

Persuasion UK

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graphs]*

Getting to know 'Reform curious Labour voters'
In-depth polling and experimentation - overview of slides

Published 28th April 2025



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

- x4 focus groups with Reform curious Labour voters in January 2025, via CRD Research. Two in England (Leeds and Birmingham) and two in Wales (South Wales; Bridgend and Neath). All held in Labour held constituencies where Reform is in second place.
- New polling commissioned by YouGov in March 2025.
 - A GB-wide survey of 4,000 adults, weighted to be nationally representative
 - A survey of 1,000 '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.
- 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.
- Analysis of existing data-sets, most notably the British Election Survey (BES) and, concerning attitudes to Net Zero specifically, Opinion collected for Labour Climate and Environment Forum (LCEF).

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





‘Labour to Reform switchers’ are real, but need to be put in perspective

- Historically speaking, Reform votes are not ‘Labour’s lost voters’
- Looking forward, the direct Reform threat is genuine - albeit needs to be seen in the context of potential losses elsewhere to Lib Dems and Greens.
- Labour likely has to balance all of these different voter groups in order to win next time.

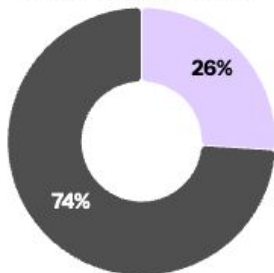




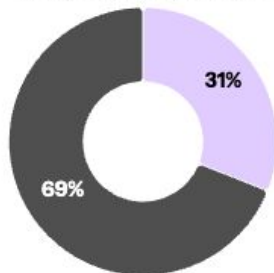
Reform 2024 voters and their historical relationship with Labour

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

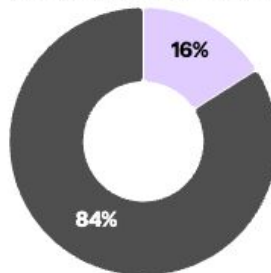
All Reform 2024 voters



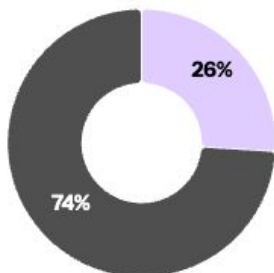
Reform voters in Red Wall



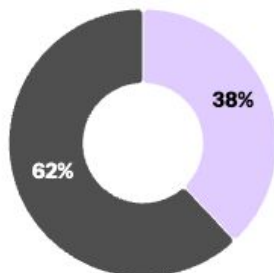
Reform voters in Blue Wall



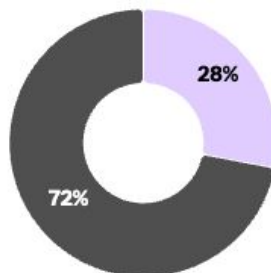
Reform voters in all seats won by Labour from Conservative in GE2024



Reform voters in Lab held seats where Reform are 2nd



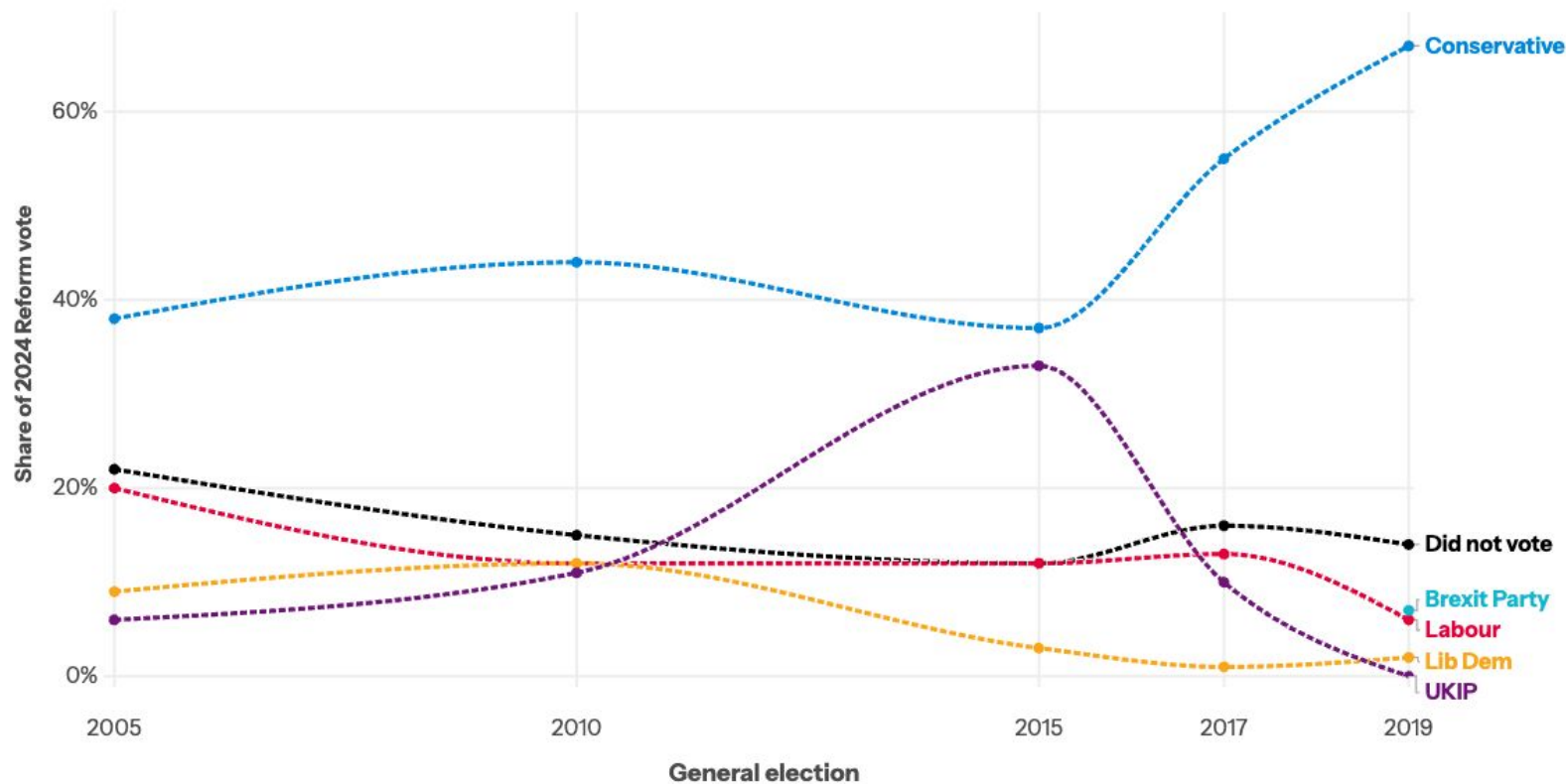
Reform voters in Wales



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



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.

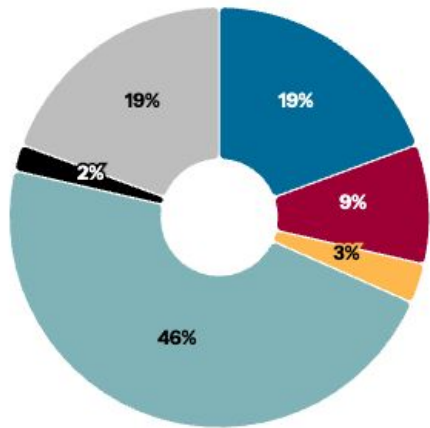
Composition of current Reform vote, by seat type

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

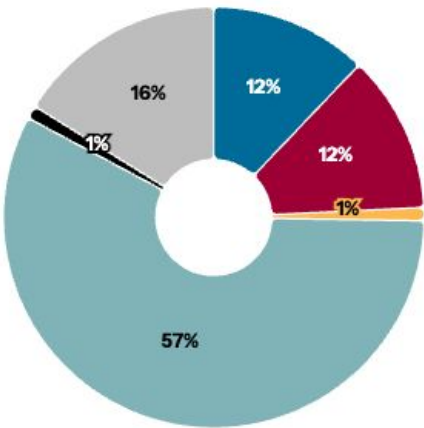
As of April 2025

Conservative 2024 Labour 2024 Lib Dem 2024 Reform 2024 Other 2024 Did not vote 2024

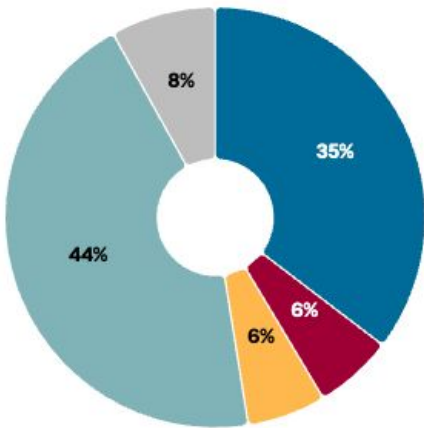
All seats



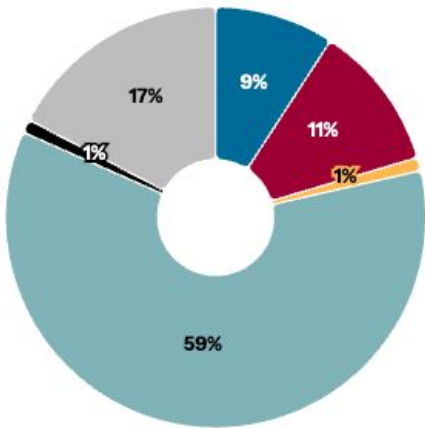
Red Wall



Blue Wall



Labour held seats where Reform are second

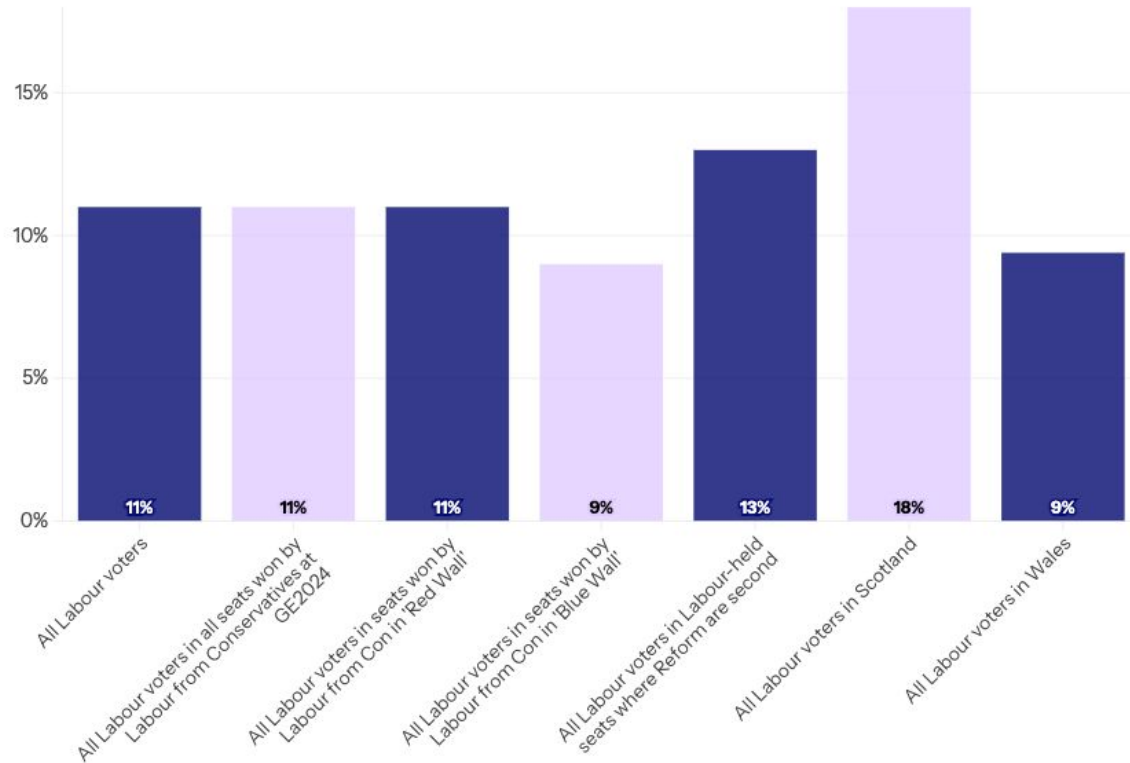


YouGov for Persuasion UK, April 2025. Smaller parties (<1%) excluded for ease of visualisation.



% of 2024 Labour voters who are 'Reform curious'

Reform curious = putting themselves at >5/10 willing to vote Reform

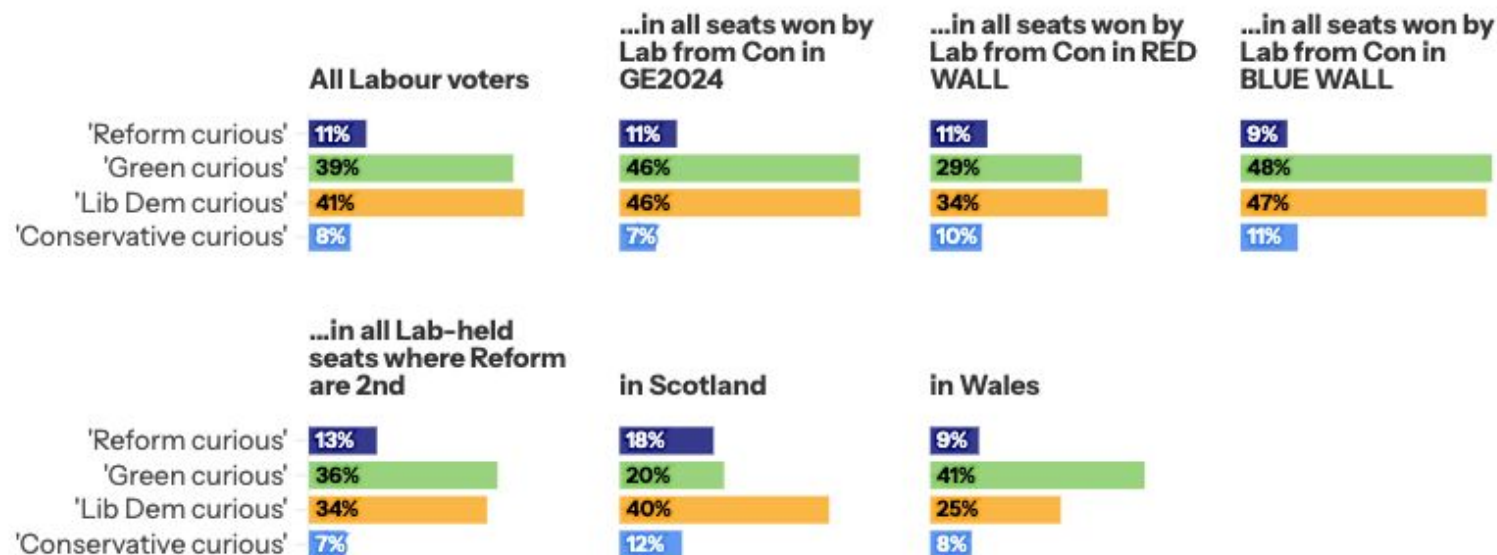


"On a scale of 0-10, how willing are you to vote for each of these parties at the next general election? Reform UK"

% 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

*** Update 22/05/25: the 'Green curious' Labour figure here has been updated and is slightly higher than in the initial version of this report (eg 39% of the Labour vote nationally is Green curious, not 29%). This was due to a small scripting error and a miscommunication between YouGov and Persuasion. This update does not affect any other analysis in the report. ***



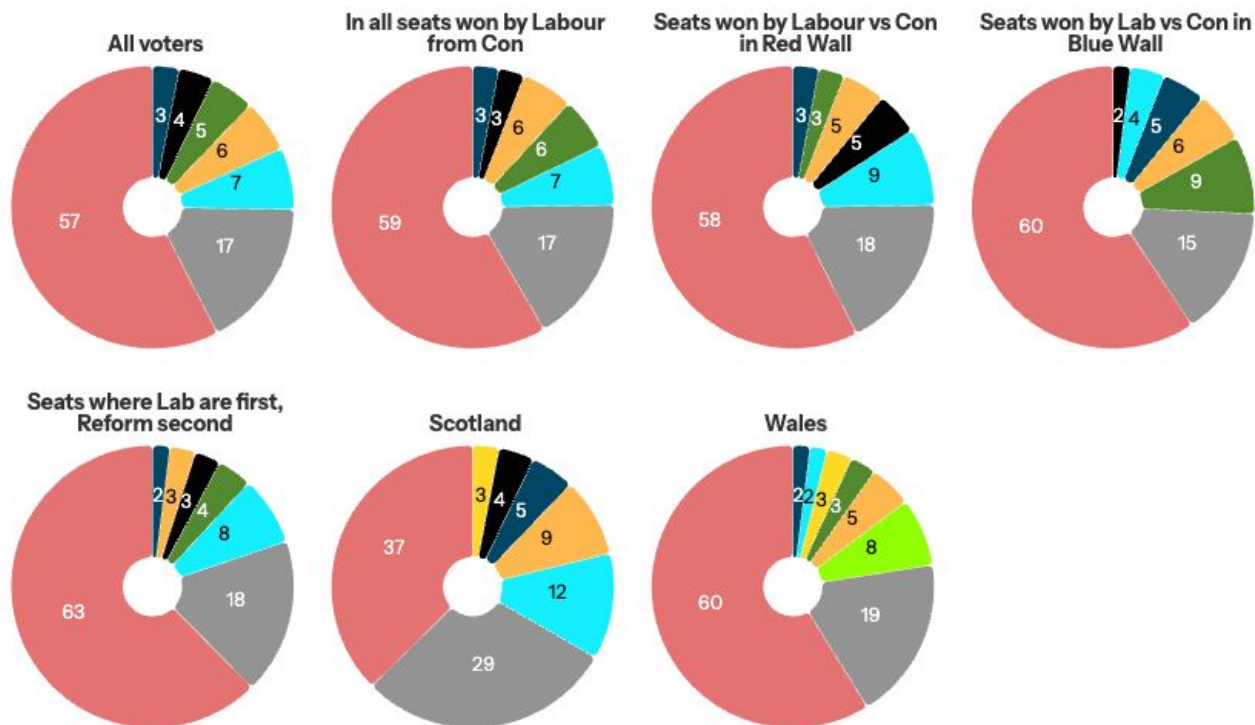
"On a scale of 0-10, how willing are you to vote for each of these parties at the next general election?". Voter counted 'party curious' if putting themselves above 5/10. YouGov for Persuasion UK, April 2025. Excludes don't knows.



