

Executive Summary

Introducing the segments

This report introduces More in Common's new segmentation of the British public. Based on extended research into Britons' core beliefs, their values and behaviours, this segmentation allows us to look upstream not just at what different groups think, but why they think it. Going beyond a simple left-right spectrum, it reflects deeper differences in how people relate to authority, change, community and the future, which help explain why traditional party loyalties have weakened and political volatility has increased. Segmentation is a particularly powerful way of detecting and understanding differences and commonality in people's values and in their broader orientation towards society and the big issues facing the country.

The analysis produces seven segments within the British population:

Progressive Activists - 12 per cent of the population

A highly engaged and globally-minded group driven by concerns about social justice. Politically active, but feeling increasingly alienated from mainstream party politics, they prioritise issues such as climate change and international affairs. Occasionally outliers on social issues, they maintain a strongly held and sometimes uncompromising approach to their beliefs.

Incrementalist Left - 21 per cent of the population

A civic-minded, community-oriented group holding views which are generally left-of-centre but with an aversion to the extreme; they prefer gradual reform over revolutionary change. They trust experts and institutions yet are largely tuned out of day-to-day politics and can be conflict-averse, stepping away from issues they see as particularly fraught or complex.

Established Liberals - 9 per cent of the population

A prosperous, confident segment who believe the system broadly works as it is and who trust experts to deliver continued progress. They have a strong belief in individual agency which can make them less empathetic to those who are struggling. Institutionally trusting, they maintain faith in democratic processes and have a strong information-centric way of engaging with issues.

Sceptical Scrollers - 10 per cent of the population

A digitally-native group whose unhappiness with the social contract means they have lost faith in traditional institutions and seek alternative sources of truth online. Often shaped by their experience of the Covid pandemic, they prefer individual influencers over mainstream media and are increasingly drawn to conspiratorial thinking.

Rooted Patriots - 20 per cent of the population

A patriotic but politically untethered group which feels abandoned and overlooked by political elites and yearns for leaders with common sense, but does not want to overthrow

the system as a whole. They are particularly concerned about community decline and the pressures of migration. Interventionist on economics but conservative on social issues, they have shaped much of Britain's politics over the past decade.

Traditional Conservatives - 8 per cent of the population

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

Dissenting Disruptors - 20 per cent of the population

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

Shattered Britain

For many Britons, recent years have been imbued with a sense of unending crises and dissatisfaction with the status quo. Many do not feel that we have an economic or social model that works for ordinary people or a politics that delivers for them. Since 2020, when More in Common last undertook a major study into Britons' social psychology, the country has endured a pandemic, the fallout from the invasion in Ukraine and conflict in the Middle East, the rising cost of living, record NHS waiting lists, record levels of net migration and four Prime Ministers. The resulting public mood of anxiety and uncertainty is not surprising, nor is the feeling shared by many that their lives, their communities and the country are shattered.

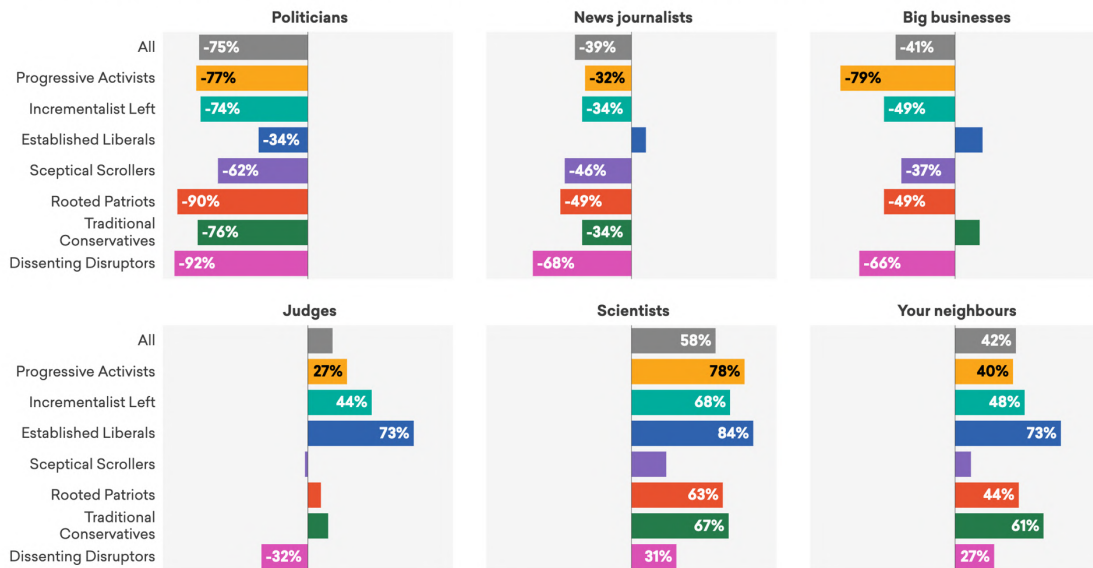
Tackling that sense of malaise requires understanding and addressing the four key drivers of Shattered Britain that emerge from More in Common's polling of 20,000 Britons and focus groups across the country. These four drivers are:

