amount of money that people on benefits receive	Increase the amount of money that people on benefits receive
Public services	Significantly increase funding for the NHS and other front-line services Maintain the current levels of funding for the NHS and other front-line services Decrease funding for the NHS and other front-line services	Maintain the current levels of funding for the NHS and other front-line services	Significantly increase funding for the NHS and other front-line services

Example dilemma/choice faced by experiment participant

Putting aside your usual party preferences, which party platform do you prefer the most?

Version: 99

Party	Labour	Reform	Green
Immigration	Put a complete stop to all immigration	Put a complete stop to all immigration	Increase overall immigration from current levels
Wealth taxes	Cut taxes on the wealthiest 1% of the population	Cut taxes on the wealthiest 1% of the population	Introduce a wealth tax on the assets of the wealthiest 1% of the population
Asylum seekers	Deport all asylum seekers and refugees with no exceptions, repealing human rights legislation to make it happen	Deport all asylum seekers and refugees with no exceptions, repealing human rights legislation to make it happen	Liberalise asylum policy so Britain accepts more refugees
Public services	Decrease funding for the NHS and other front-line services	Maintain the current levels of funding for the NHS and other front-line services	Significantly increase funding for the NHS and other front-line services
Net Zero	Abolish all UK efforts to limit climate change	Abolish all UK efforts to limit climate change	Go faster in the UK's efforts to limit climate change, moving to renewable energy faster
Welfare	Reduce the amount of money that people on benefits receive	Maintain the current amount of money that people on benefits receive	Increase the amount of money that people on benefits receive
Select the best platform	○	○	○

Results

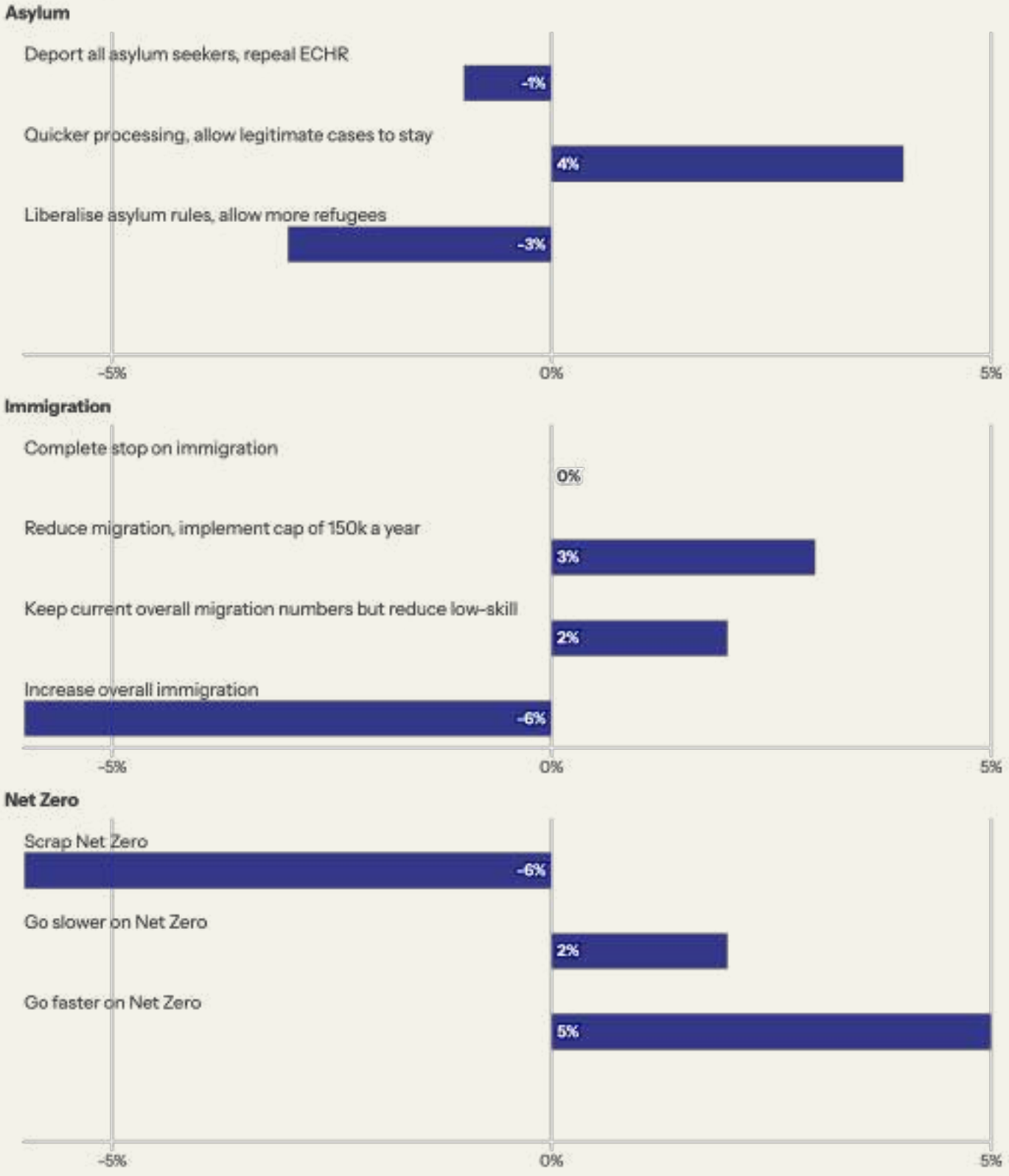
In the end, the experiment replicates quite nicely some of what we have seen elsewhere in this report.