Where have Labour 2024 voters gone? By battleground

% voting intention for Labour 2024 voters, as of early April 2025

■ Conservative ■ still Labour ■ Liberal Democrat ■ SNP ■ Plaid ■ Reform UK ■ Green ■ Would not vote ■ Don't know



"If there were a general election held tomorrow, which party would you vote for?" YouGov for Persuasion UK, April 2025



YouGov MRP analysis, all else being equal:

- If Labour lost every 'Reform curious Labour voter', they would lose 123 seats
- If Labour lost every 'Green curious Labour voter', they would lose 250 seats

The skill here for Lab is in uniting the two, not saying one matters at the expense of the other.



Tactical voting dynamics

Currently, it appears to be net useful for Labour to have the next election framed as Labour vs Reform.

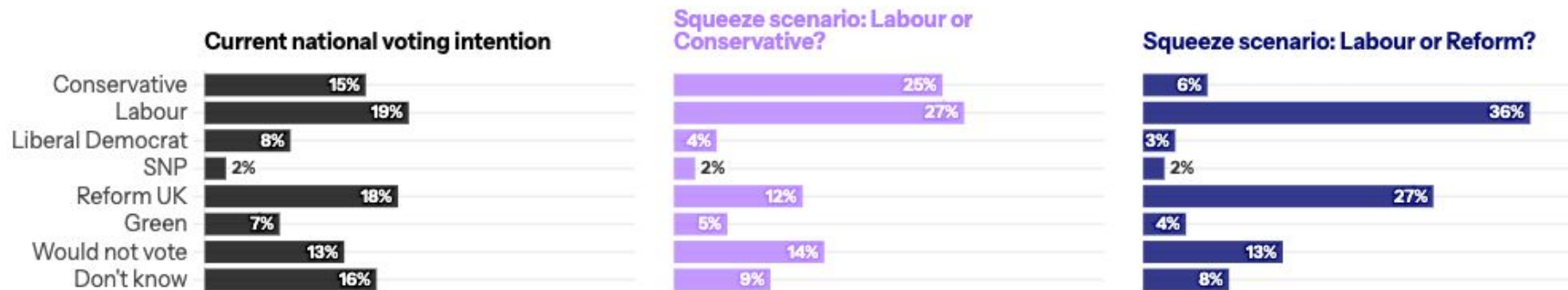
Labour's tactical voting advantage over the Conservatives, by contrast, appears to have disappeared as the anti-Labour vote becomes more efficient.





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.

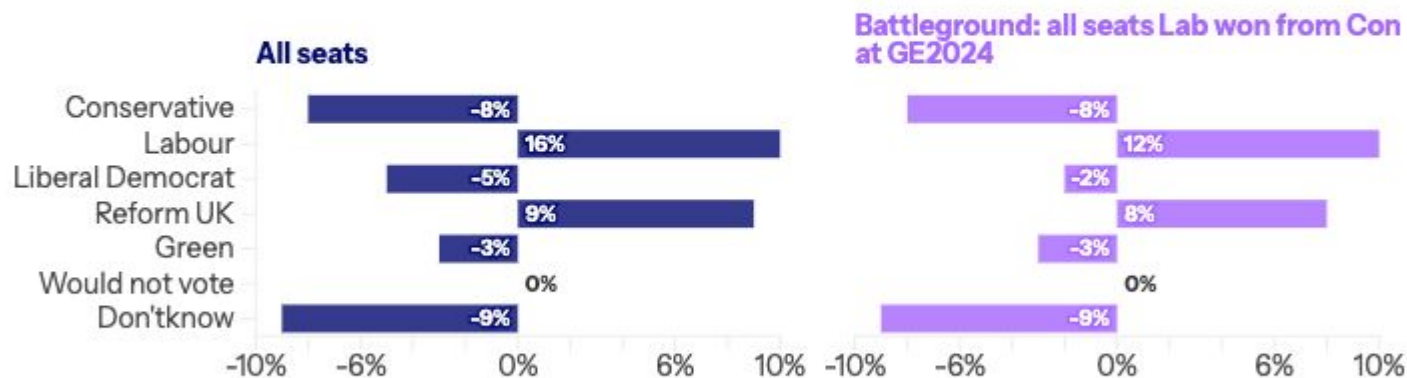


"If there were a general election held tomorrow, which party would you vote for?". Thereafter, sample split into one of the following: "Now imagine that at the next UK general election the only parties that could realistically win in your constituency were [A - the Conservatives]/[B - Reform UK] or Labour, 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.



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.

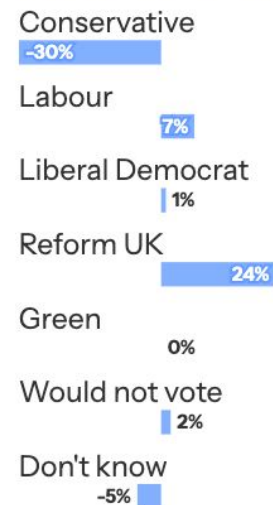




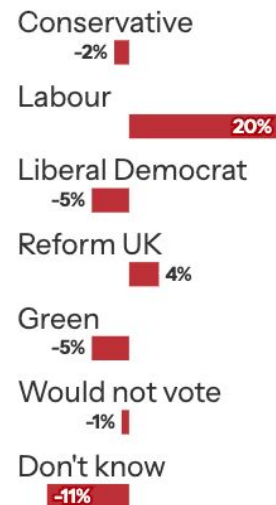
Change in how 2024 voter groups vote if the choice is Labour or Reform in their area, compared to *current voting intention*

Labour squeeze their own 2024 vote more effectively in this scenario compared to their currently intended vote, as well as gaining Greens, Lib Dems, non-voters and even some Conservatives. This helps offset a slight increase in the share of Labour voters going to Reform.

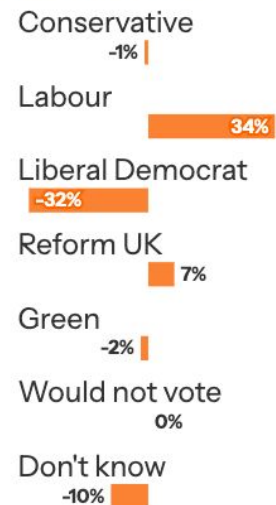
Change in how Conservative 2024 vote



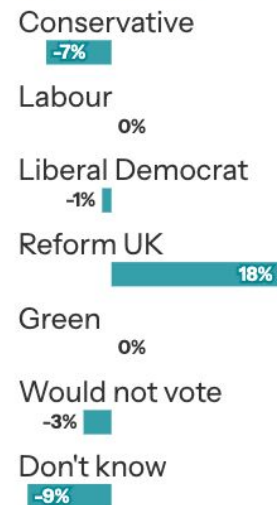
Change in how Labour 2024 voters vote



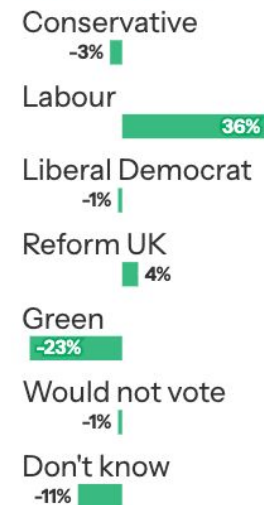
Change in how Lib Dem 2024 voters vote



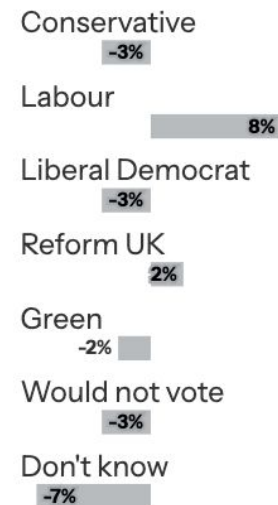
Change in how Reform 2024 voters vote



Change in how Green 2024 voters vote



Change in how 2024 non-voters vote





Understanding the demographics of 'Reform curious Labour voters'

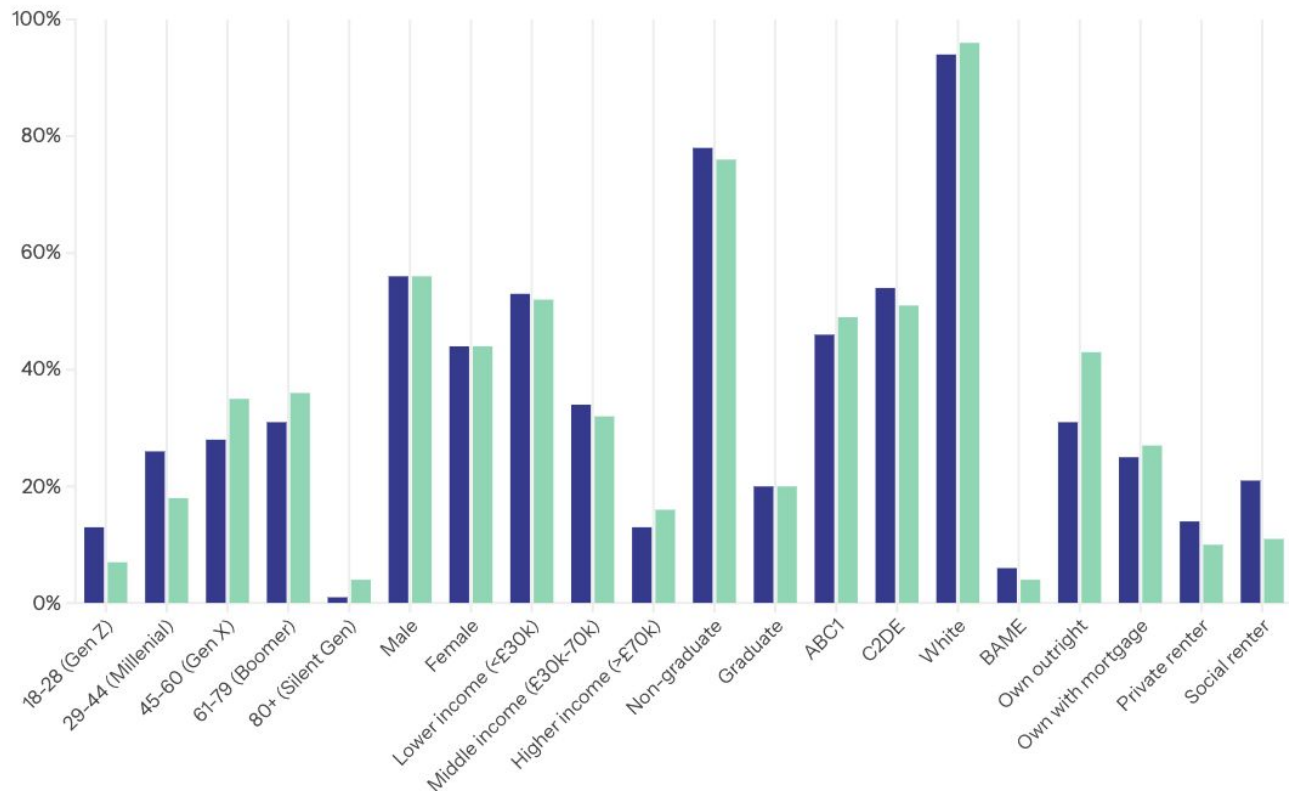
These voters are demographically quite similar to the wider Reform vote - but have different media diets.





Demographic profile of Reform curious Labour voters

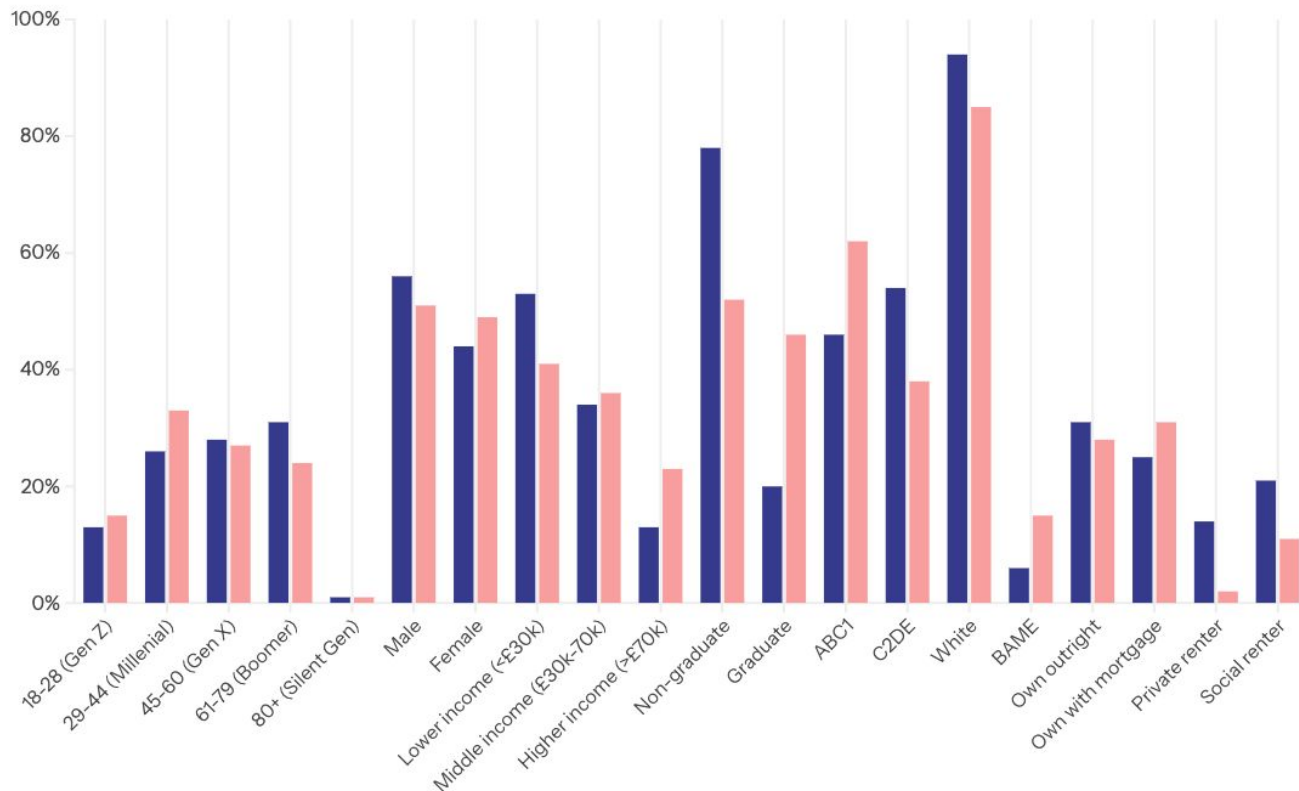
■ Reform curious Labour voters ■ Reform 2024 voters





Demographic profile of Reform curious Labour voters

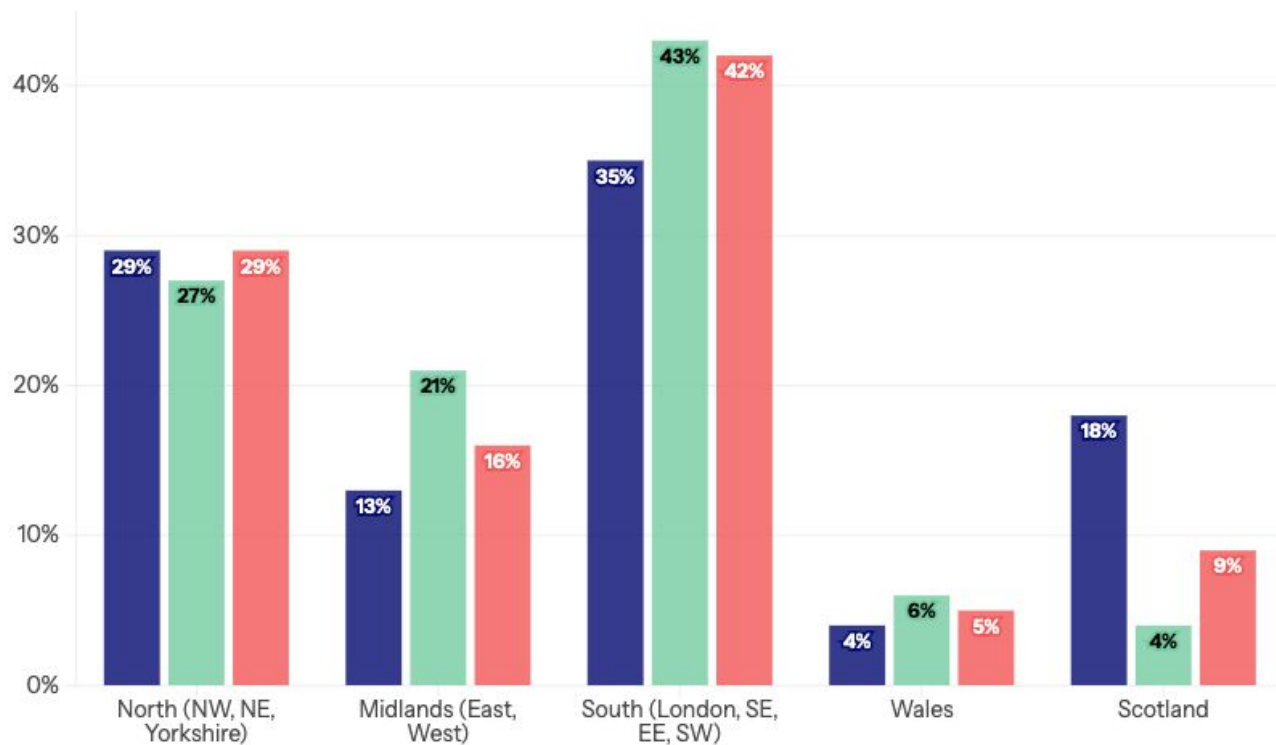
■ Reform curious Labour voters ■ Labour 2024 voters