A crisis of trust: Faith in political institutions has collapsed, with 87 per cent of Britons across all parties having either not very much trust in politicians or none at all. This distrust extends beyond healthy scepticism to "deep-seated contempt" for a political class seen as self-serving and out of touch. However, distrust is not limited to politicians or political institutions, with many similarly distrustful of the judiciary, police, journalists and business. Closely tied to this crisis of trust is a lack of respect; many now believe that respect has become decoupled from contribution and that civic institutions do not respect people like them. The NHS remains the notable exception, maintaining a high level of trust, while scientists also broadly retain public confidence, unlike in some other countries.

Britons' varying levels of trust

How much trust do you have in the following?

Showing net trust (% who said they trust 'A great deal' or 'Quite a lot' minus % who said 'Not very much' or 'Not at all')



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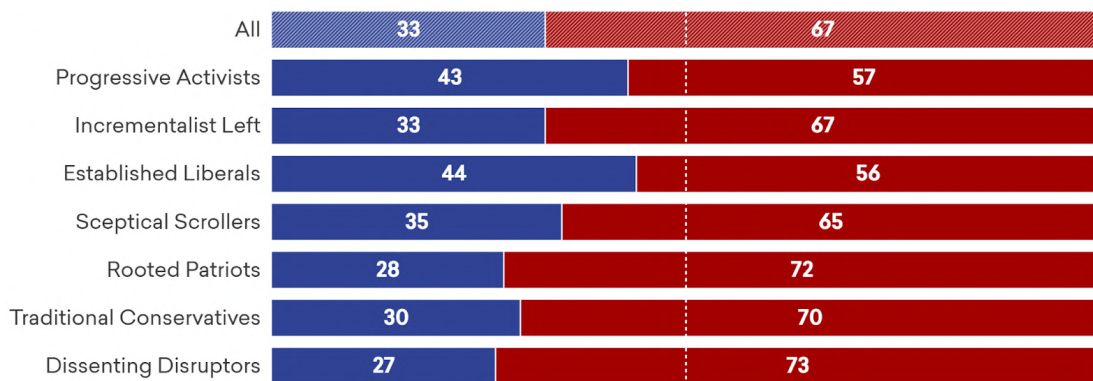
Exhaustion and struggle: Britons feel worn down by both political chaos and personal financial pressures. Despite being told since the 2008 financial crash that getting Britain back on track will require "tough choices", many have seen no improvement and seven in ten believe things are getting worse. The public feel that governments of all colours have failed to deliver change. The cost-of-living crisis has left people feeling they are "surviving not living", with 43 per cent citing money as their biggest source of stress and many cutting back on everyday social activities. Half of Britons now believe the cost of living crisis will never end.

Rising threat perception: Eight in ten Britons believe the world is becoming more dangerous, and most do not believe the government is able to keep the country safe or get the country a good deal on the world stage. Britons' concerns span escalating international conflicts, energy security, the unpredictability of the Trump Presidency, failure to control immigration, and perceptions of rising crime and lack of progress in tackling climate change. This sense of insecurity is particularly acute in areas affected by economic dislocation, contributing to support for parties such as Reform UK.

Britons' feelings of change from the previous Government

Compared to our previous Conservative government, would you say that our new Labour government...