That is, immigration and asylum divide the Labour vote, but populist economics - combined with ambition on Net Zero - appear to unite it.

We can look first at what we might call 'cultural axis' issues: asylum, immigration and Net Zero.[8]

8 We have categorised Net Zero as a cultural issue here simply because it is commonly thought to be a 'culture war' issue, though in reality it tends to operate somewhere in-between culture and economics for most voters. The pollster James Kanagasooriam called these types of issues 'culture-nomics' issues.

NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - cultural axis



"Imagine that, in the next general election, the Labour party, Reform UK and the Green party stood on the below policy platforms. Bearing in mind your views on the issues...which program would you choose if you had to?". *Sample: 1,000 GE2024 Labour voters.*

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On the first two of these, we find that middle ground positions are safest - with the most socially liberal and conservative policies in the experiment costing Labour more of its vote than it gained, or else cancelling themselves out in gains and losses.

To take asylum firstly, the most liberal position - liberalise criteria to allow more refugees - saw Labour lose votes to Reform. But 'deport all asylum seekers, repeal human rights legislation to do so' also narrowly ended up a net negative for Labour. What it gained in retaining Reform curious Labour voters, it lost to the Greens in their Green curious counterparts.

Turning to immigration, we find something similar. 'Increase overall immigration' sees large Labour defections to Reform's anti-immigration platform, but matching Reform's policies on immigration ('complete stop') does not help Labour, as it again loses to the Greens what it gains from Reform.

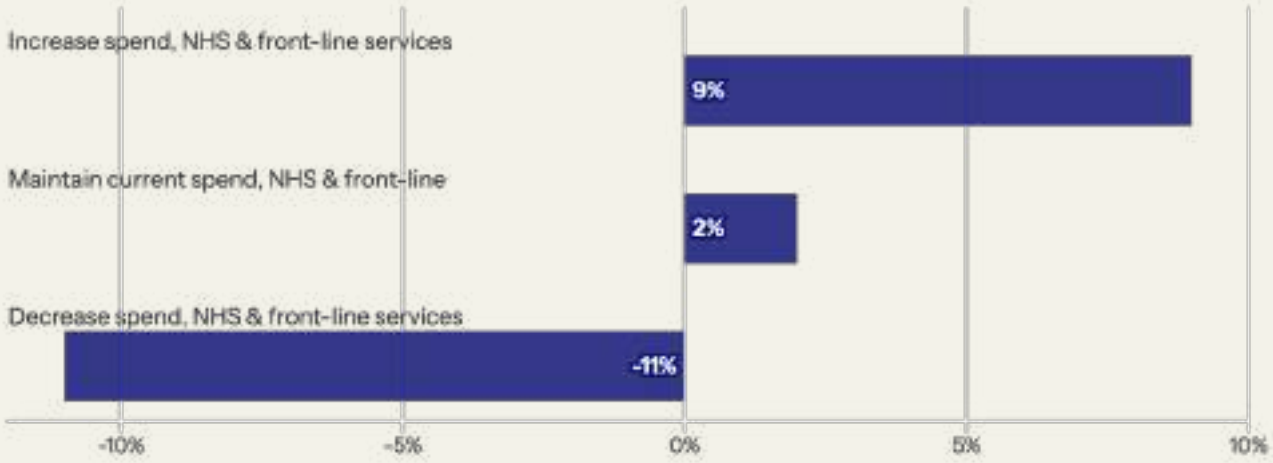
A slightly more moderate anti-immigration stance - a 150k cap on net migration - is advantageous to Labour, but so is a more or less status quo position (keep overall numbers the same, reduce low skill migration). The pull of both of these is fairly limited. Overall, this is an issue Labour needs to be 'safe' on, but it is quite hard for them to parlay it into a big vote winner.

On Net Zero, though, interestingly we see that none of these coalitional or cultural trade-offs really exist for Labour. As we touched on earlier, the environment and fight against climate change is salient to the left part of Labour's coalition, but is not unpopular (even if far less important) with the right leaning part, because Reform curious Labour voters have distinct views on this area to the Reform base. This makes clear anti-Net Zero signalling one of the most unpopular Labour policies in this experiment, leading to large-scale Labour defection to the Greens but gaining Labour nothing in retention from Reform. Conversely, going further and faster on Net Zero proves a free hit in this experiment - one of the most successful tested here - because it retains possible Green switchers without losing any Labour voters to Reform. This is played out in proxy in the graduate vs non-graduate vote movement on this topic.