% of political group living in each part of the country

■ Reform curious Labour voters ■ Reform 2024 voters ■ Labour 2024 voters



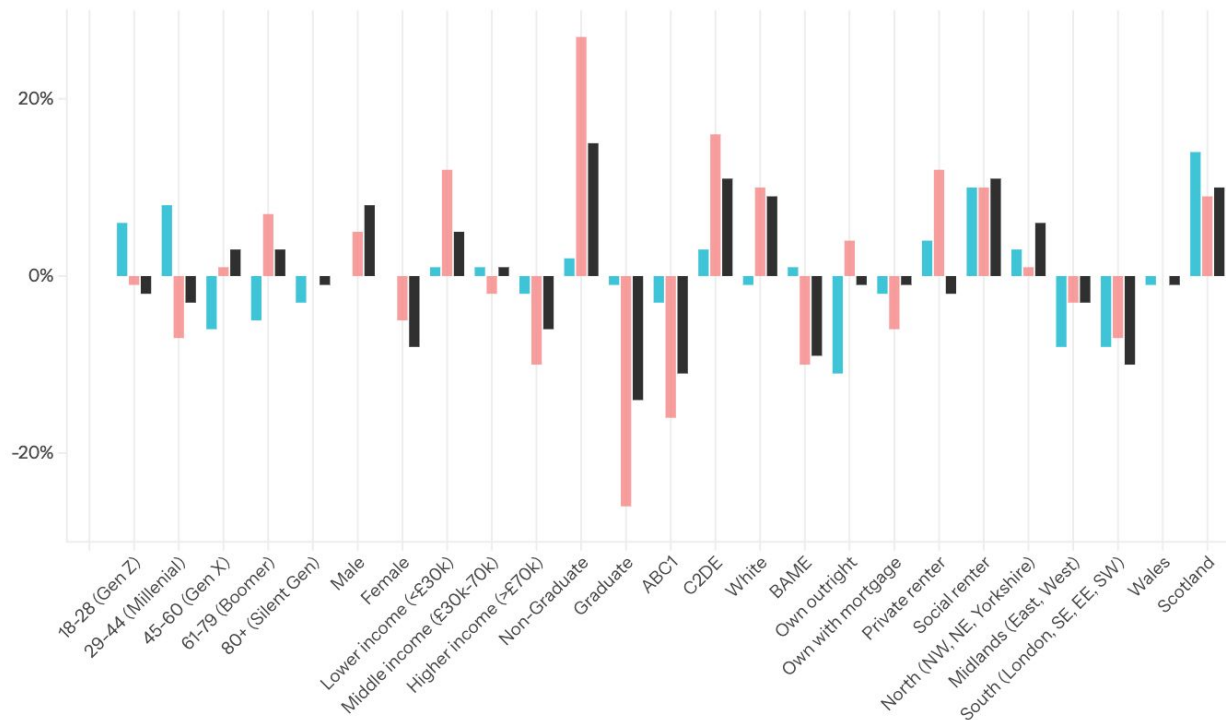


Demographic differences of 'Reform curious Labour voters' and wider Reform and Labour vote

Compared to the wider Labour vote, Reform curious Labour voters are significantly less university graduates and more lower income and more white

Below 0% = less likely to be this attribute. Above 0% = more likely.

■ Compared with Reform 2024 vote ■ Compared with wider Labour 2024 vote ■ Compared with all UK voters

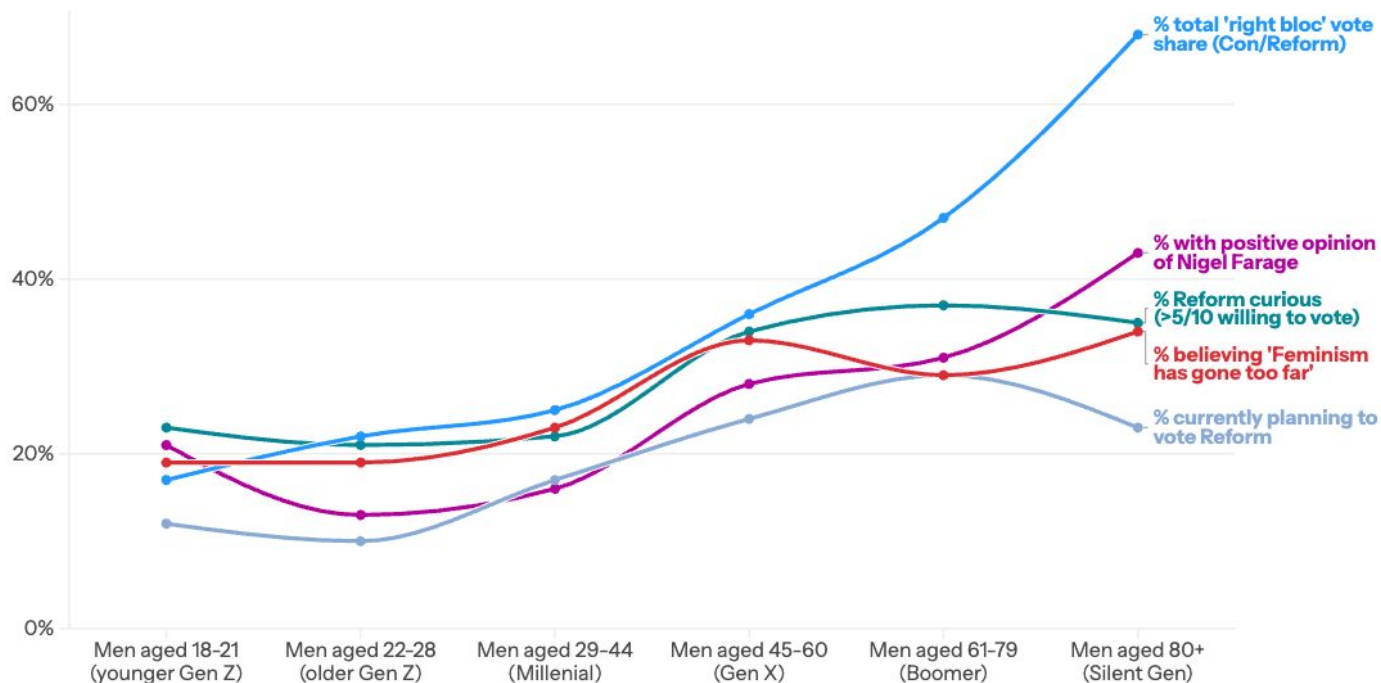




How real is the phenomenon of 'fash youth' in the UK? A look at male attitudes by age

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.

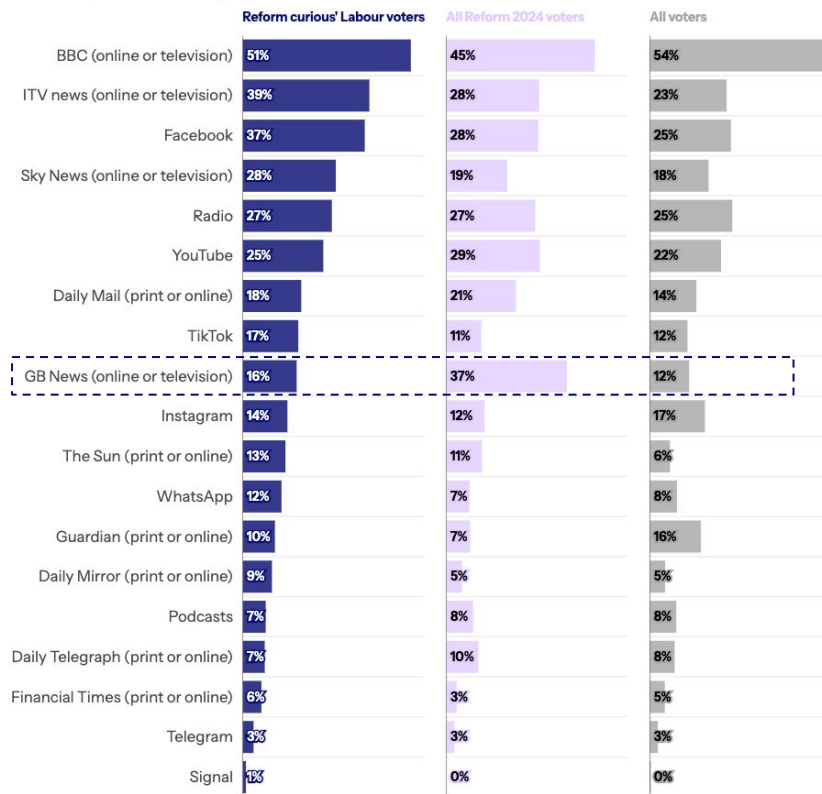
Anti-feminist sentiment judged by paired statement: "Where would you place your view and the view of these parties on this scale? The fight for feminism and women's equality in Britain has not gone far enough – there are still many battles to be won" OR "In general, feminism has gone too far in this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



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."





Understanding the social values of Reform curious Labour voters

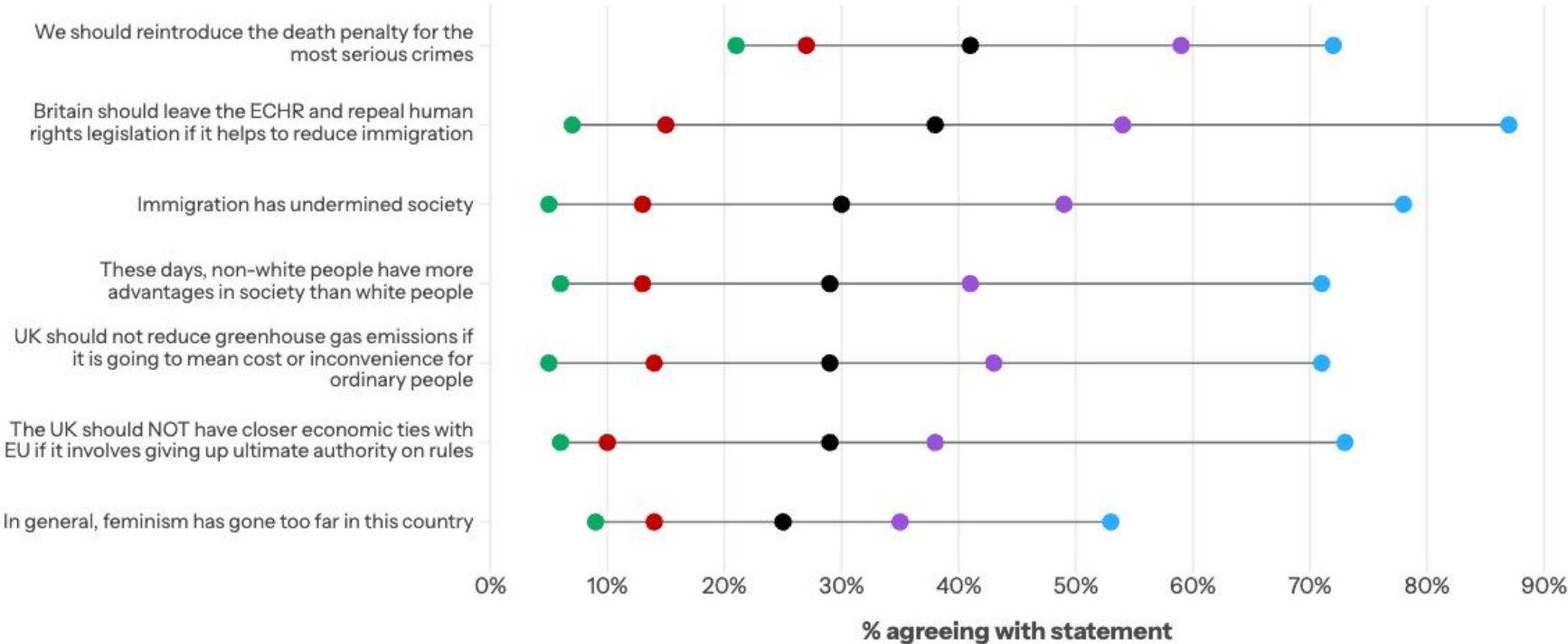
They are classically 'cross-pressured' in their views – closer to Reform on culture, closer to Labour on economics/role of the state.

Anti-system sentiment is also very high with this group.



Cultural and social values of 'Reform curious Labour voters'

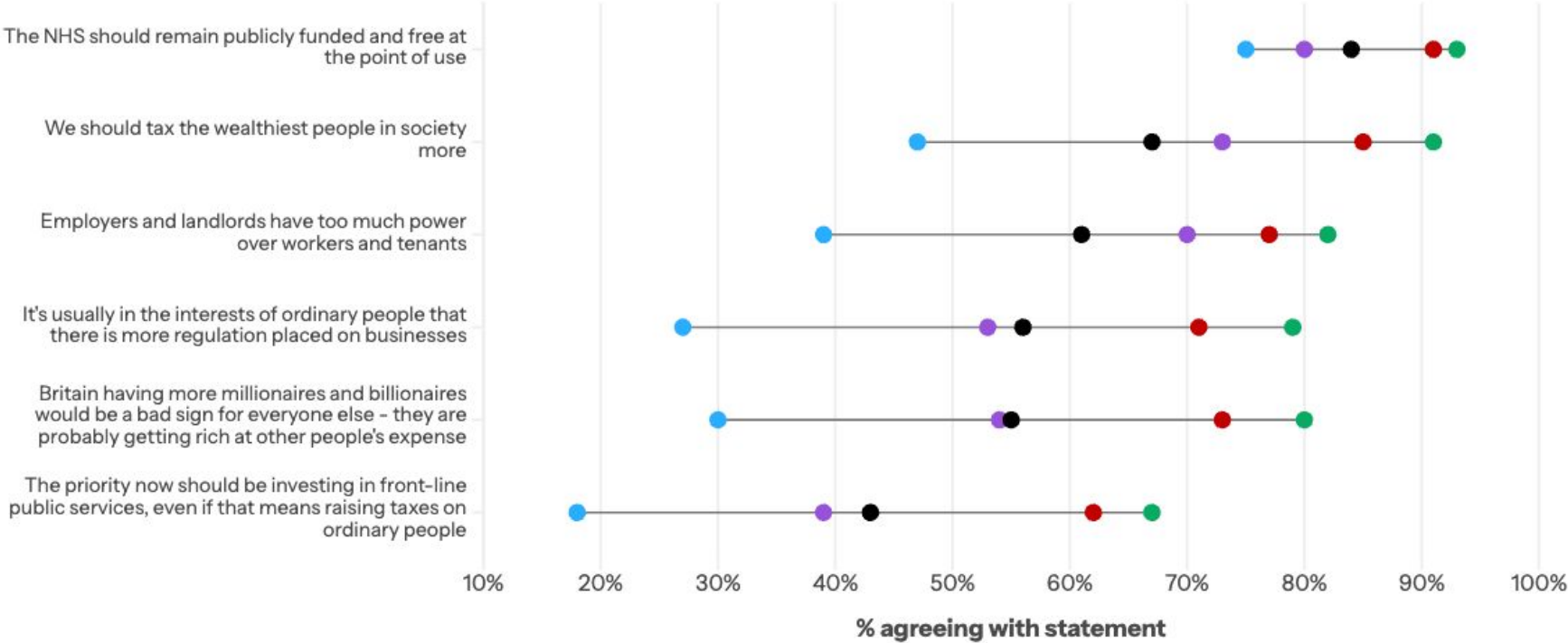
Reform curious Labour voters Reform 2024 voters Labour 2024 voters Green curious Labour voters All voters



To avoid agreeability bias, these were paired statements with respondents asked to choose between a liberal leaning and conservative leaning statement on the issue. The graph shows the % opting for the conservative leaning statement. The sample includes those who choose 'neither' but excludes those who said don't know.
"Which of these comes closest to your view, even if none captures it exactly?"

Economic values of 'Reform curious Labour voters'

● Reform curious Labour voters ● Reform 2024 voters ● Labour 2024 voters ● Green curious Labour voters ● All voters



To avoid agreeability bias, these were paired statements with respondents asked to choose between a left leaning and right leaning statement on the issue. The graph shows the % opting for the left-leaning statement. The sample includes those who choose 'neither' but excludes those who said don't know.