- Feels genuinely different
- Feels like more of the same

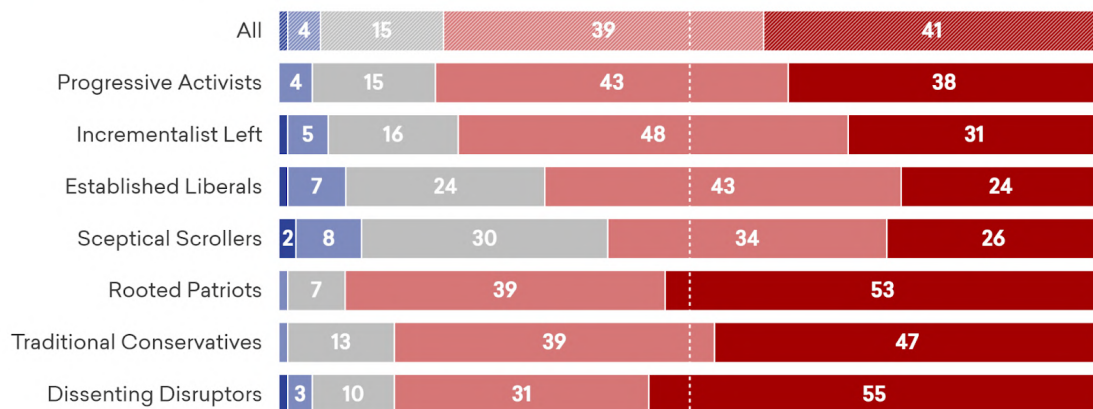


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Britons' feelings of increasing danger in the world

Would you say that the world is getting:

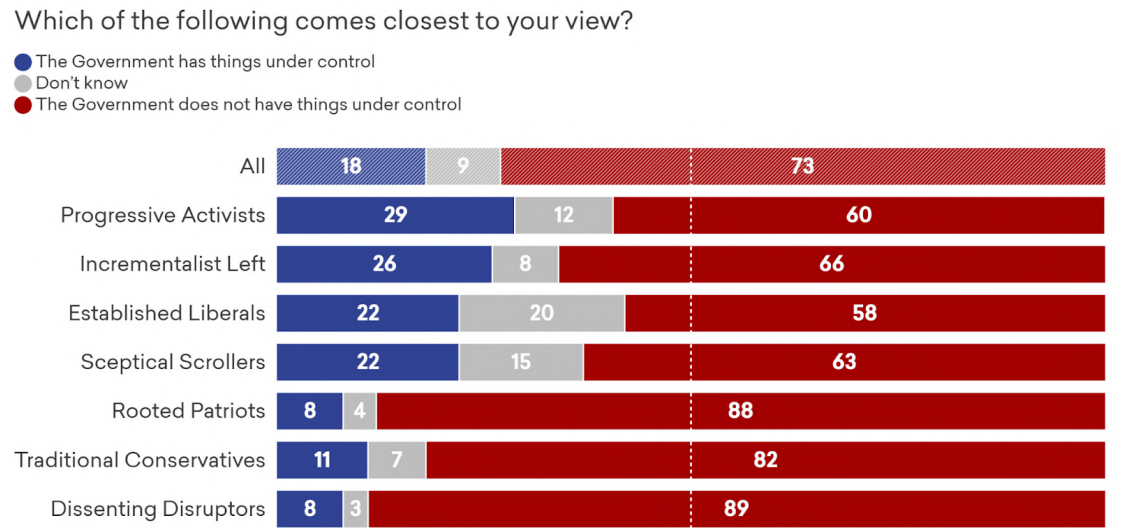
- Much safer
- A bit safer
- Neither safer nor more dangerous
- A bit more dangerous
- Much more dangerous



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Loss of agency: Among many Britons there is a feeling that they do not have control over their own lives and that they could be thrown off course by the next energy bill rise or interest rate hike. That feeling of lack of control extends to the Government - almost three in four believe it does not have things under control. Many tell us of their frustration that the Government is unable to deliver on everything from major infrastructure projects to border security, embodied by a failure to ‘stop the boats’. This powerlessness fuels the belief that Britain’s best days are behind it.

Feelings that the Government has things under control



The sense that Britain is broken, and that none of the traditional parties or institutions can fix it, is leading to more people to think that we need to roll the dice on something new. Having voted for change in a series of elections and a referendum since 2016, much of the public has begun to think the answer lies outside established norms and parties. The result is a political system more fragmented than at almost any other time in history.