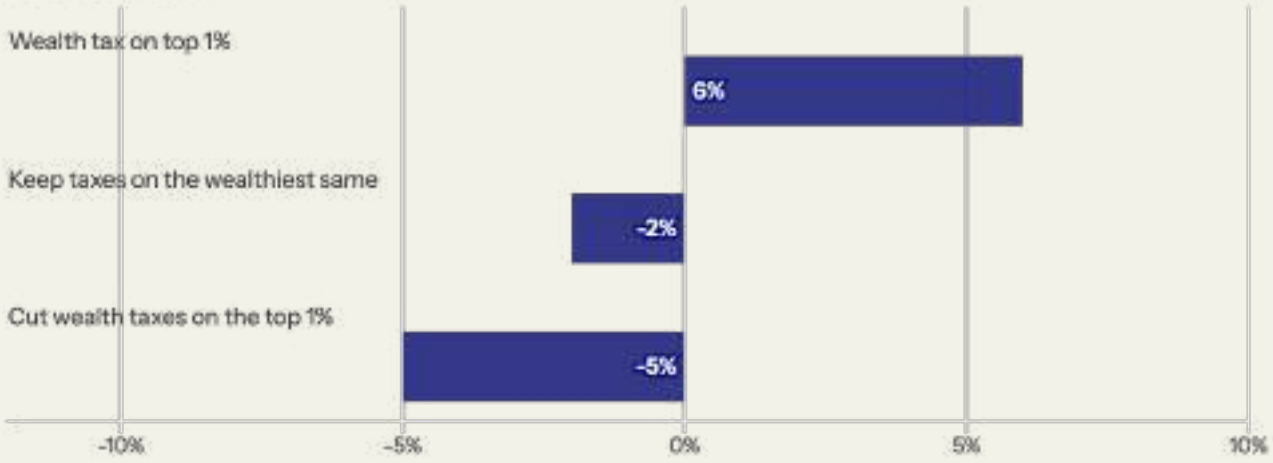
The one caveat here is 'go slower' on Net Zero appears to be tolerated as a position by Labour voters overall. Arguably, then, provided Labour voters did not interpret soft-pedalling as an explicit rejection of Net Zero, the electoral risks would be lessened; though it remains a much less electorally optimal position for them within their coalition.

NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - economic axis

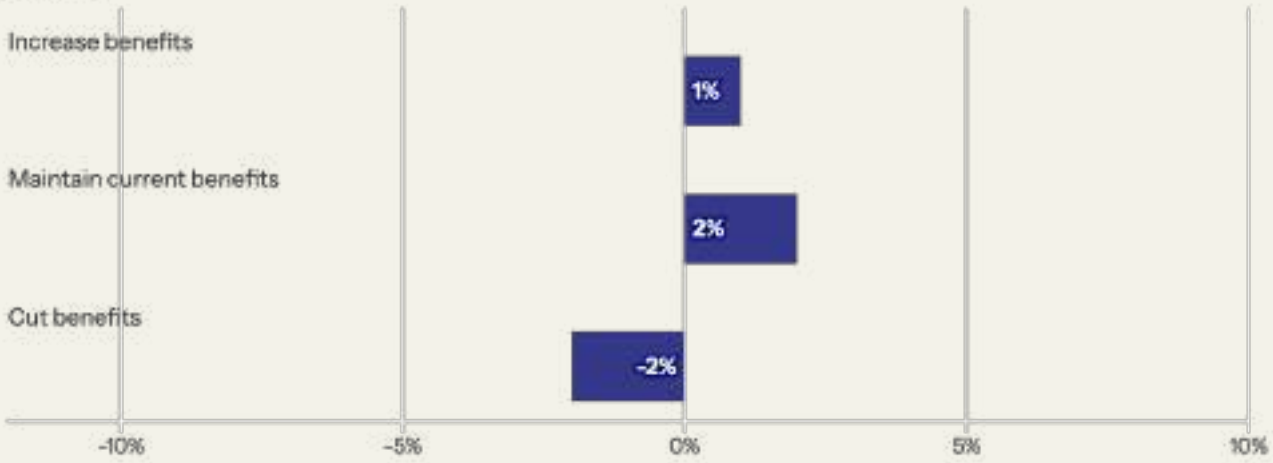
Public services



Wealth taxation



Welfare



"Imagine that, in the next general election, the Labour party, Reform UK and the Green party stood on the below policy platforms. Bearing in mind your views on the issues...which program would you choose if you had to?". *Sample: 1,000 GE2024 Labour voters.*

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It is on the economic axis, though, where the two most positive sum policies are found for Labour. Previous work by Persuasion has shown that fixing public services was pivotal to Labour's mandate out of the last election.[9] And here a pledge to further increase funding for front-line services is the most vote maximising policy in the experiment, increasing the likelihood that both sides of the party's coalition opt for the party again over competitors to their right and left.