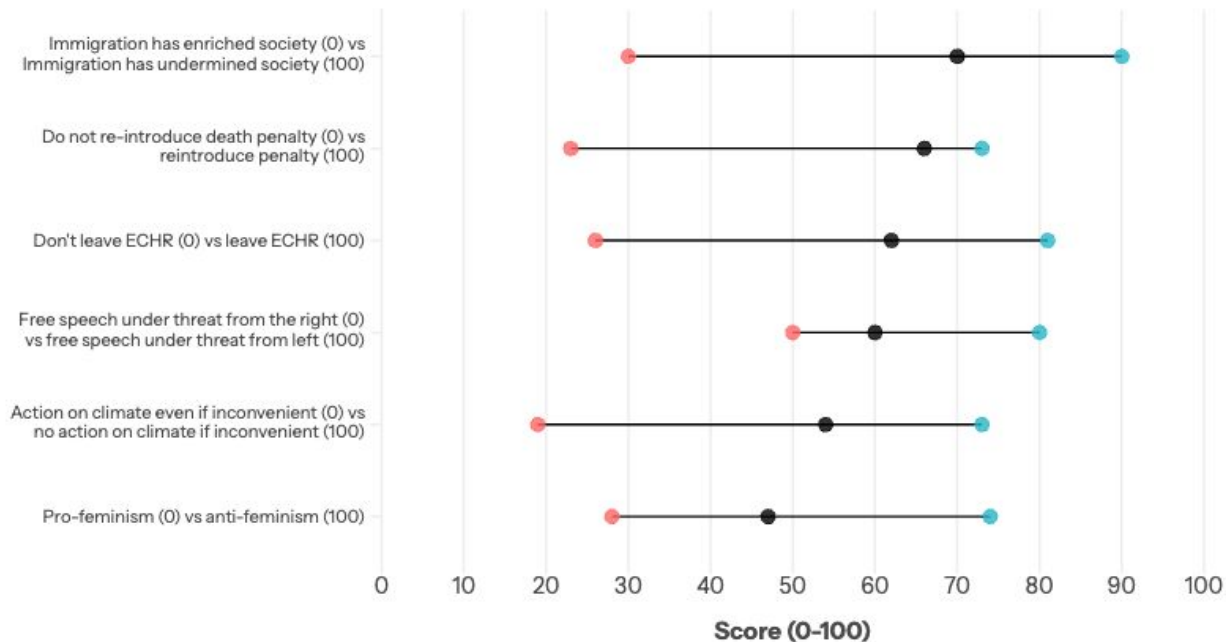
"Which of these statements comes closest to your view, even if none captures it exactly?"



Where do Reform voters place the values of other parties?

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

- Where 'Reform curious Labour voters' put their own views
- Where 'Reform curious Labour voters' place typical Labour MP
- What 'Reform curious Labour voters' voters place typical Reform MP



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.

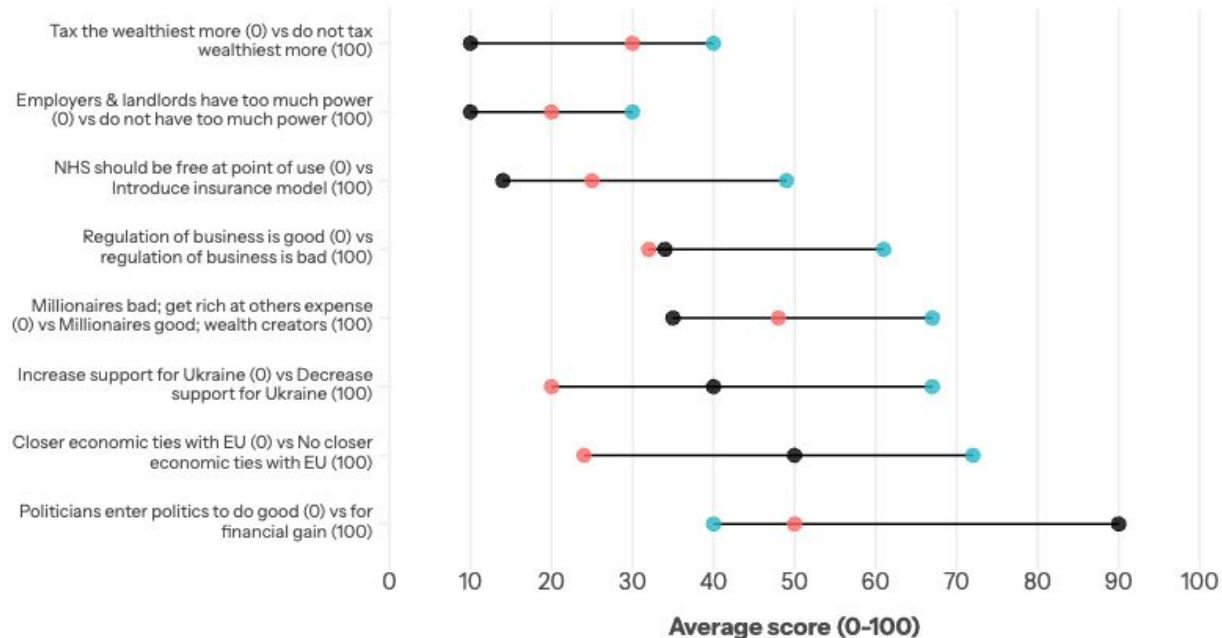
"Where would you place your view and the views of these parties on this spectrum?"



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.

- Where 'Reform curious Labour voters' put their own views
- Where 'Reform curious Labour voters' place typical Labour MP
- What 'Reform curious Labour voters' voters place typical Reform MP



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.

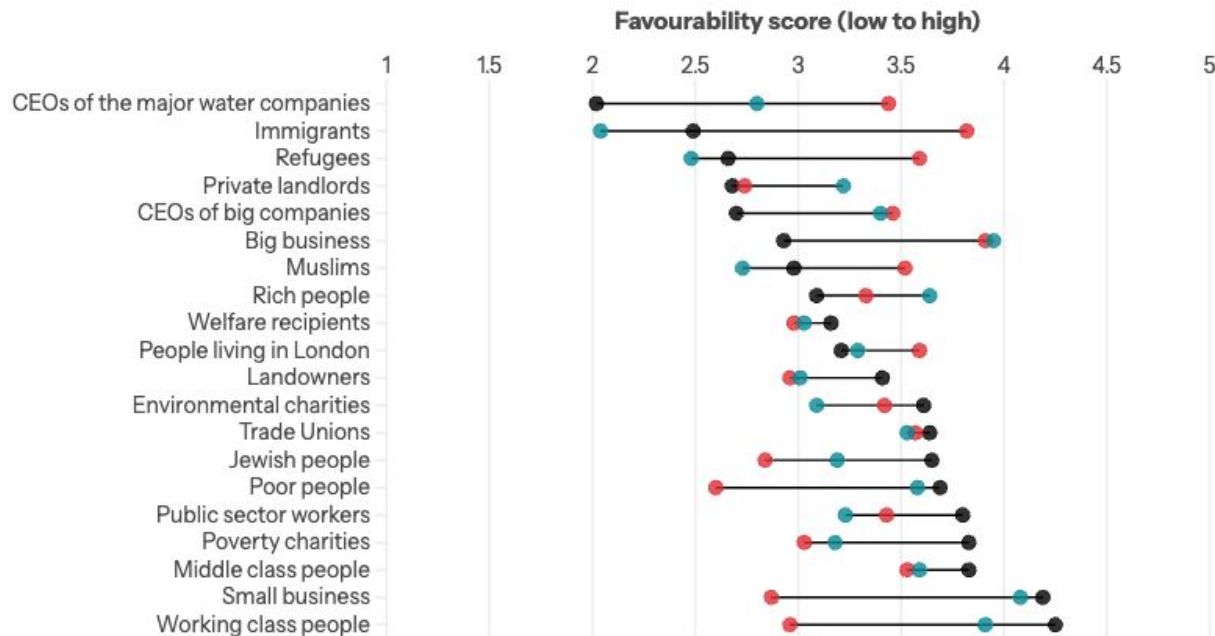
"Where would you place your view and the views of these parties on this spectrum?"



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.

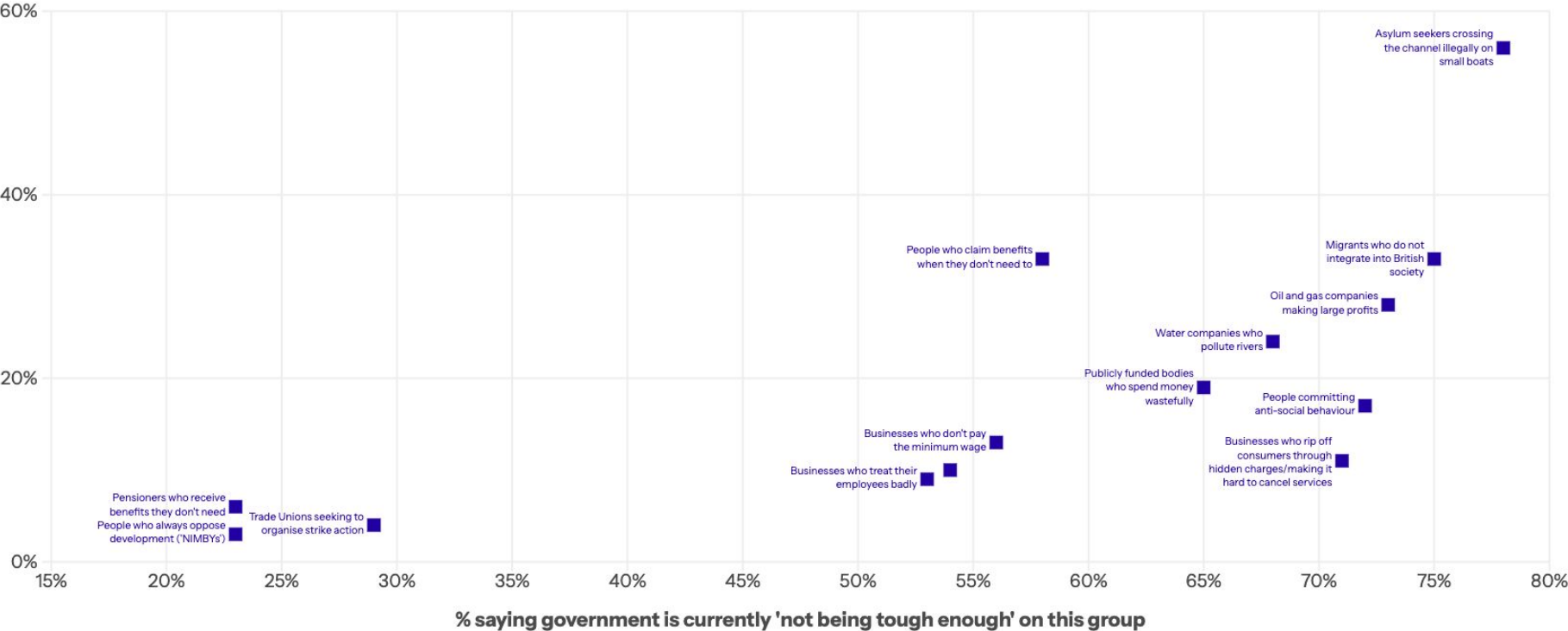
● Own view ● View of average Lab MP ● View of average Reform MP



"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.

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

% choosing this group as top 3 groups they'd like to see government get on tough

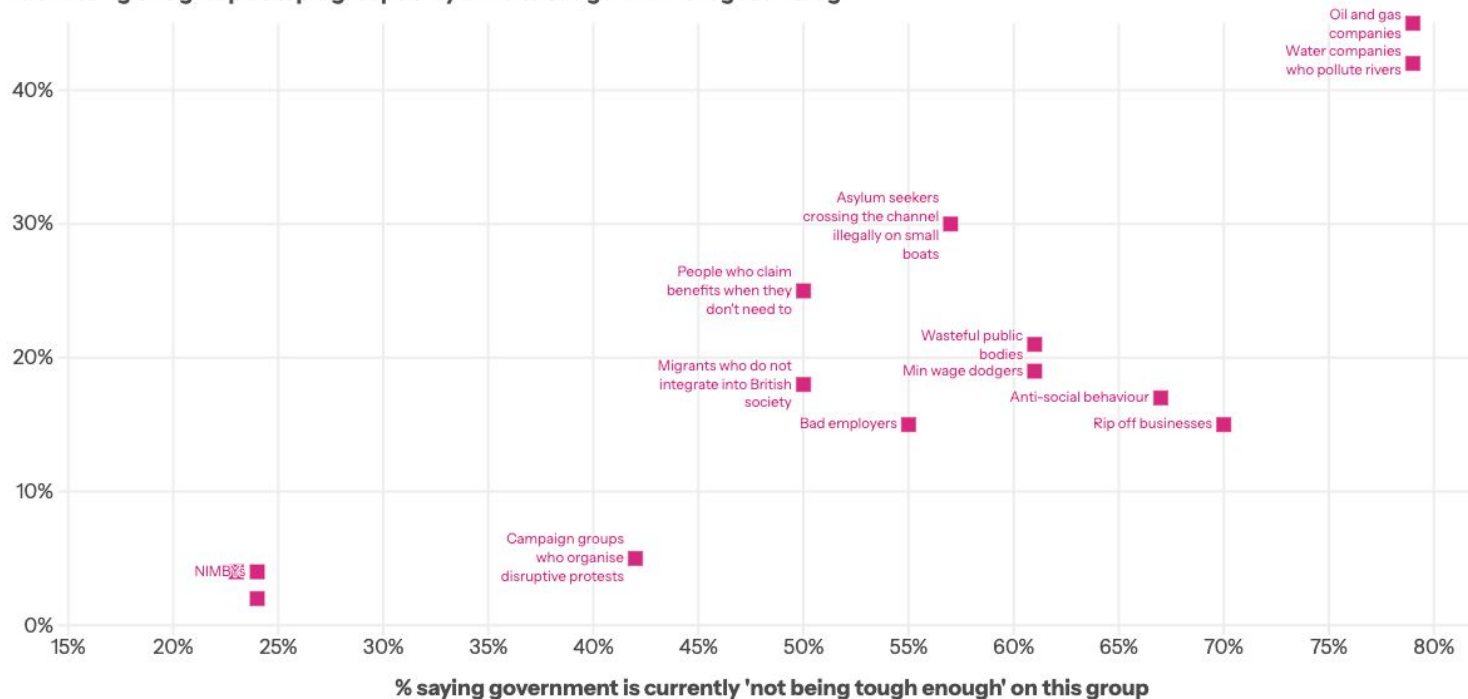


"Sometimes people talk about governments being 'tough' on groups within society. If you had to prioritise, which of the below groups would you most like to see the Labour government be tough on? Pick select up to three options." // "And based on what you've seen in the news or elsewhere, is the government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



Who would **Labour defectors** (those who have left Labour since GE2024) like to see government be tougher on?

% choosing this group as top 3 groups they'd like to see government get on tough



"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?"



What issues are salient to these voters? What pushes and pulls them to and from Reform?

At the moment, it is these voters' cultural values which are most salient to them - driven by discontent over small boats especially.

But there is also a wider sense of frustration and 'we might as well roll the dice'.

Elsewhere, proximity to Trump/Musk is a weakness for Reform with these voters.