Yet against this backdrop, the public themselves demonstrate a resilience in their day-to-day lives that suggests that Britain’s problems, while severe, are not unsolvable. The foundations of communities across the country remain strong and there is a desire to see the things that work well locally reflected at the national level. While many are concerned about the state of the country and anxious about the future, they believe their local communities have the answers to how to improve their area.

Nor have Britons turned entirely inward. From support for Ukraine to backing child vaccination programmes, most of the public want to see the UK do its bit to help those in need and act as a global leader to use its influence for good.

Fault lines

Traditional political binaries along left-right or party lines no longer fully explain the country's divides or areas of convergence. Understanding politics and public attitudes in the UK today requires grasping the emerging fault lines that are replacing them.

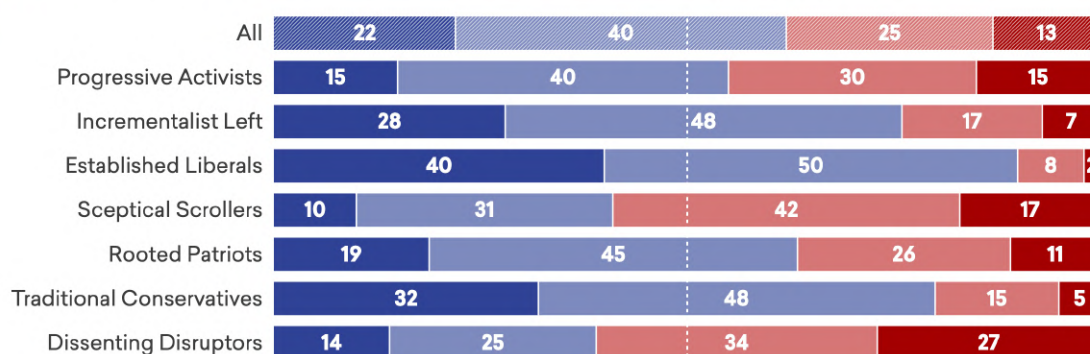
Underlying Britons' political opinions are differences in: how people approach change - incremental reform vs 'burn it all down', their tolerance for risk, perceived simplicity or complexity of Britain's solutions, their sense of social connection, belief in individual agency, susceptibility to conspiracy, and attitudes towards multiculturalism and free speech.

Appetite for change and risk: Britons divide on whether the solution to the country's problems is incremental reform or radical transformation. This is not a left-right fault line. Some segments on the traditional left and right are more in favour of 'burning down' existing institutions, while others want to protect and improve them. This desire for change sits alongside Britons' varying risk appetites - some show higher tolerance for political uncertainty, making them more willing to 'roll the dice', throwing out the old rule book and backing untested parties and solutions.

Desire for radical institutional change by segment

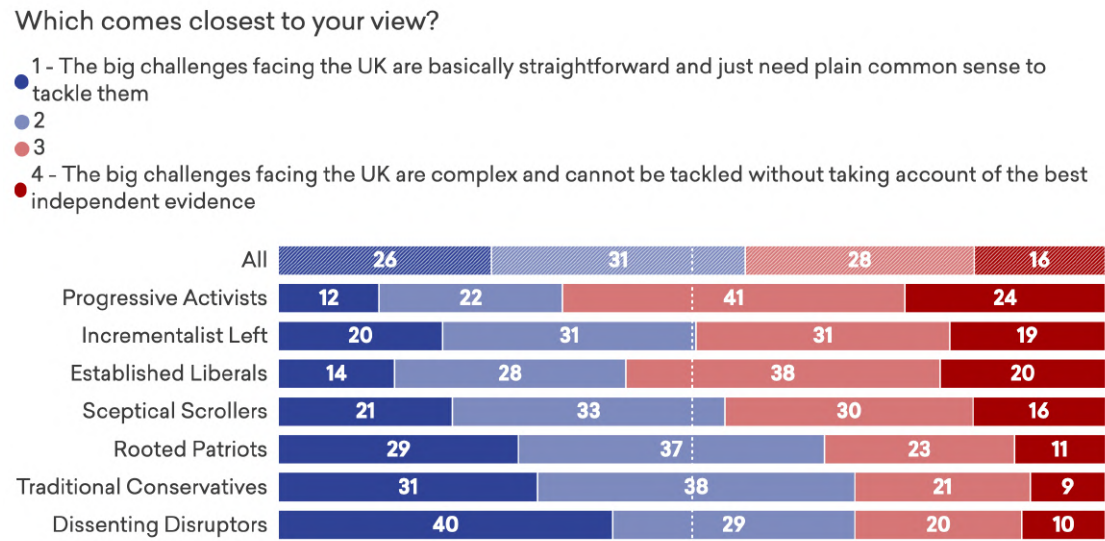
Which comes closest to your view?