In addition, we can see that a wealth tax on the wealthiest 1% is the second most vote moving policy in the experiment. This speaks to the economic populism that unites both Green curious and Reform curious parts of the Labour vote.

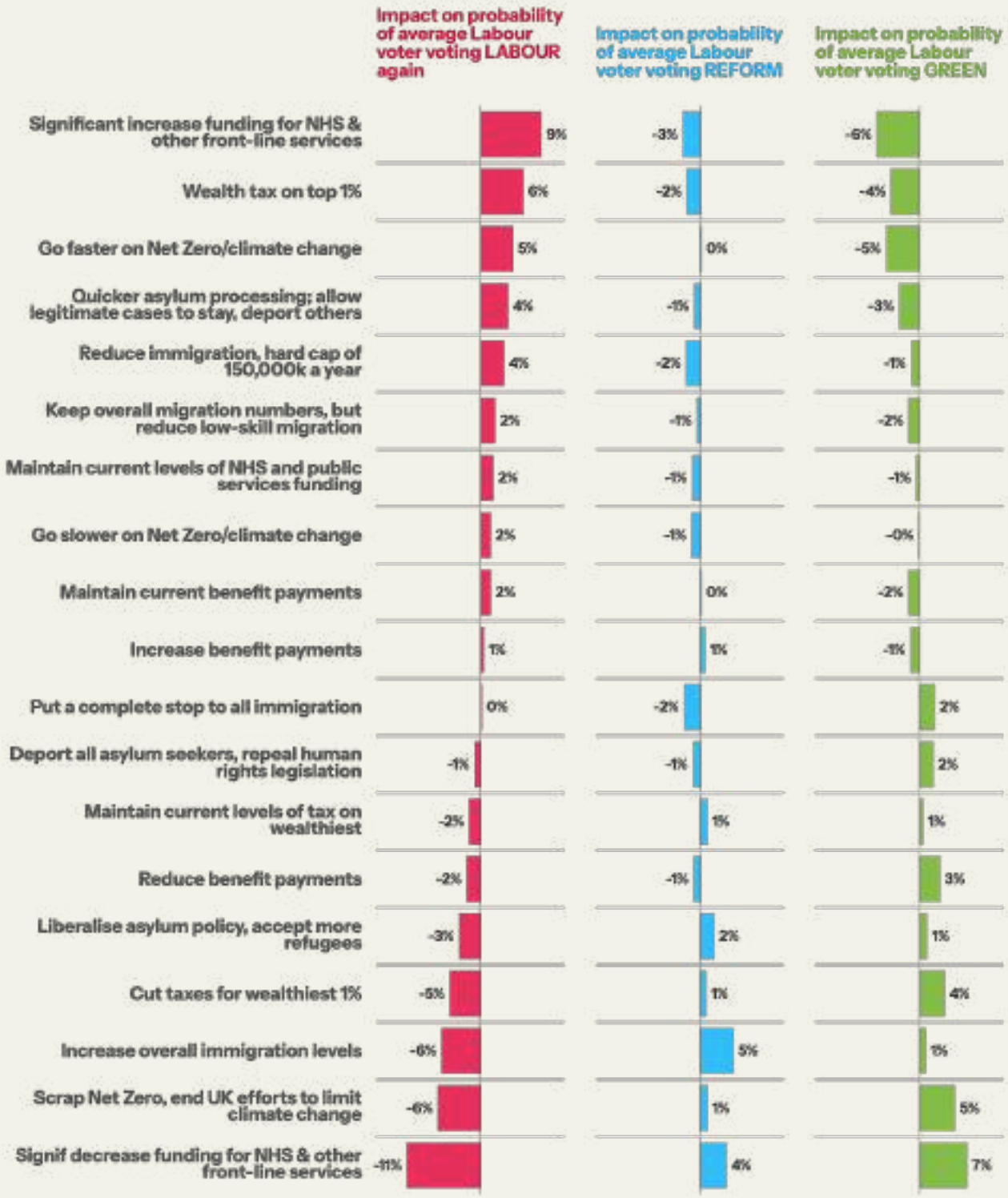
On welfare, a recent controversy, this does not seem a massively vote moving issue either way, with a slight penalty for an anti-benefits position but no massive gains for increasing benefits either.

9 See our project with IPPR around the Autumn budget.

NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - all polices ranked, showing leakage to or retention from Reform & Greens

The optimum platform in holding together the Labour coalition is moderation on asylum and immigration combined with populism on economics. Ambition on climate change a 'free hit' as it prevents Labour leakage to the Greens without causing any to Reform.

How to read this graph: the more a policy is net negative, the more it loses Labour voters to a party's platform. The more it's net positive, the more it wins Labour voters to its platform. Three-party conjoint experiment, net impact of policy on probability of Labour voter opting for Labour platform, Reform platform or Green (quantity of interest: marginal means vs category average)



NorStat for Persuasion UK, April 2025.
Policy descriptors truncated to fit on graph legibly.