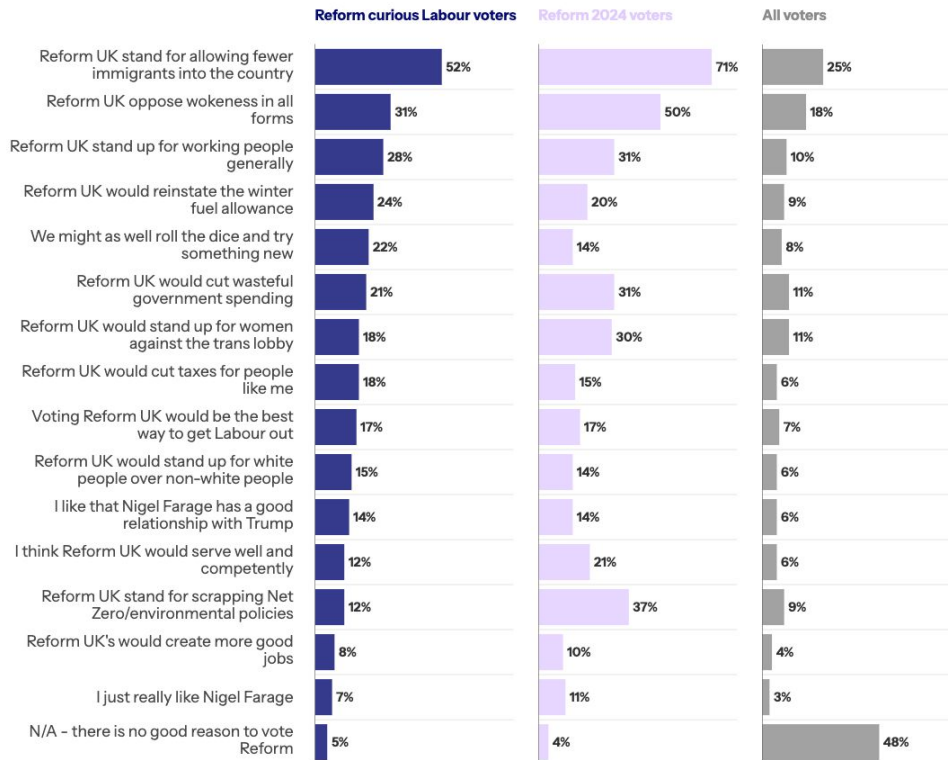




Reasons to vote Reform

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"

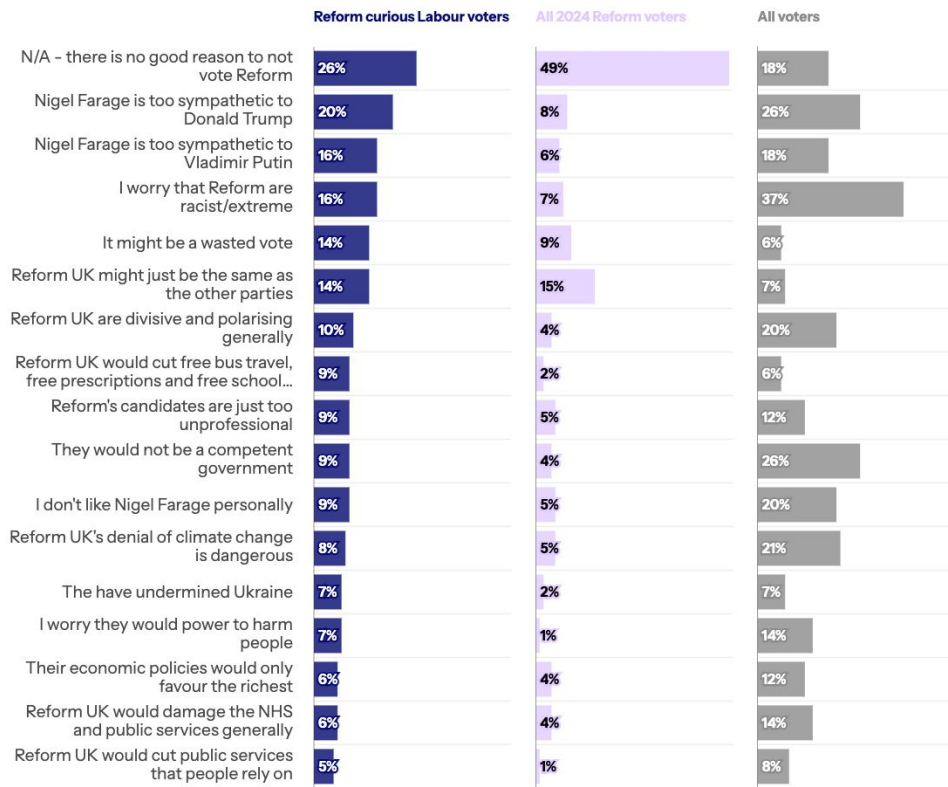




Reasons to NOT vote Reform

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."

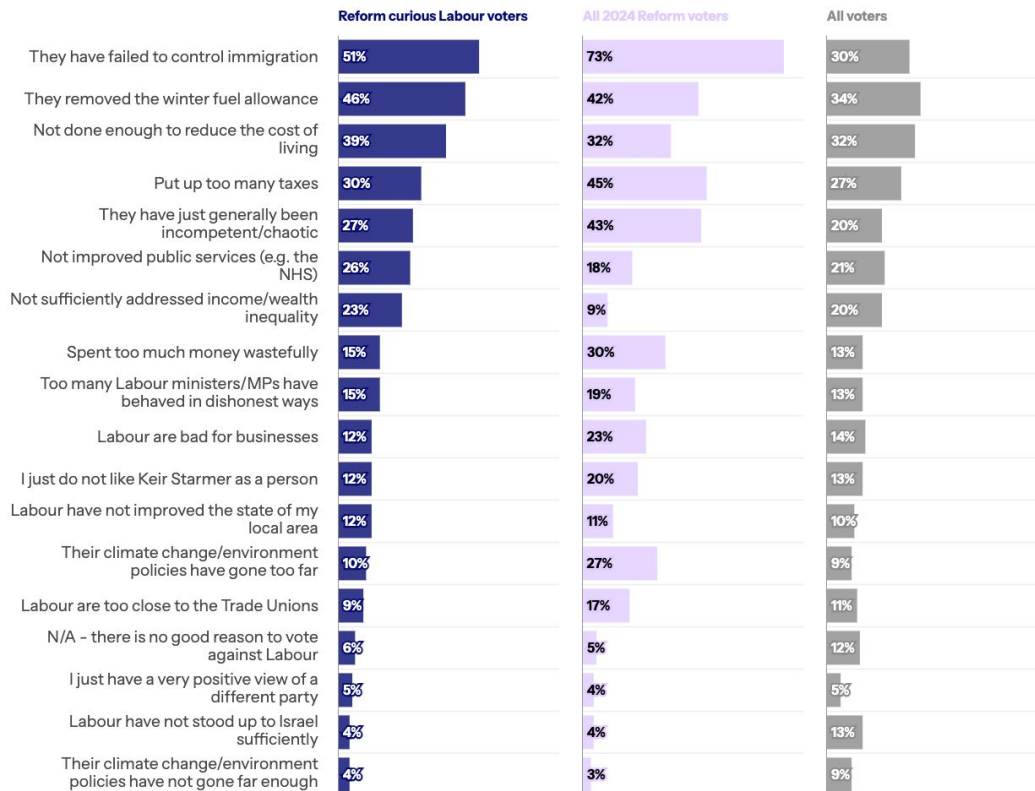




Reasons to NOT vote Labour

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."

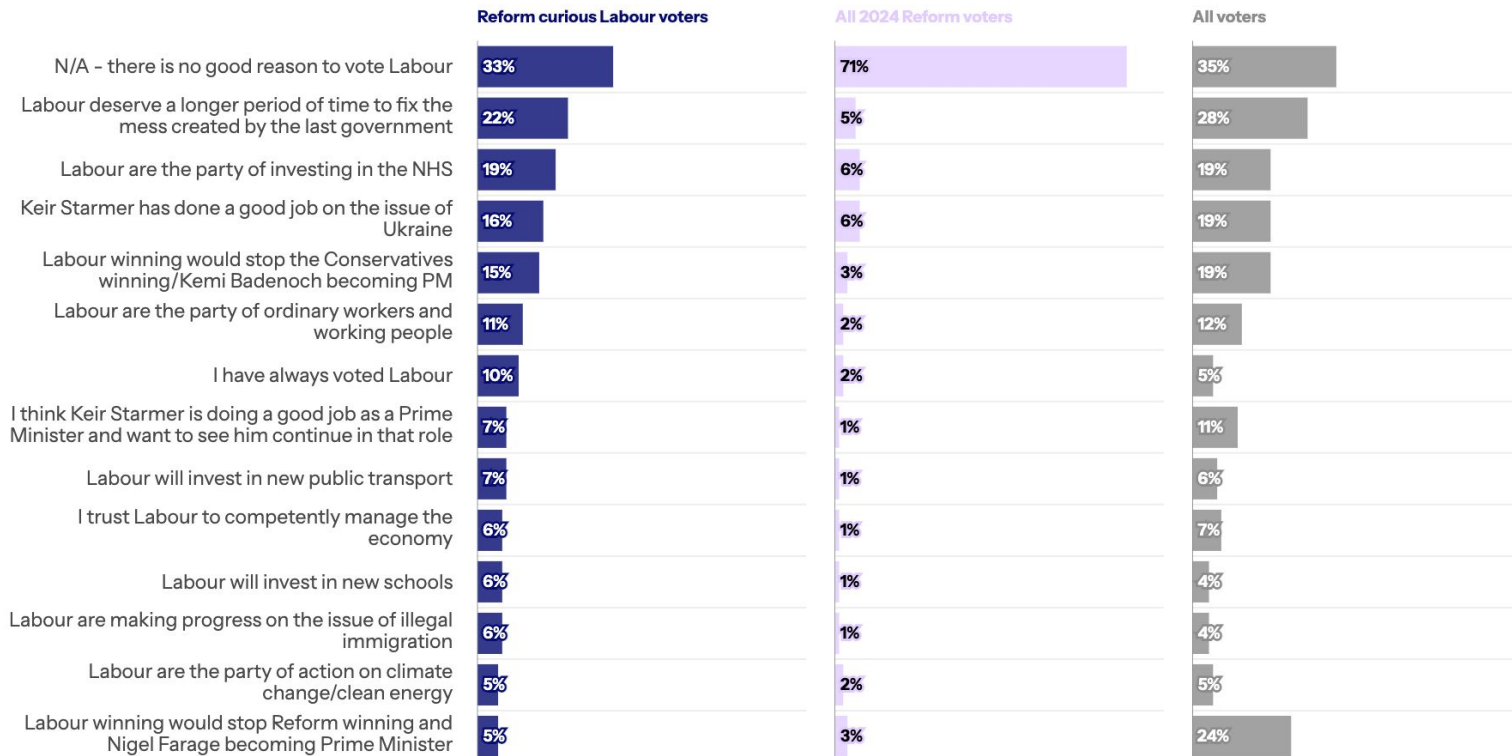




Reasons to vote Labour

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."



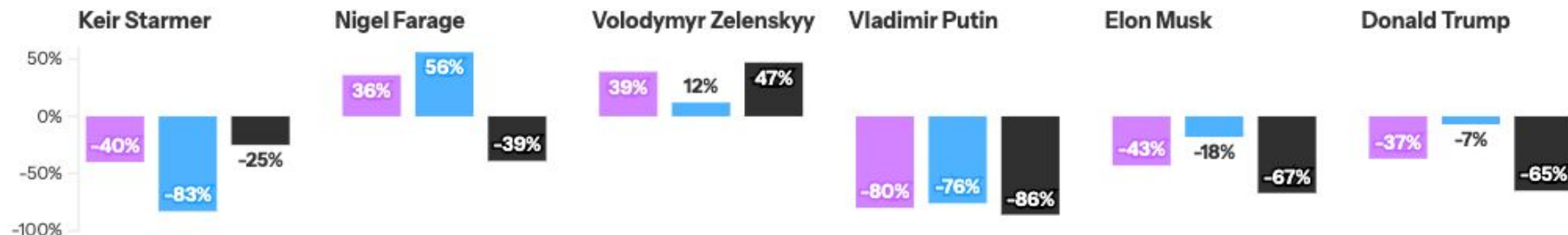


Views of leadership figures

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)

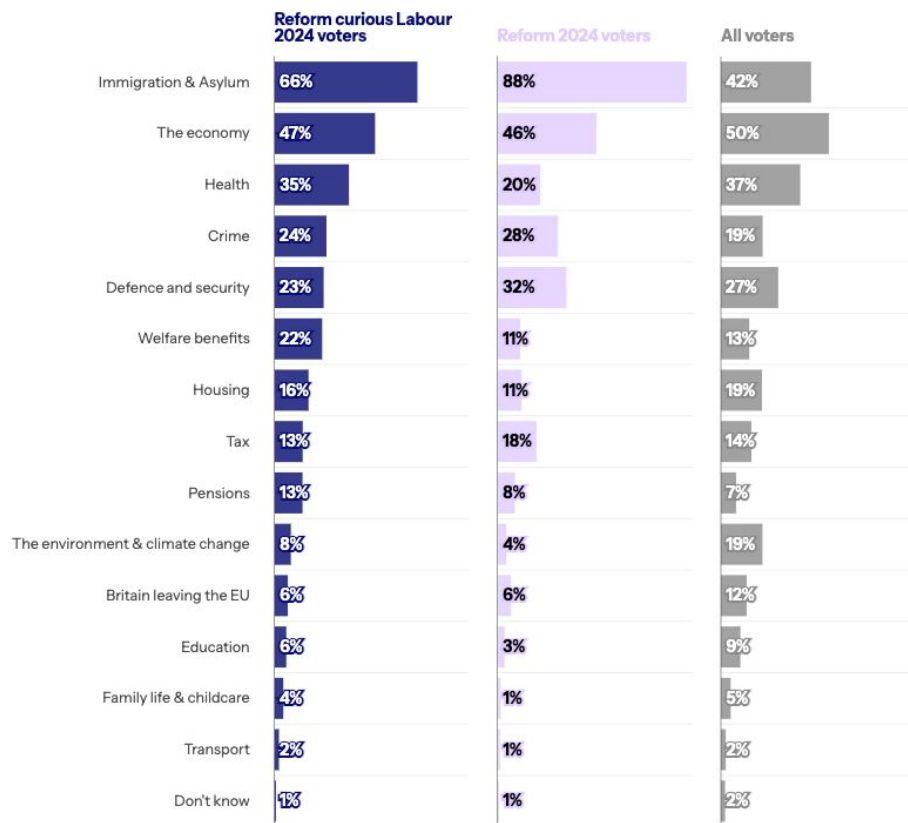
■ Reform curious Labour voters ■ Reform 2024 voters ■ All voters





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?"

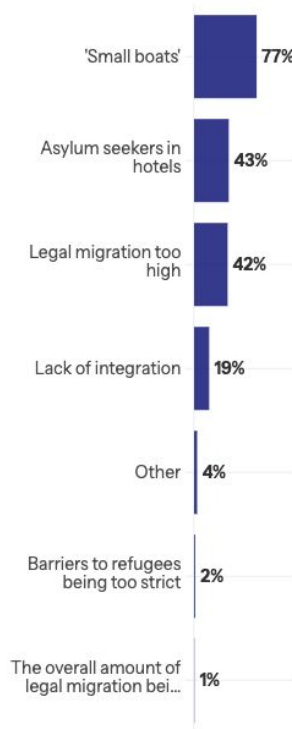




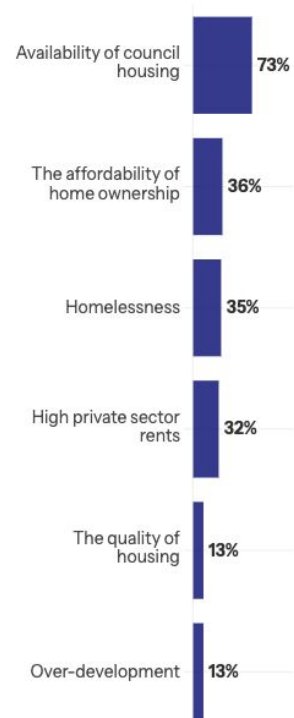
What is the meaning of different 'top issues' to Reform curious Labour voters who pick them as priorities for the country?

"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"

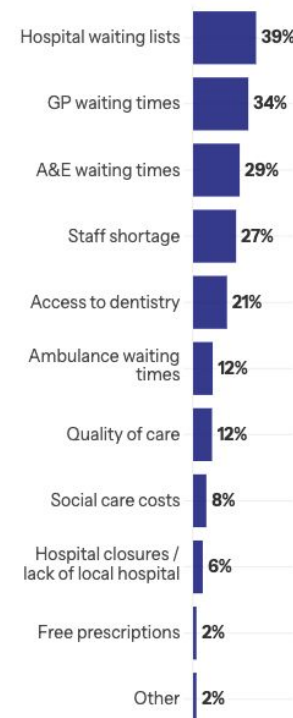
Immigration



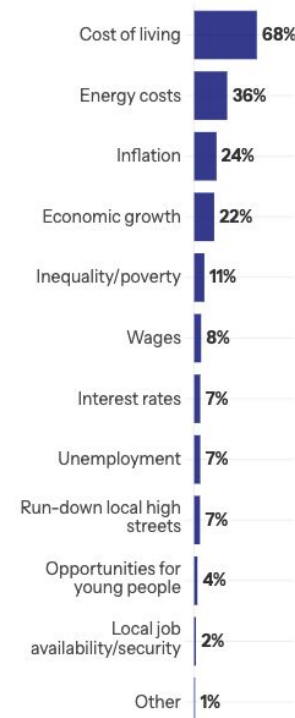
Housing



Health



Economy

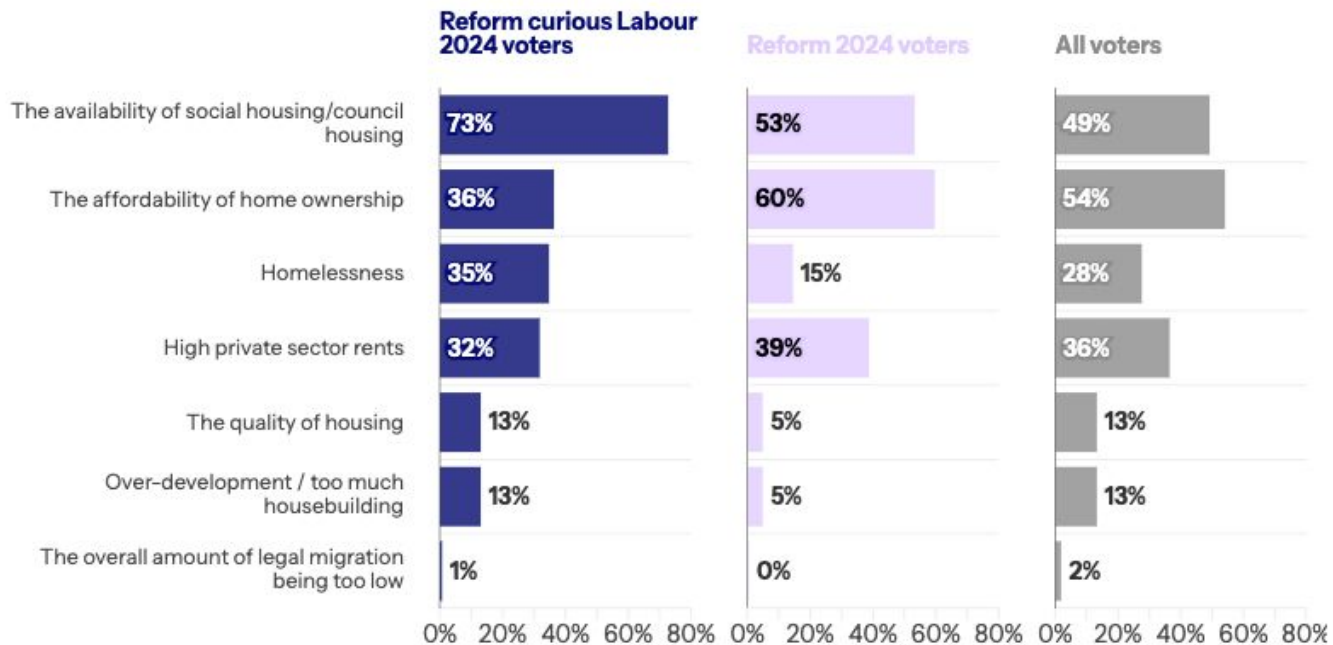




Top issues within housing

Among those choosing housing as a top issue, Reform curious Labour voters are much more likely to be concerned by the shortage of council/social housing