- 1 - Our political and social institutions are worth preserving and improving, not destroying.
- 2
- 3
- 4 - When I think about our political and social institutions, I cannot help thinking "just let them all burn."

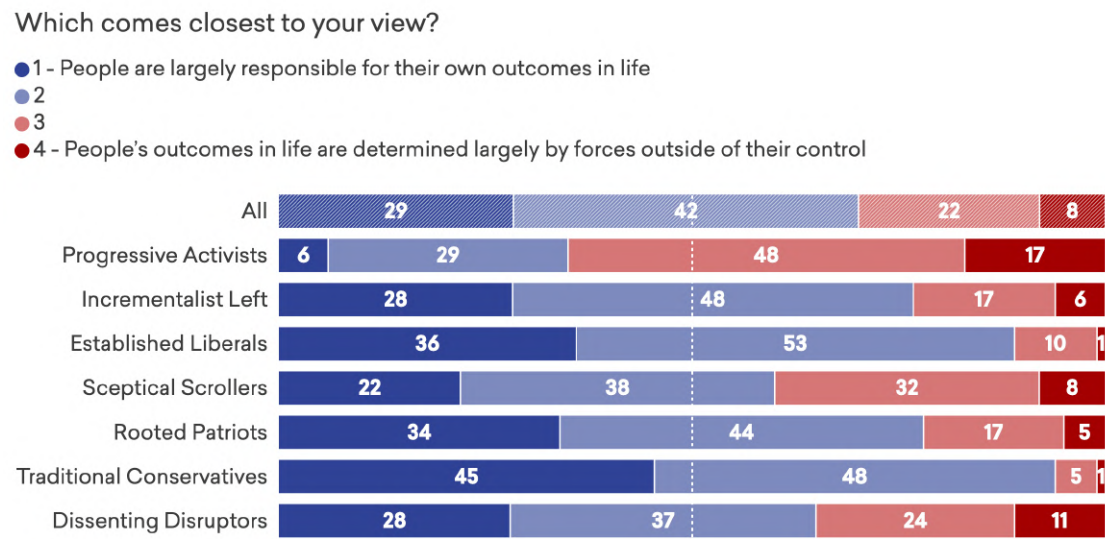


Simple or complex solutions: Britons are broadly in agreement on what the big issues facing the country are. However, while some see issues such as the cost of living and immigration as problems with simple solutions, others see them as complex challenges requiring expert input. The extent to which Britons see the country's problems as easily solvable or more entrenched affects segments' patience with the pace of change. Among segments who think there are simple solutions, there are divides between those who think those solutions would be best enacted by a more direct form of people-led democracy and those who prefer decisions to be taken by elected representatives.

Perceptions of straightforward solutions by segment



Sense of personal agency by segment



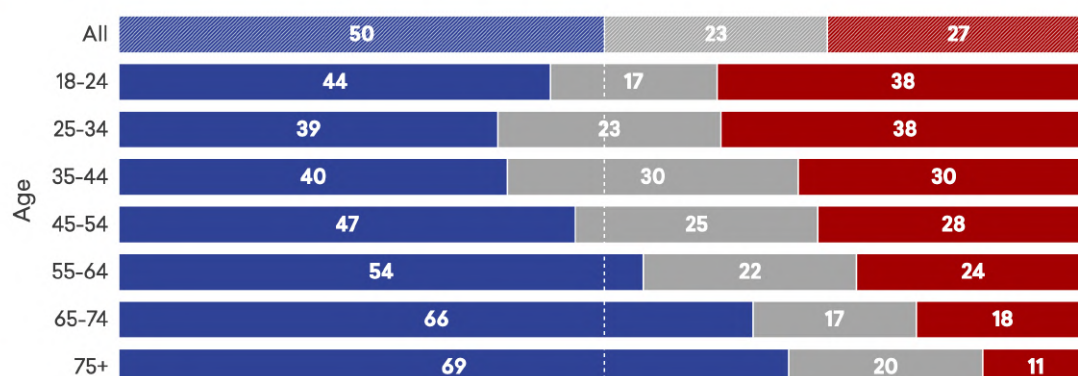
Individual agency: While Britons tend to believe that people are largely responsible for their own outcomes in life, some segments are more likely to think people's life chances are more shaped by structural factors outside of their control. One segment – Progressive Activists – stand apart from others in their overwhelming belief that those structural forces are much stronger than an individual's agency. Segments also vary in the extent to which they believe individuals genuinely have the power to change society at large through their actions, or have little influence on how society works. Groups with a higher belief in individual agency are less likely to support redistributive economic measures.