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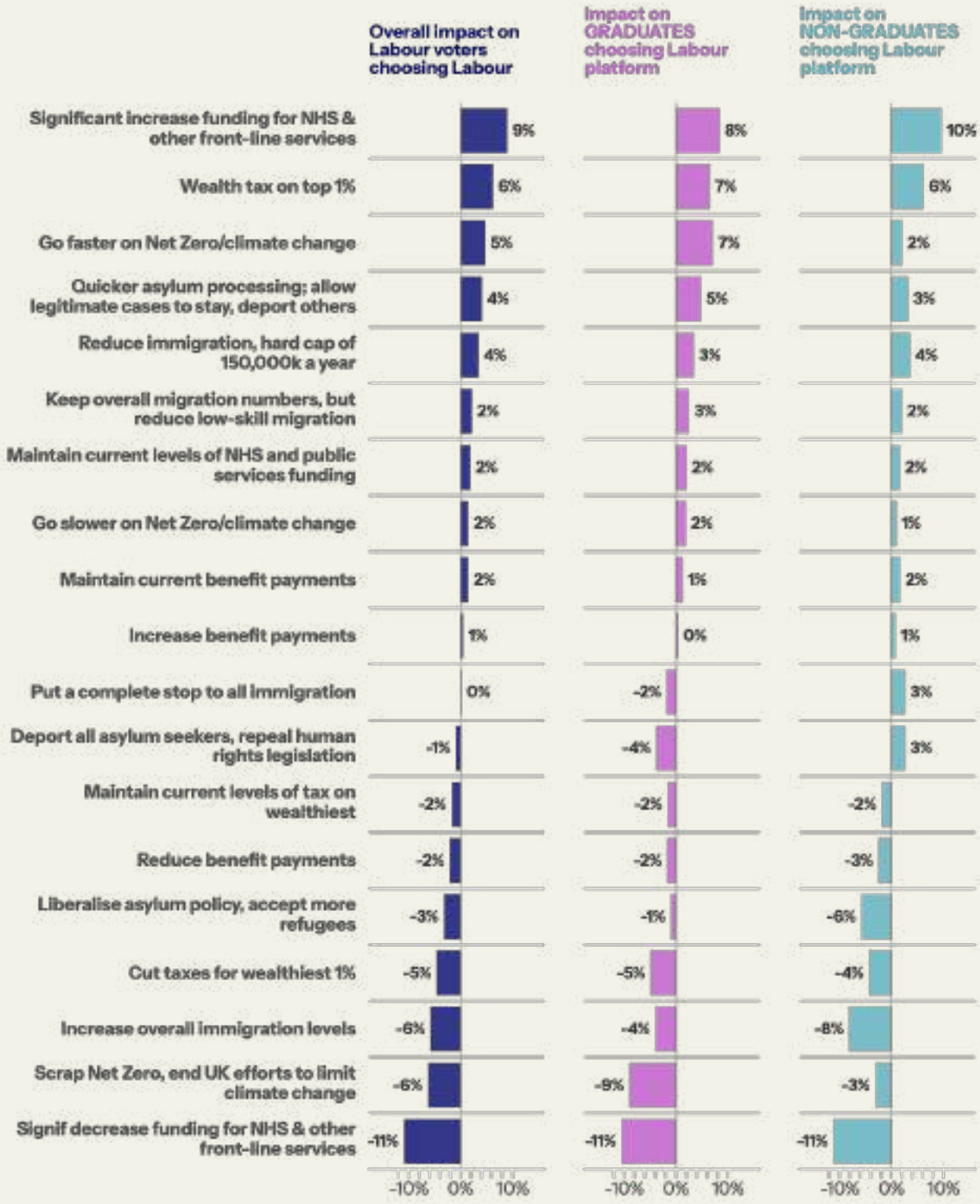
NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - all polices ranked, showing leakage to or retention from Reform & Greens

Very harsh positions on asylum and immigration are neutral (or narrowly net harmful) to Labour because what they gain in non-graduate loyalty, they lose in graduate defection. Meanwhile, more progressive stances on left-right 'position issues' unite both sides. Net Zero is of lower salience to non-graduate Labour voters, but they are not hostile to it, allowing Labour to get the upside with graduates with no downside on the other side of its coalition.

Three-party conjoint experiment, impact of policy on probability of Labour voter opting for different platforms (quantity of interest: marginal means vs category average)



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How to interpret these results - and how not to

Demonstrably, elections are about more than just issue divides - or position issues as social scientists call them. For starters, 'valence issues' such as competence, delivery and trust all matter too, to say nothing of tactical voting considerations we have seen earlier in the report.

Moreover, this particular experiment can only capture the gravitational push and pull of position issues within the Labour vote. It cannot tell us what the trade-offs are within voters who might want to switch to it from other parties, or what different signalling does to the anti-Labour vote on the right.