"[Only for those choosing housing as a top issue] When it comes to housing, which of these are the most important issues facing the UK? choose up to 2"

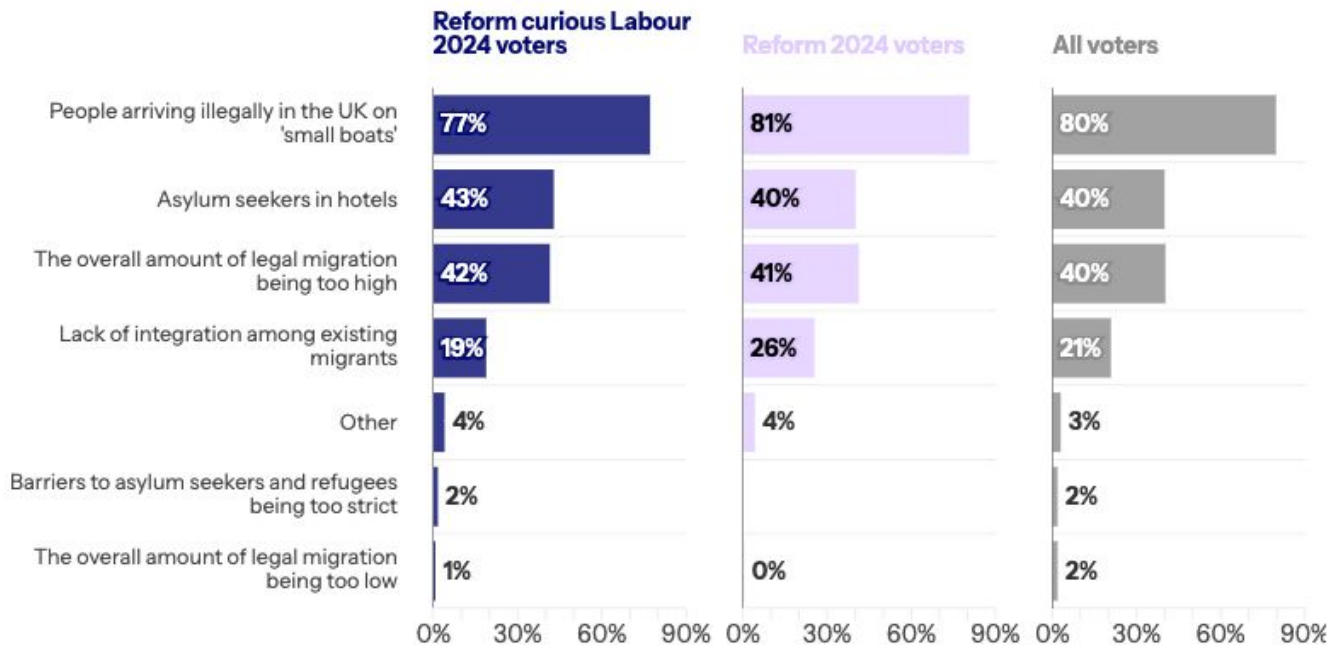




Top issues within immigration

Among those who choose immigration as a top 3 issue, it is in fact asylum which overwhelmingly dominates their concerns

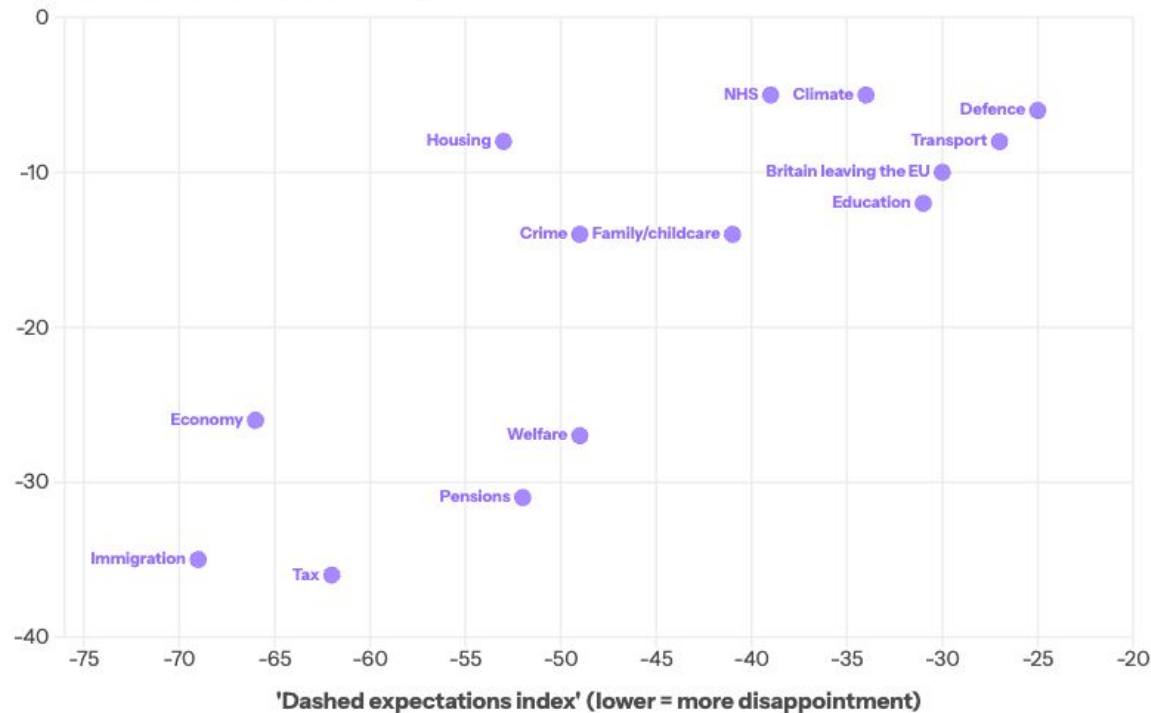
"[Only for those choosing 'immigration' as a top issue] When it comes to immigration, which of these are the most important issues facing the UK? Choose up to 2"





On what issues are Reform curious Labour voters most/least disappointed with Govt, and where are they most/least pessimistic?

'Optimism for future index' (high to low)



'Optimism for future' index = % who expect this to get better in coming years minus those who expect it to get worse. 'Dashed expectations' index = % of those who think the Govt has so far done better on this than they expected minus those who think they have done worse than they expected.



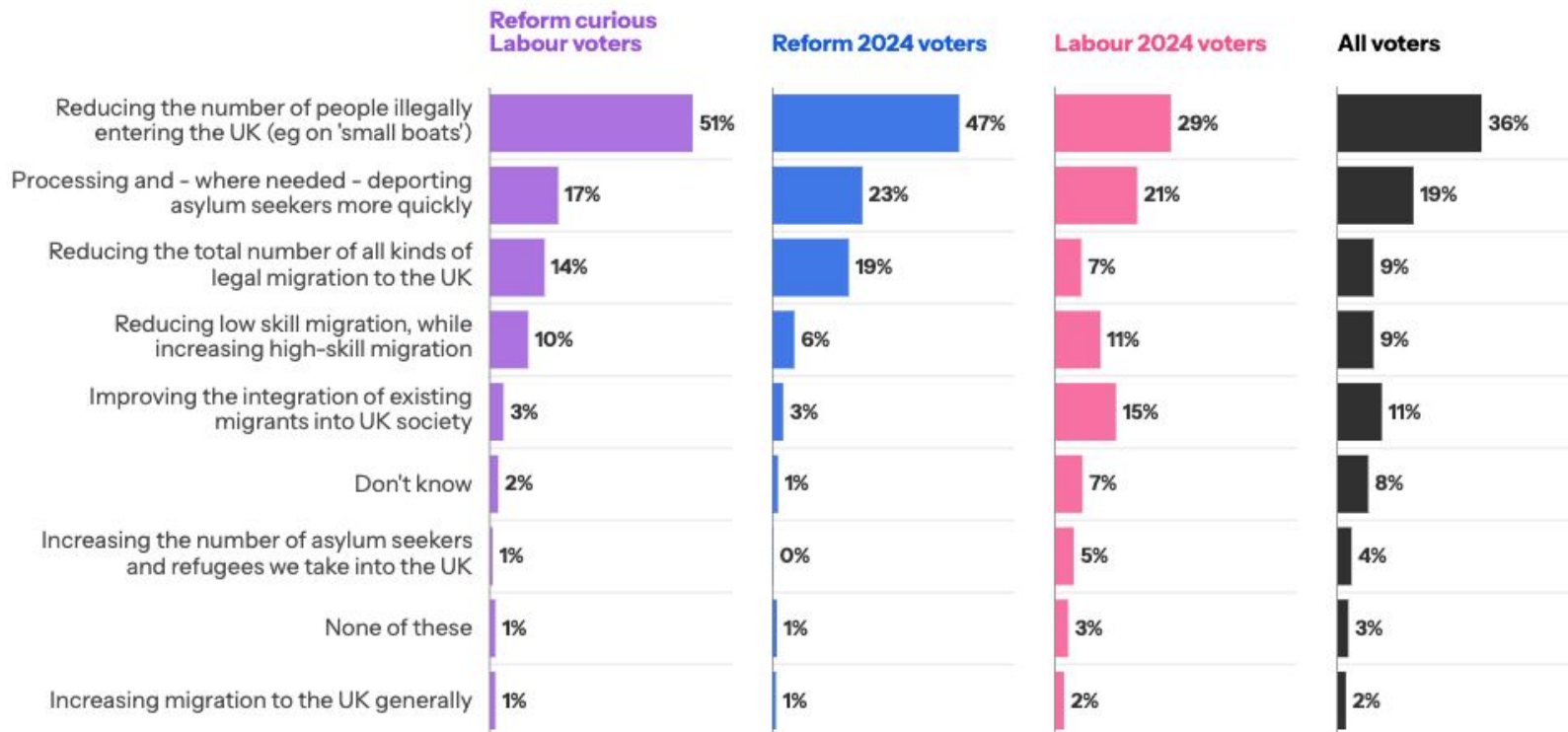
Issue focus: Immigration

For the most part it's small boats/asylum driving these voters discontent on migration, less so legal migration.





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





Issue focus: Net Zero

While they care about it less than the wider Labour vote, Reform curious Labour voters are not anti Net Zero in the way core Reform voters are.

There is currently no evidence that these voters blame the clean energy transition on higher energy bills or lower economic growth in the way the wider Reform vote does.



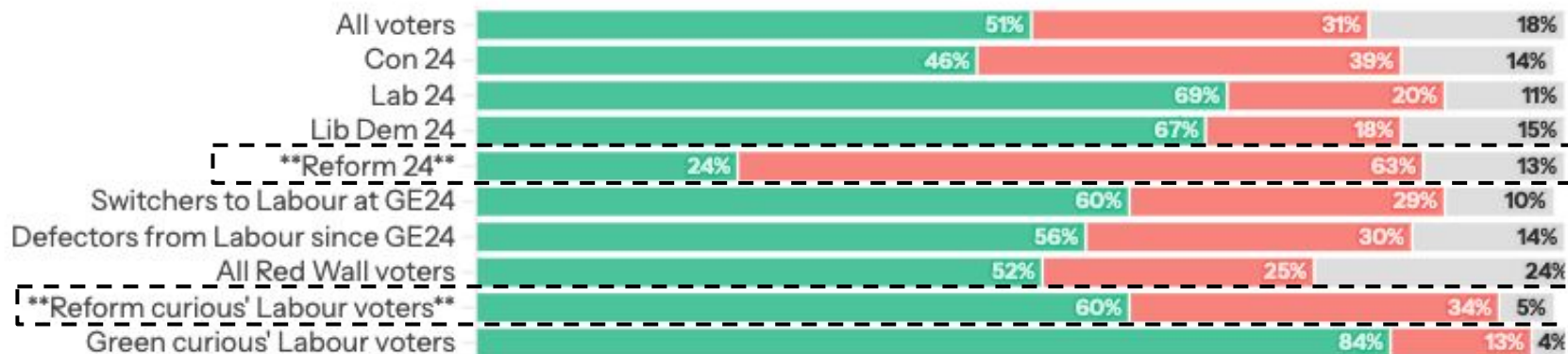


Top line view of Net Zero

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?"

Positive Negative Don't know



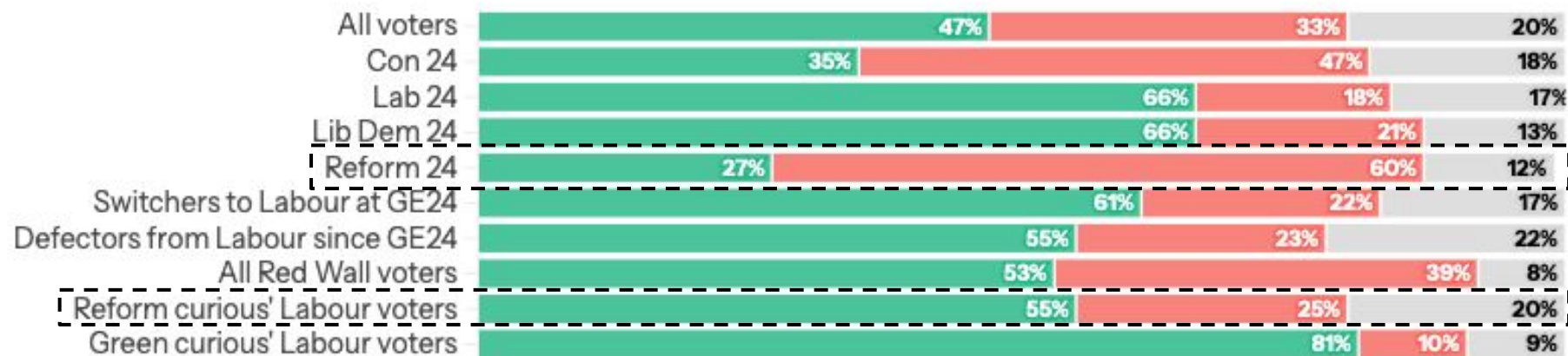
Opinium for LCEF, April 2025, 3,000 UK adults.



"From what you know of it, do you have a positive or negative view of Net Zero?"

[unprompted Net Zero favourability]

Positive Negative Don't know



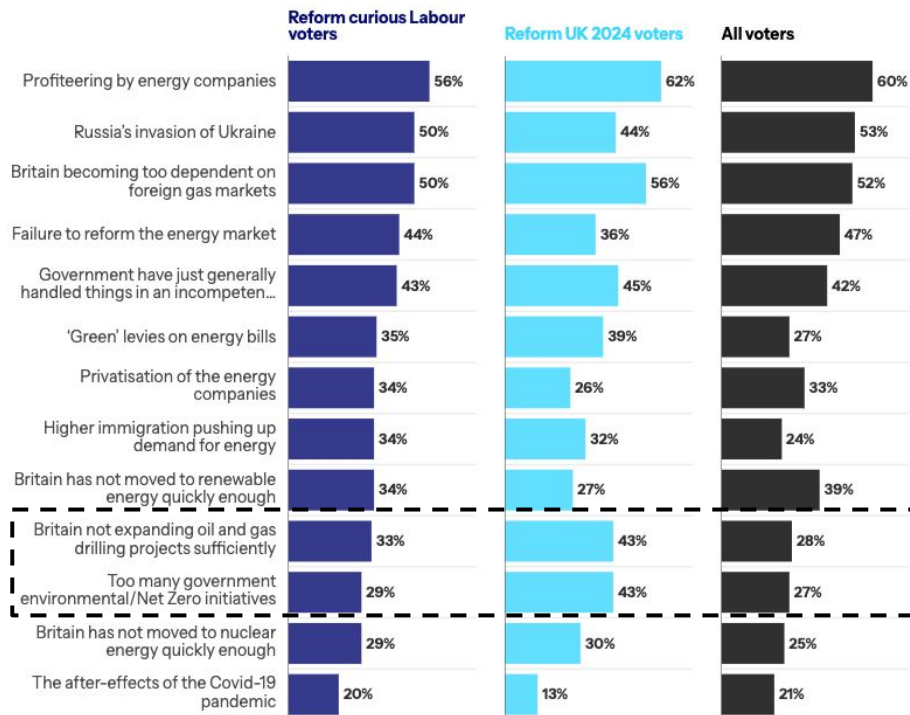
(Only showing results for those who correctly identified Net Zero as connected to climate/energy)



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.