Informational trust and engagement: Trust in mainstream media varies across segments and is particularly low among younger Britons. Some segments prefer professionally produced mainstream media reports, others prefer independent journalists and firsthand accounts shared online. Different segments inhabit distinct information ecosystems. This has contributed to rising conspiracy thinking. Over one in three Britons believe the Covid pandemic was exaggerated to control people. Britons' fracturing media environments mean that we are increasingly divided according to what we believe to be true and false. Those segments that disengage from political news are more likely to vote for non-mainstream parties. Meanwhile the segments that post most on social media about politics are generally the most strident in their views.

Trust in mainstream media organisations by age

When reporting on an international conflict, what are you more likely to trust?

- The output of a large media organisation such as the BBC or The Times
- Don't know
- An independent journalist posting information directly on social media

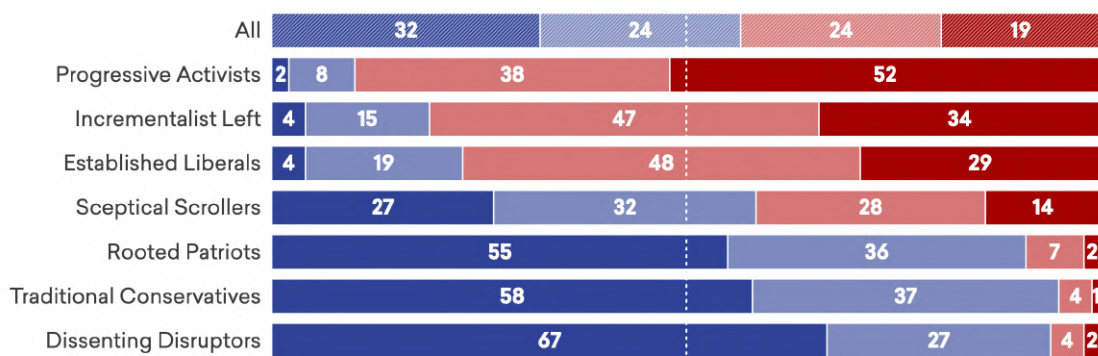


Multiculturalism and identity: Britain is split on whether ethnic diversity strengthens or weakens British identity. People in the more locally rooted, nostalgic and socially conservative segments are deeply concerned that British identity is disappearing, with the reverse true for more mobile, globally-orientated liberal segments. There are also stark differences in the extent to which segments think British identity is something of which to be proud. Economic concerns fuel zero-sum thinking about government priorities, with many feeling resources for immigrants come at the expense of British citizens. The segments divide on whether our responsibility is to those closest to us or further afield. Having lost faith in our institutions to preserve tradition, some think it is up to individuals themselves to defend British culture.

The impact of multiculturalism on British identity by segment

Which comes closer to your view?

- 4 - British identity is disappearing nowadays
- 3
- 2
- 1 - British identity is being strengthened through diversity



Free speech: Unlike American-style free speech absolutism, many Britons look for a balance between a desire to limit government interference in free speech and protecting people from hateful or dangerous speech. More socially liberal segments sit closer to the latter end of that spectrum, but so too do more social conservatives with a distaste for crass language. However others in socially conservative segments say they feel pressured to self-censor on topics like immigration, feeling that they are often "walking on eggshells" and not allowed to use language that was previously acceptable. Some segments think that political correctness helps ensure respect and inclusion in society, others attribute it to the rise of humourless "woke" culture and think that it is harmful.