It should go without saying that no experiment can perfectly capture all of the moving parts which influence voter choice.

All that said, we can say with confidence that position issues still matter a great deal - especially as brand loyalties to political parties frey and voters become more transactional in their voting.

They matter in part because they help voters understand who parties are fighting for and against.

For that reason - rather than obsessing too much on the technical specifics of different policy ideas - this experiment should be read as an insight into the different *signals and dividing lines* that are useful for Labour in balancing its election winning coalition.

The path that emerges is to maintain relative moderation on divisive cultural topics, *but then actively seek populist dividing lines with Reform on the economic axis*. Confident signalling on Net Zero also presents itself as a free hit, helping them halt defections to the Greens or Liberal Democrats.

In reality, all of this would need to be about more than adopting certain policies or even giving speeches. In this experiment, we forcibly show voters the different possible divides between parties. In the real world, though, given the modern media environment, voters are unlikely to notice these divides unless parties actively seek conflict on them.

This would therefore involve the government more actively welcoming fights and opposition on economic justice and clean energy divides, as a chance

to convey the differences between competing parties – seeking to shift the issues of conflict within politics away from cultural divides and on to more favourable territory.

Given everything going on in the world, this is not an easy thing for any party to achieve, even one in government. But combining this kind of 'emotionalism' with at least a modicum of 'deliverism' – tangible progress on public services especially – is probably the only way through at the next election. If Labour can orientate its political strategy around these objectives, there remains a clear path to uniting its coalition.

Experiment 2: How can Reform best win voters from Labour? Is there anything Labour can do to win Reform voters?

Having looked at how Labour can balance its coalition, we can turn to look at how Reform might maximise its share of the Labour vote.

For this, we use a similar methodology to the prior experiment - a conjoint experimentation - except we limit the choices to Labour and Reform. In this experiment, we also vary both platforms, both of which have seven issue categories within them. To keep thing realistic, there were a few issues we did not assign to Reform (e.g. liberalising on migration and asylum) and Labour (e.g. reducing the minimum wage).

The issue categories and levels within them, plus an example of what one respondent saw, is below.

Once again, the quantity of interest is centred marginal means.

However, this time, we add 500 Reform voters to the experiment as well as 1,000 Labour 2024 voters.

Issue category	Positions available to Labour or Reform	Notes
Immigration	Put a complete stop to all immigration	
	Significantly reduce all immigration, introducing a hard cap of 150,000 people a year	
	Keep overall migration at current levels, but reduce low-skill migration	~ do not assign to Reform
	Increase overall immigration from current levels	~ do not assign to Reform
Asylum seekers	Deport all asylum seekers and refugees with no exceptions,repealing human rights legislation to make it happen	
	More quickly process and deport asylum seekers without a legitimate claim, but allow legitimate cases to stay	~ do not assign to Reform
	Liberalise asylum policy so Britain accepts more refugees	
Net Zero	Abolish all UK efforts to limit climate change	
	Go slower in the UK's efforts to limit climate change, moving to renewable energy more slowly	
	Go faster in the UK's efforts to limit climate change, moving to renewable energy faster	~ do not assign to Reform

Issue category	Positions available to Labour or Reform	Notes
Wealth taxes	Introduce a wealth tax on the assets of the wealthiest 1% of the population Keep taxes on the wealthiest the same as now Cut taxes on the wealthiest 1% of the population	
Workers rights	Raise the minimum wage, abolish zero hours contracts Keep minimum wage and zero hours contracts as they are now Reduce the minimum wage, make it easier for employers to use zero hours contracts	~ do not assign to Labour
Public services	Significantly increase funding for the NHS and other front-line services Maintain the current levels of funding for the NHS and other front-line services Significantly decrease funding for the NHS and other front-line services	
Russia	Increase support for Ukraine in their fight against Putin/ Russia Maintain current support for Ukraine in their fight against Putin/Russia Decrease support for Ukraine in their fight against Putin/Russia	~ do not assign to Labour

Putting aside your usual party preferences, which party platform do you prefer the most?