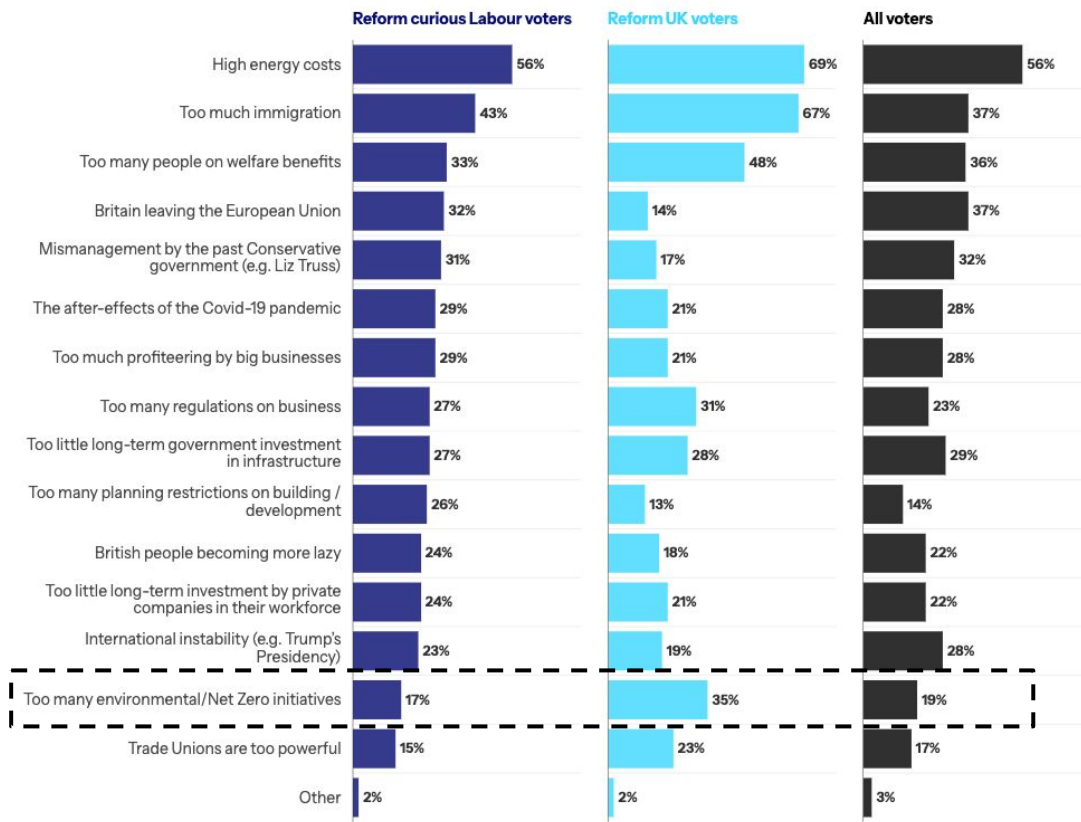
"Below is a list of things some people have suggested might explain rising energy bills in the UK. Which of these, if any, do you find most convincing as reasons for rising energy bills? Choose up to 5"





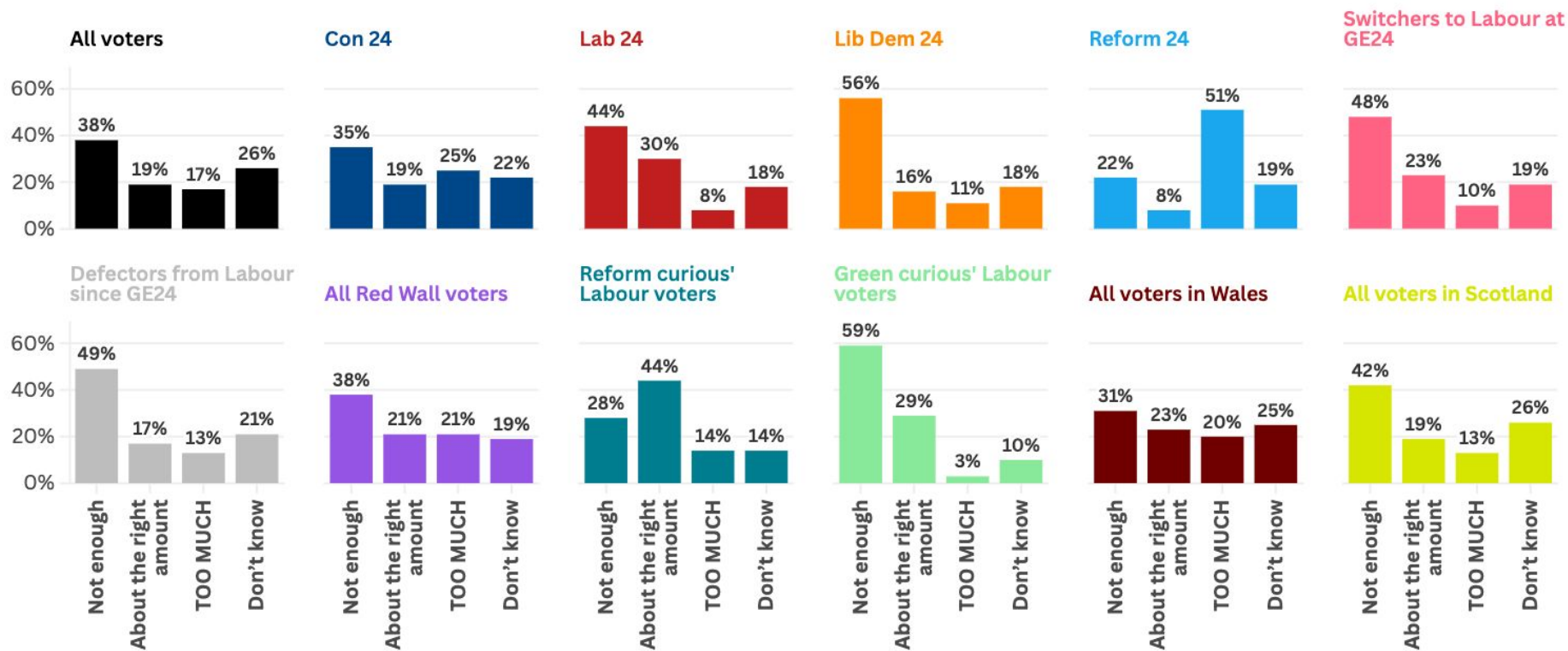
Explanations for low economic growth

"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"



'On the subject of climate change, is the Labour government doing not enough, about the right amount or too much?'

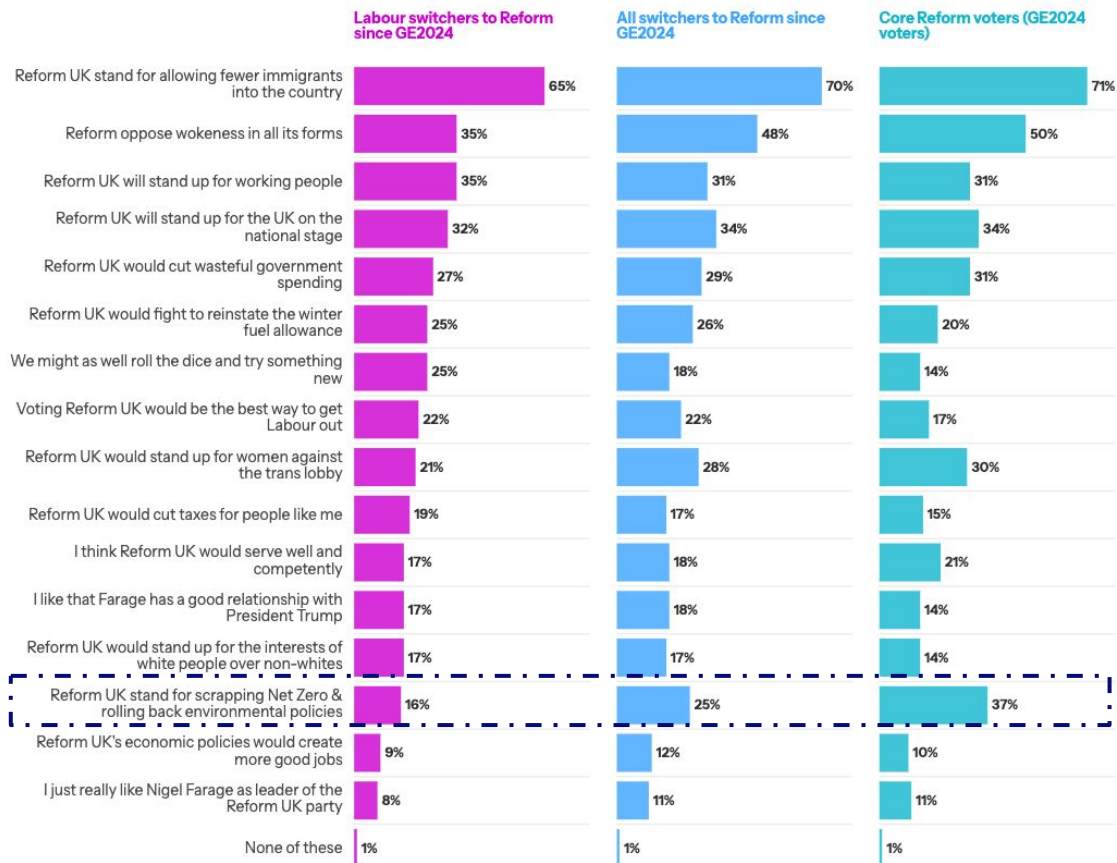
Once again, core Reform voters are the only group of voters who think the government is doing too much on climate change. This is not a view held among other voter groups, especially swing voters within the Labour coalition.





Why are people voting Reform?

"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."





Experiment no 1: how can Labour unite its coalition?

‘Moderate positions on culture, populist positions on economics’ best re-assembles Labour’s winning 2024 coalition

01



Conjoint experiment: Labour vs Reform and Greens

- n=1000 Labour 2024 voters conducted via NorStat in April 2025.
- Respondents saw three policy platforms, one branded as Labour, one Reform and one Green.
- Labour policy was varied within six broad categories: asylum, immigration, Net Zero, welfare, wealth taxation and public services. In total 19 policies were tested across these categories in hundreds of possible combinations.
- For efficiency, Reform and Green were fixed in positions we know they have, or at least can make defensible assumptions about.
- Respondents were asked which party they would vote for if the parties stood on the policy platform they saw in front of them. In the analysis we see which policies were most vote moving in different directions.
- The intention here is to try and simulate some of the three-party dynamics to voter flow, but also surface the 'balancing dilemmas' Labour has in keeping its 2024 vote together
 - We wanted to surface the policies that hold together both sides of the Labour coalition best, and those which lead to the most leakage in either direction



All policies seen

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
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
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



One example variation, as seen by a survey respondent

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

💡 Version: 51

Party	Labour	Reform	Green
Immigration	Significantly reduce all immigration, introducing a hard cap of 150,000 people a year	Put a complete stop to all immigration	Increase overall immigration from current levels
Wealth taxes	Keep taxes on the wealthiest the same as now	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	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
Public services	Maintain the current levels of 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	Go slower in the UK's efforts to limit climate change, moving to renewable energy more slowly	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	Maintain the current 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

>>



How to interpret the numbers you are about to see (centred marginal means):

The more negative a score a possible Labour policy position receives, the more it's a net vote loser within Labour's 2024 election winning coalition (with either Reform or Greens benefiting).

The higher the positive score, the more it is a net vote winner it is (with Reforms or Greens losing out).



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

Extreme positions on asylum and immigration – either very liberal or very conservative – lose Labour more of its vote than they retain (or else cancel themselves out). Liberal positions see bleeding to Reform, very conservative positions to the Greens. 'Middle options' hold things together, even if unspectacularly. We see none of these coalitional trade-offs on Net Zero, where confident signalling helps Labour retain voters from the Greens without losing voters to Reform, since Reform curious Labour voters have no strong views either way on climate policy.

How to read these numbers: the more negative a score a policy receives, the more it's a net vote loser within the Labour coalition. The higher the positive score, the more a vote maximiser it is. Three-party conjoint experiment, impact of policy on probability of Labour vote choice (quantity of interest: marginal means vs category average).

Asylum

Deport all asylum seekers, repeal ECHR

-1%

Quicker processing, allow legitimate cases to stay

4%

Liberalise asylum rules, allow more refugees

-3%

Immigration

Complete stop on immigration

0%

Reduce migration, implement cap of 150k a year

3%

Keep current overall migration numbers but reduce low-skill

2%

Increase overall immigration

-6%

Net Zero

Scrap Net Zero

-6%

Go slower on Net Zero

2%

Go faster on Net Zero

5%

"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.



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

Leaning into populist positions on public services and wealth taxation/inequality are the two biggest vote maximising policies in this experiment. Welfare is not a massive vote net mover either way.

How to read these numbers: the more negative a score a policy receives, the more it's a net vote loser within the Labour coalition. The higher the positive score, the more a vote maximiser it is. Three-party conjoint experiment, impact of policy on Labour platform choice when appearing in Labour platform (quantity of interest: marginal means vs category average).

Public services

Increase spend, NHS & front-line services

9%

Maintain current spend, NHS & front-line

2%

Decrease spend, NHS & front-line services

-11%

Wealth taxation

Wealth tax on top 1%

6%

Keep taxes on the wealthiest same

-2%

Cut wealth taxes on the top 1%

-5%

Welfare

Increase benefits

1%

Maintain current benefits

2%

Cut benefits

-2%

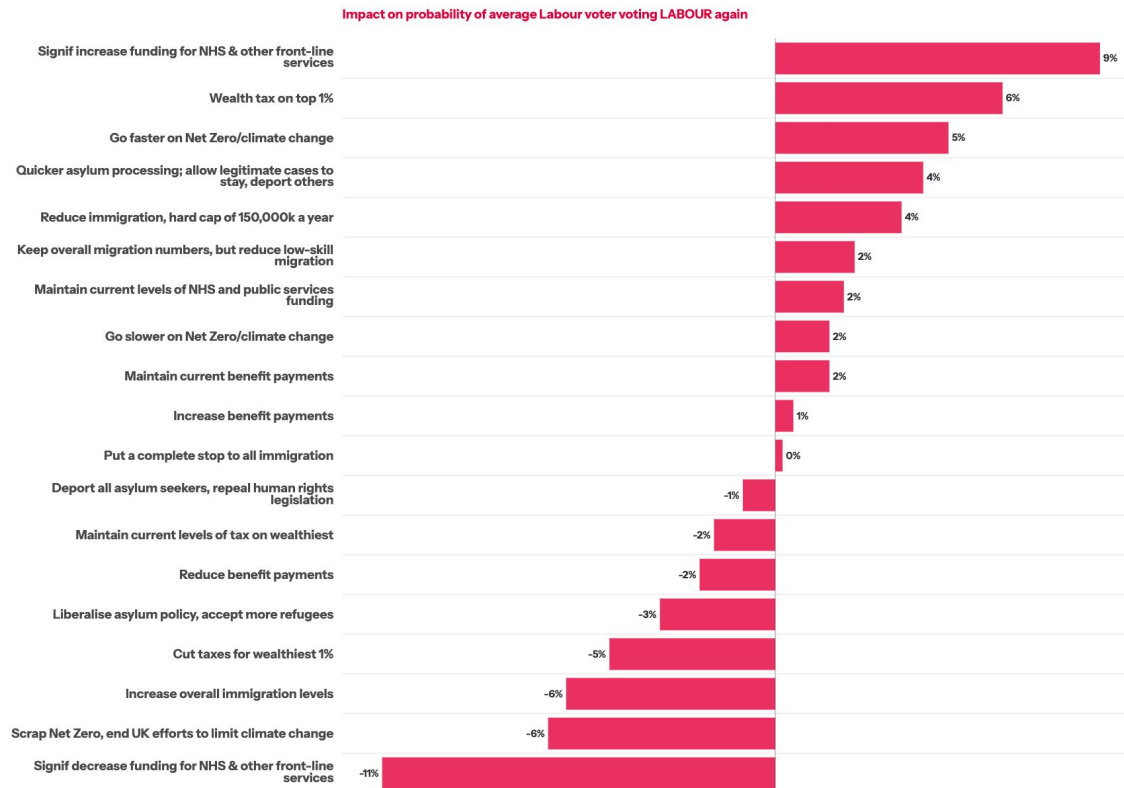
"Imagine that, in the next general election, the Labour party, Reform UK and the Green party stood on the below policy platforms. Bearing in mind your views on the issues...which program would you choose if you had to?". Sample: 1,000 GE2024 Labour voters.