Attitudes to free speech by segment

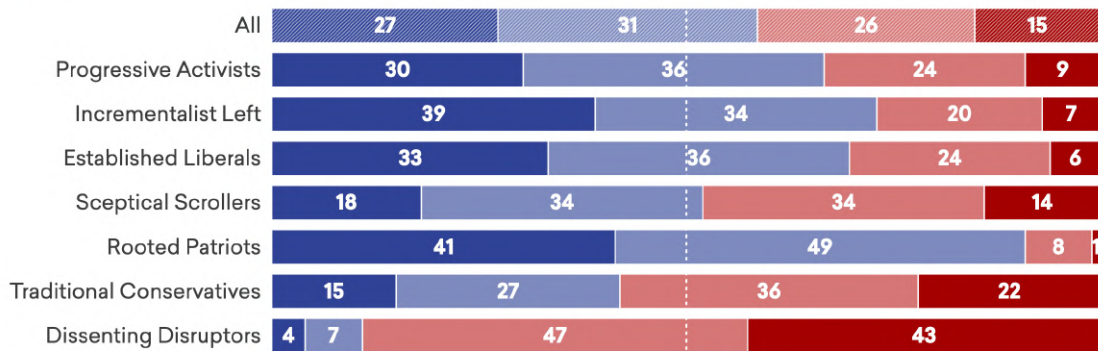
Which comes closer to your view?

● 1 - We need to protect people from dangerous and hateful speech.

● 2

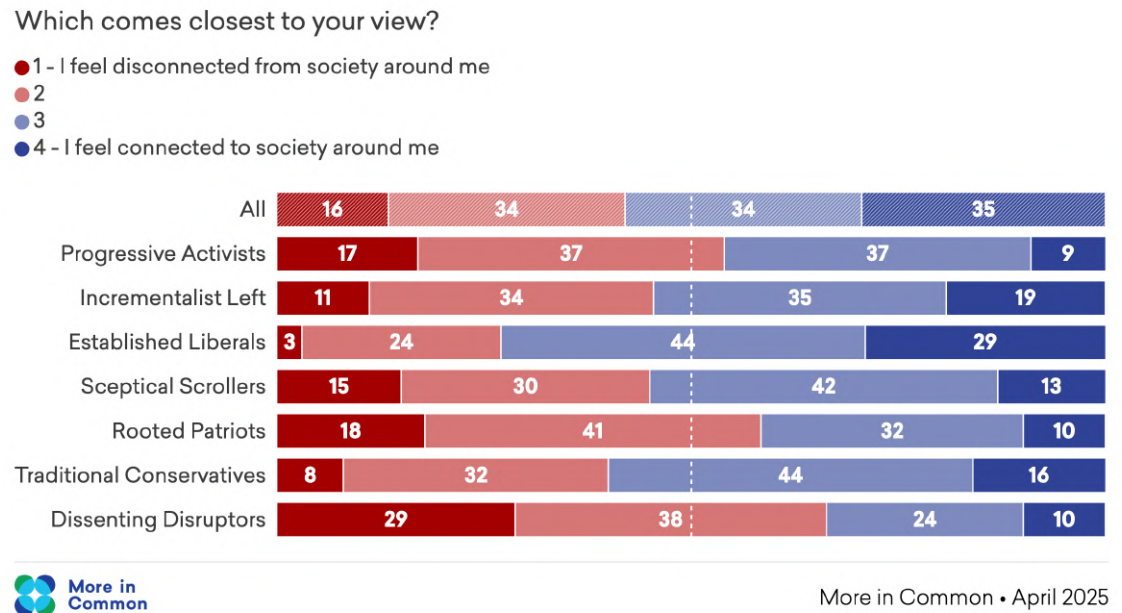
● 3

● 4 - People should have the freedom to express their views, even if they are controversial or offensive.



Social disconnection: Despite trusting their immediate neighbours, for many this does not extend far beyond their doorsteps. Many Britons feel isolated from broader society. Some segments are far more likely to believe that most people can be trusted, but in others a majority think you cannot be too careful – social (dis)connection is a key driver of social (dis)trust. The legacy of the pandemic and in particular the rise of home working has further increased divides in social connection. Financial insecurity is a key predictor of social distrust, with the divide between rich and poor seen as Britain's biggest division, followed by the divide between immigrants and those born in the UK.