Version: 49

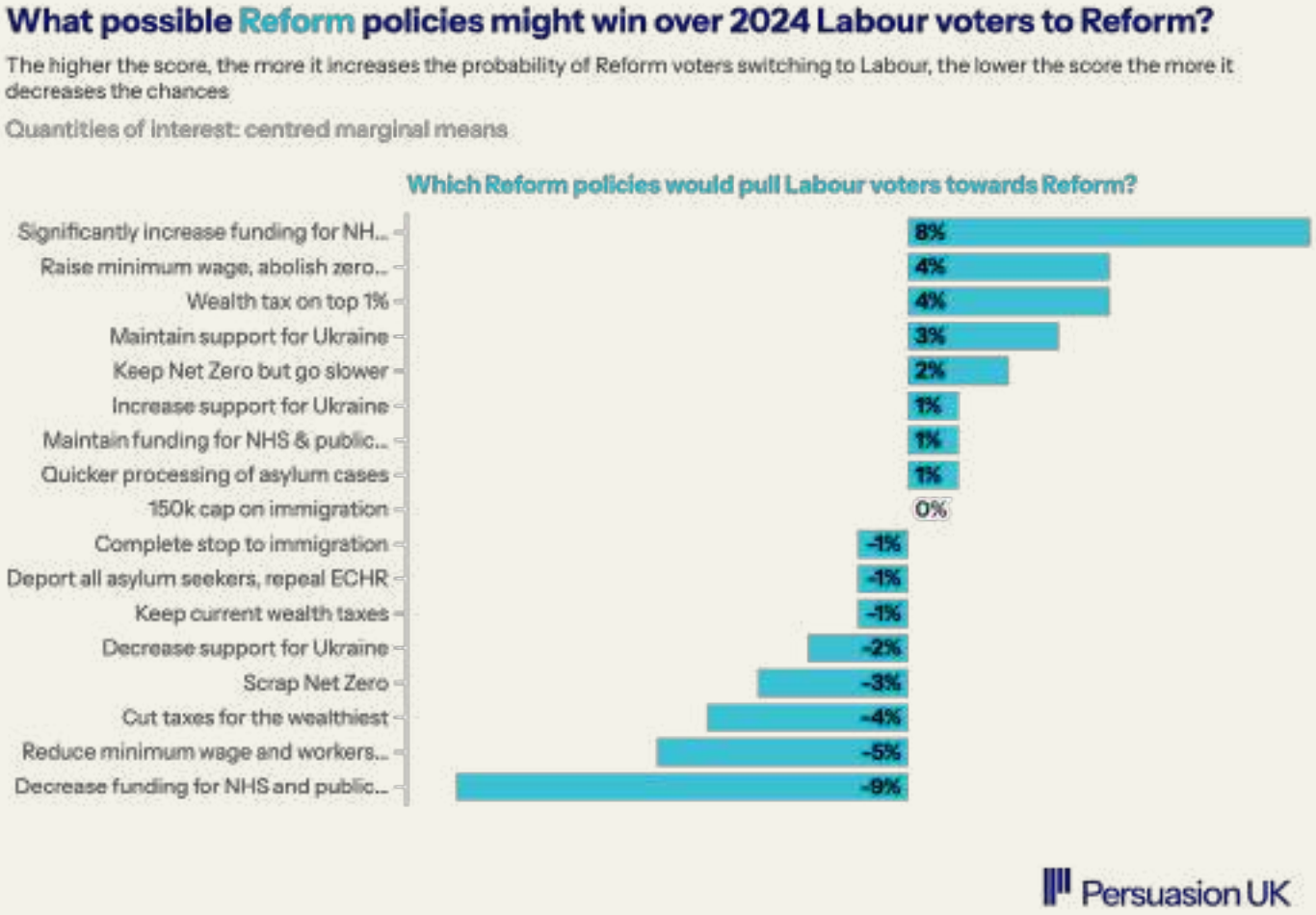
Party	Labour	Reform UK
Immigration	Put a complete stop to all immigration	Put a complete stop to all immigration
Wealth taxes	Keep taxes on the wealthiest the same as now	Introduce a wealth tax on the assets of the wealthiest 1% of the population
Asylum seekers	Deport all asylum seekers and refugees with no exceptions, repealing human rights legislation to make it happen	More quickly process and deport asylum seekers without a legitimate claim, but allow legitimate cases to stay
Public services	Significantly decrease funding for the NHS and other front-line services	Significantly increase funding for the NHS and other front-line services
Net Zero	Abolish all UK efforts to limit climate change	Go slower in the UK's efforts to limit climate change, moving to renewable energy more slowly
Workers rights	Keep minimum wage and zero hours contracts as they are now	Reduce the minimum wage, make it easier for employers to use zero hours contracts
Russia	Increase support for Ukraine in their fight against Putin/Russia	Maintain current support for Ukraine in their fight against Putin/Russia
Select the best platform	○	○

Results

Just isolating what Reform policies shift Labour voters back and forth, we can again see the salience of economic left-right positioning to the Labour vote at large.

Reform's anti-migration positions narrowly add an advantage, but Reform more significantly expands the number of Labour voters switching when it effectively runs to the left of Labour on economics.

For instance, increased funding for the NHS is again salient - it is easy to see why Vote Leave combined anti-EU stances with pro-NHS positioning - as is higher wealth taxation and raising the minimum wage.