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 policies ranked,

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)

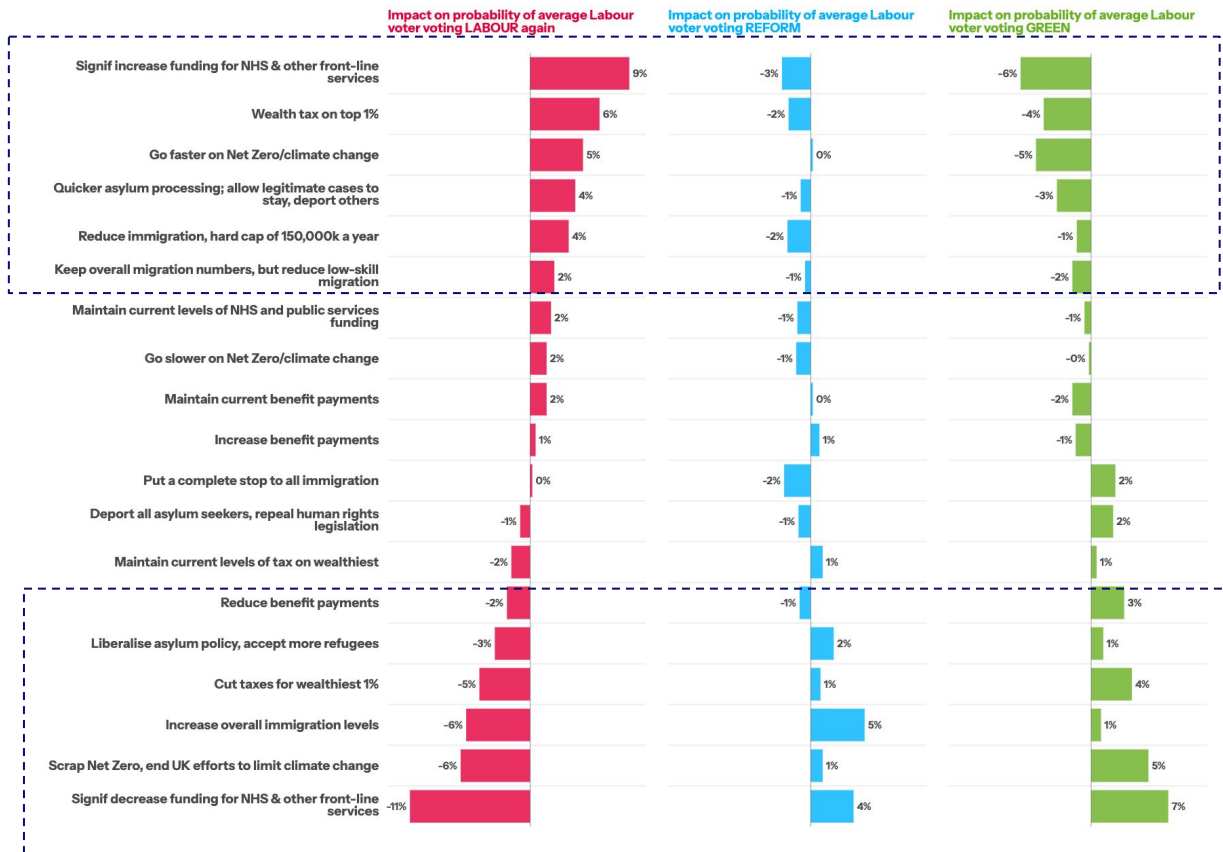




NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - all policies ranked, showing leakage to or retention from Reform & Greens

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)

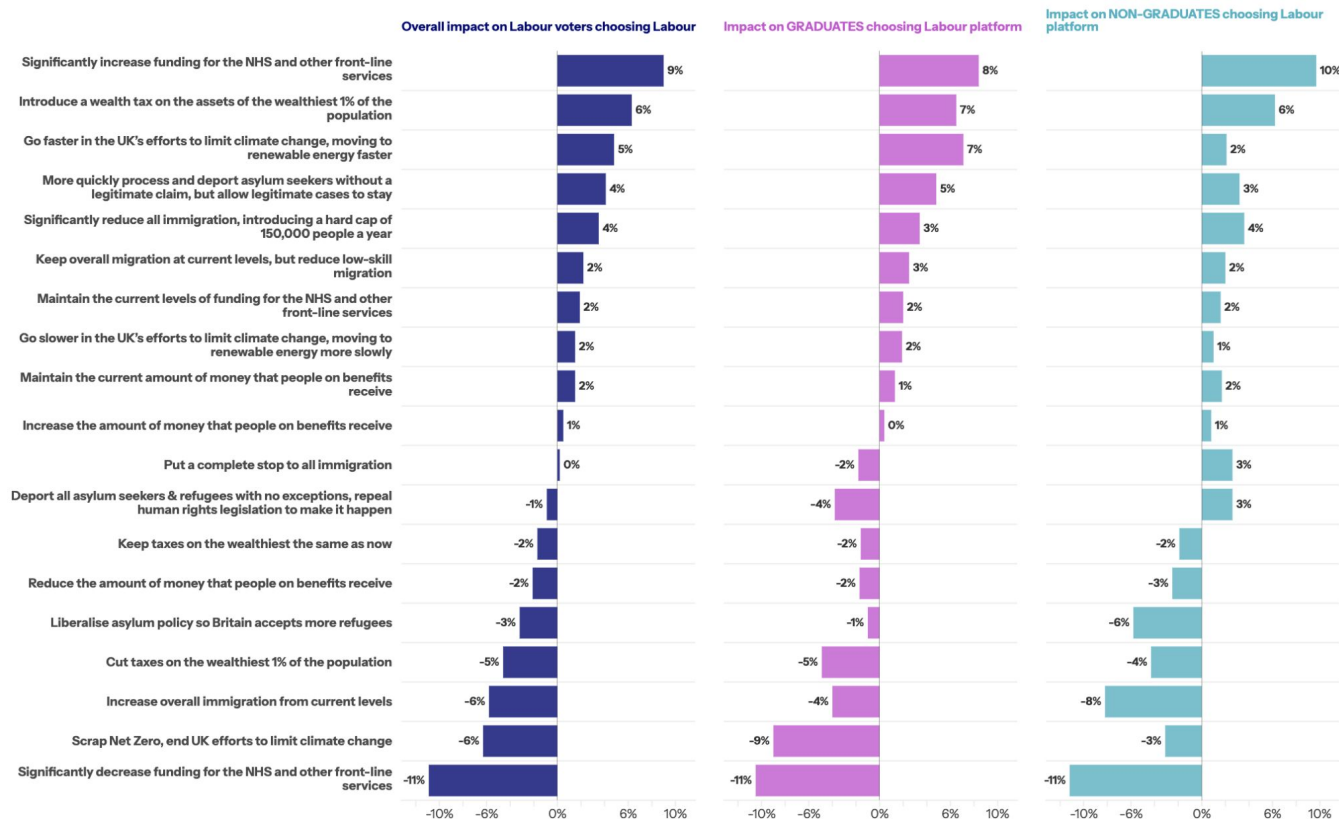




NET IMPACT of Labour adopting policy position on retention of its 2024 voting coalition (with Reform as the alternative on the right, Greens on the left) - all policies ranked, showing leakage to or retention from Reform & Greens

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)





Acknowledged limitations

- There are many reasons people vote for parties and not all of them are to do with ‘position issues’ – some of them have to do with valence (competence, trust, delivery etc), brand loyalty or tactical considerations. We have tried to control for brand loyalty, at least, by including the party brands in the experiment – but no experiment can get at all of these considerations at once.
- The sample here is only Labour voters. For this reason, it’s not possible to know the impact on a wider set of non-Labour voters. For instance, perhaps taking strong progressive positions on some issues energise anti-Labour voters to vote tactically. On the other hand, perhaps anti-migration positions deter Green or Lib Dem voters from voting tactically for Labour against Reform.
- In addition, of course, the electoral benefit on any policy can change if it is implemented badly or generates negative knock-on effects or case studies.
- In general, the best way to interpret this experiment is not to take the policy specifics too literally – most voters don’t look at these. *Rather it’s about the strength of a party’s signalling on an issue area.* Crucially, it is also about dividing lines – these are the potential wedge issues that can move votes (in this case, Labour voters) when they see parties as having differing positions on any given issue.



Findings

- All that said, the evidence here is fairly compelling: with Reform curious voters on one side and Green curious voters on the other, **the best way for Labour to balance its fragile coalition is to strike moderate positions on divisive cultural issues while leaning into progressive positions on economic issues, notably funding for public services, wealth taxation and Net Zero.**
 - Public services and wealth taxation is salient across the Labour coalition. Net Zero is a ‘free bet’ electorally that it’s highly salient with the graduate educated half of Labour’s coalition, whereas while it is less important to non-graduate, it is not unpopular.
- Given an ever-fragmented attention economy, bringing the findings in this experiment to ‘real life’ is about more than adopting these policy stances. Rather, it’s about Labour **setting clear dividing lines and generating conflict around these dividing lines** so that voters notice party’s have differing positions.



Conjoint experiment no 2

What sends Labour voters to Reform, and Reform voters to Labour?

Moving to the left of Labour on economics + combining this with migration sceptic views maximises the Reform share of the Labour vote

A complete stop to immigration is the only thing that moves large numbers of Reform voters to Labour.

02



Conjoint experiment: Labour vs Reform

- n=1000 Labour 2024 voters and 500 Reform 2024 voters, conducted via NorStat in April 2025.
- This worked the same as the previous experiment, except respondents saw two platforms - Labour and Reform - which were varied.
- In the analysis phase we see which Reform policies increase and decrease the flow of Labour voters to Reform.
- We can also look at what policies, if any, might draw Reform voters to Labour.
 - To note: about 50% of Reform voters were not responsive to any issue positioning by Labour at all, suggesting they are fervent anti-Labour or anti-system voters rather than 'frustrated issue voters'. The analysis focuses on those who were responsive or open to switching.



Example platform variation seen by respondent



46%

This survey is live. You will not be able to submit any data while logged-in.

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



Version: 27

Party	Labour	Reform UK
Immigration	Significantly reduce all immigration, introducing a hard cap of 150,000 people a year	Significantly reduce all immigration, introducing a hard cap of 150,000 people a year
Wealth taxes	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	More quickly process and deport asylum seekers without a legitimate claim, but allow legitimate cases to stay
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
Net Zero	Go slower in the UK's efforts to limit climate change, moving to renewable energy more slowly	Abolish all UK efforts to limit climate change
Workers rights	Raise the minimum wage, abolish zero hours contracts	Reduce the minimum wage, make it easier for employers to use zero hours contracts
Russia	Maintain current support for Ukraine in their fight against Putin/Russia	Decrease support for Ukraine in their fight against Putin/Russia
Select the best platform	<input type="radio"/>	<input type="radio"/>

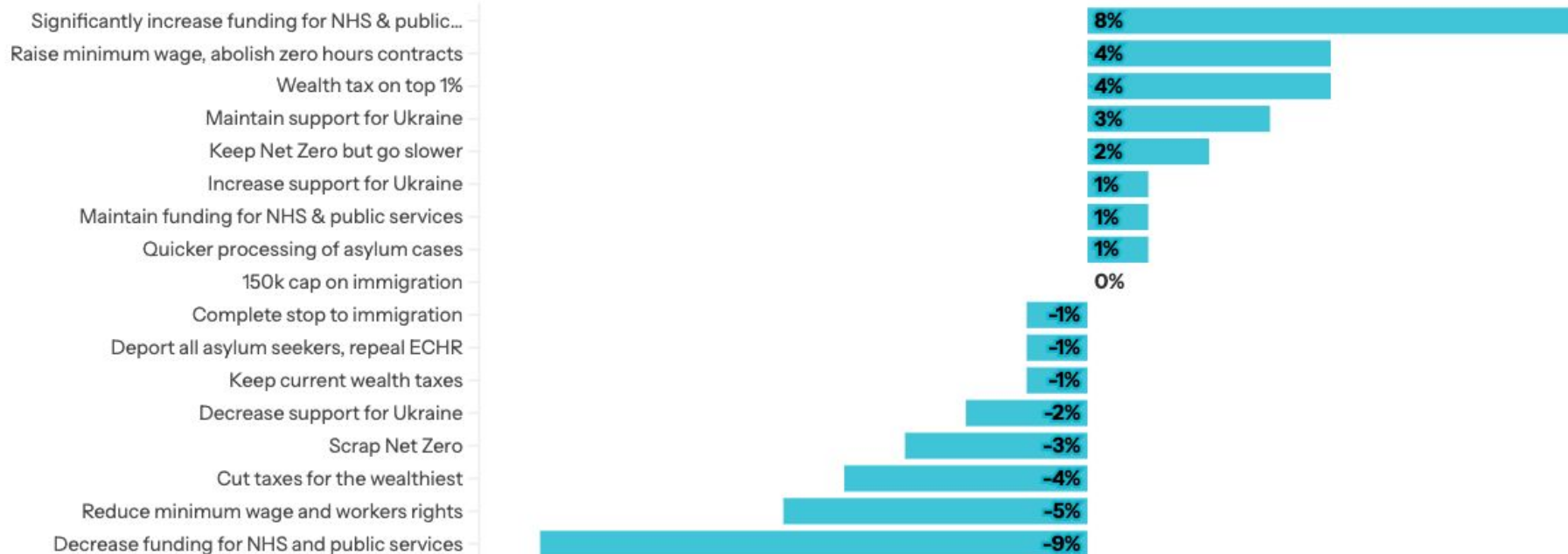


What possible **Reform** policies might win over 2024 Labour voters to Reform?

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

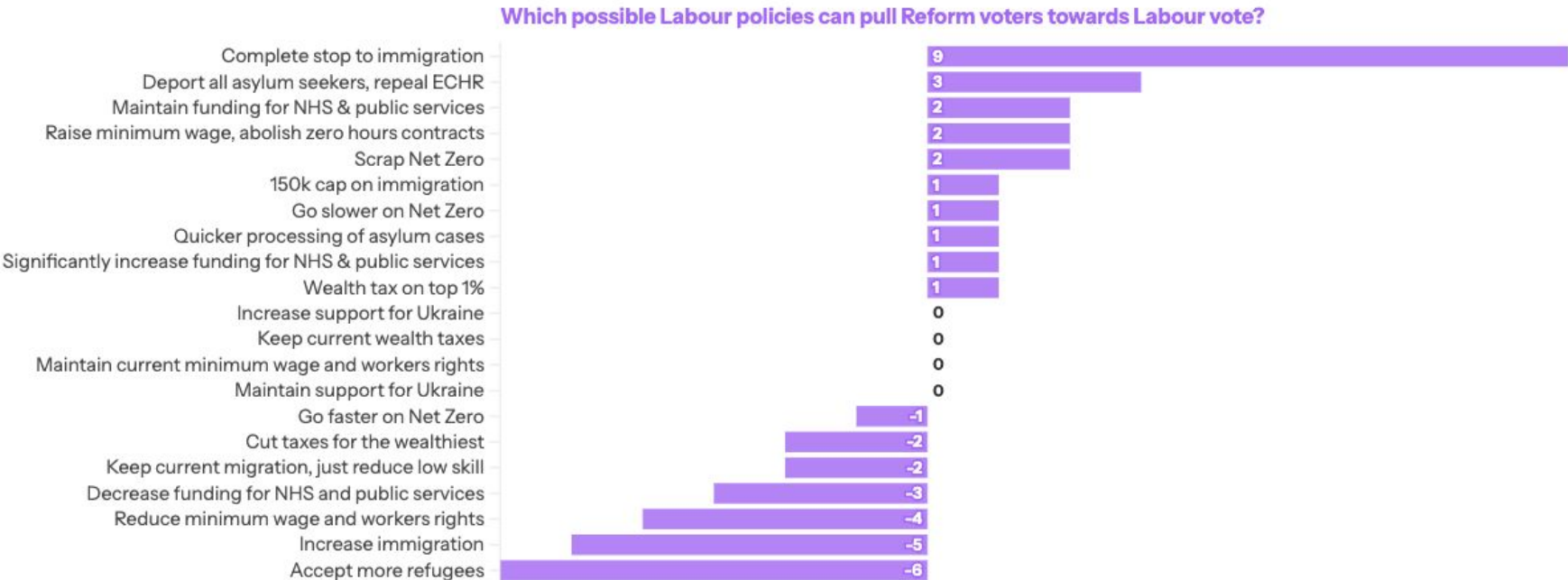
Which Reform policies would pull Labour voters towards Reform?



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





Recommendations





Recommendations for Labour to retain Reform curious Labour voters but also Lib Dem and Green switchers

- Maintain moderate – even if boring – positions on divisive cultural topics like asylum and migration. Do not get tempted to the far left or right. Be safe if unspectacular, it's unsatisfying but unavoidable.
- Through all of your strategic communications, seek to shift the site of conflict in politics away from cultural issues – which will always be disadvantageous to Labour and advantageous to Reform – and towards more populist conflict on economic left-right issues.

You must *actively seek and welcome fights* on these issues (eg funding for public services, wealth taxes, workers rights etc) to do this successfully, bearing in mind how little attention voters pay to politics.

- Provided there is no visible screw-ups on it (eg ULEZ style taxes or blackouts), clear positive signalling on Net Zero/climate is a 'free hit' – you can use dividing lines on it with Reform or the Conservatives to keep left voters inside the Labour tent, without losing Labour votes to the right.
- Seek to turn the next election into 'Labour or Farage' – persuading people of the credible threat of Reform winning will help Labour squeeze parties to its left more than a traditional Labour vs Con fight, plus add a few more Con voters to Labour's pile.
- If possible over time, leverage Reform proximity to Trump and Musk to further increase threat perception of Farage as PM / a Reform government among potential Labour voters.
- Combining this 'emotionalism' with deliverism still matters, especially on public services and small boats.



Recommendations for Reform to maximise its share of the Labour vote

- Maintain robust anti migration and anti asylum policies, seeking to keep conflict on these issues in the news at all costs.
- Beyond that, run to the left of Labour on a few key left-right issues, such as tax and spend – eg consider proposing a tax on the richest to fund the NHS or schools. Pick fights with CEOs of unpopular businesses.
- Put some distance between yourself and Trump/Musk – it is not helpful with swing voters.



Thanks!

Please do help us share this research with anyone you think would be interested

@SteveAkehurst

<https://persuasionuk.org/>