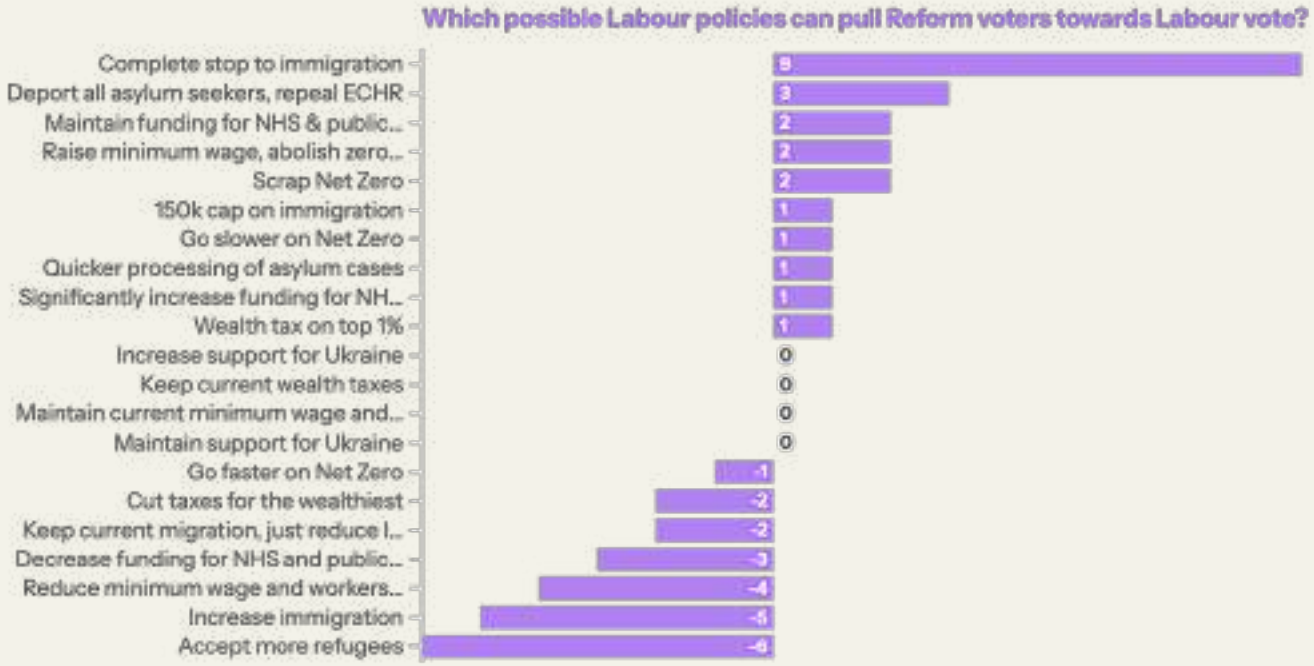
In terms of the 500 Reform voters we had in the experiment, around 50% of them did not prove susceptible to shifting their vote at all - suggesting they are hardened anti-Labour (or even anti-system) voters, not responsive to issue positioning.

Looking just at those who did shift, only the most extreme positions on immigration would tempt them over to Labour - something we saw in the prior experiment potentially causes Labour issues elsewhere in its coalition, such that the electoral upside and downside tends to net off against each other.

What possible Labour policies might win over 2024 Reform voters to Labour?

The higher the score, the more it increases the probability of Reform voters switching to Labour, the lower the score the more it decreases the chances

Quantities of interest: centred marginal means



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Conclusions and recommendations

In precis, our core findings can be summarised as the following:

- While the direct threat of Reform to the Labour vote is real, it should be put in perspective. Historically speaking Reform voters are not 'Labour's lost vote'.

- Reform curious Labour voters are a different kind of voter to the wider Reform vote. They are socially conservative but less intensely so, and more economically populist.

- They are, however, also a different kind of voter to the average Labour voter - and especially voters on the left flank of the Labour vote. This coalition finds itself split on cultural issues in particular..

- It is the salience of these cultural concerns - most overwhelmingly asylum and small boats - which accounts for a large amount of the pull from Labour to Reform, insofar as it exists.

Recommendations for Labour

- The best strategy for Labour in retaining these voters, without losing too much elsewhere, likely combines some we can think of 'deliverism' and 'emotionalism'.

- As an incumbent governing party, some real world progress on public services, small boats and cost of living will be essential.

- Beyond that, moderate signalling on racially-charged cultural issues combined with more explicitly populist positioning on economic axis issues - like public services or inequality - can unite an otherwise fractious vote. Likewise confident positioning on Net Zero. But the party would need to actively seek conflict on these issues in order to make the divides salient and known to voters

- If the government can avoid actively alienating its progressive flank, making the next election a clear choice between Labour and Reform will also help it leverage tactical voting dynamics among these voters.

Recommendations for Reform

- Reform's clear anti-asylum and anti-migration stances continue to be what holds its vote together, and it is no different with voters it wins from Labour.
- However, to maximise its potential share of the Labour vote, Reform will need to avoid drifting into positions that can be cast as extreme or overtly racist. It will also need to avoid obvious cosiness and proximity to figures like Donald Trump, Elon Musk and, more obviously, Vladimir Putin.
- If it can do the above, then its best bet is likely to combine robust anti-migration, anti-migration and anti-system positioning with running to the left of Labour on economics and public services, allowing Reform curious Labour voters to reconcile their cultural pull to Reform with their economic or social justice values.