Feelings of connection by segment



The importance of identity: Despite the declining salience of Brexit as an issue, whether someone was a ‘Leaver’ or ‘Remainer’ has remained as an important identity divide – two in five members of the public say this is important to them. Party identity is important to just over a third of Britons (36 per cent) and particularly supporters of Reform UK (64 per cent). Sixty seven per cent say that being British is important to their identity, Progressive Activists stand out in being less likely to say this. Gender is the dimension people are most likely to say is important to their identity.

The segments on the big issues

The ‘upstream’ attitudes and values of the different segments shape and explain how they approach the issues facing the country ‘downstream’.

The economy

All segments are concerned about the cost-of-living crisis. But while less secure groups (Dissenting Disruptors, Rooted Patriots) feel the difference in their pockets and lifestyles, more affluent segments (Established Liberals, Traditional Conservatives) remain more insulated from hardship.

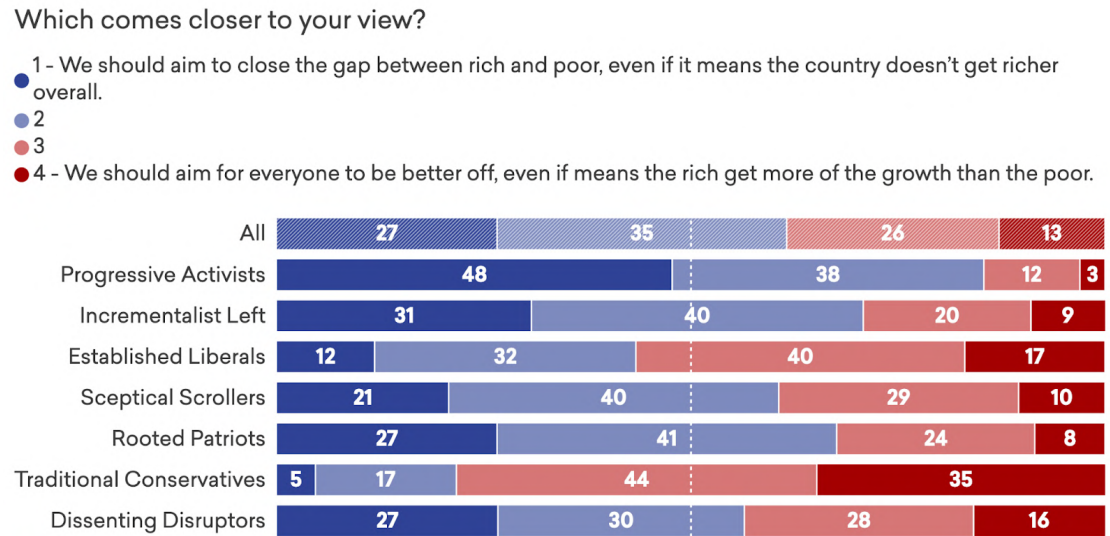
Tackling inequality is a shared economic concern across most segments. Every segment apart from Traditional Conservatives would rather narrow the gap between rich and poor even if it results in a smaller economy. The Dissenting Disruptors, Rooted Patriots and Progressive Activists are the most likely to believe that big businesses and rich people do not pay their fair share.

Majorities in almost all segments support the government introducing regulations on businesses to protect consumers from harm. Support for regulation is strongest among those who distrust business, but also a desire for firm regulation extends to more pro-business groups such as the Incrementalist Left.

Progressive Activists think the government should do more to support those on benefits. The Dissenting Disruptors and Rooted Patriots share concerns about policies affecting vulnerable people, but approach social security through the lens of contribution and worry about people ‘playing the system’. Traditional Conservatives and Established Liberals hold more welfare-sceptic views.

Across the segments, few remain wedded to an economic model which sees growth and wealth concentrated in London and the South East. A future reincarnation of the ‘levelling up’ agenda – that is ensuring opportunities, particularly for good work and jobs, are more evenly spread across the country – has strong appeal across segments.

Attitudes towards growth versus fairness by segment



Immigration

While a clear majority of the public want to see immigration reduced, there are differences in priorities between the segments. The segments broadly split into three camps on immigration.

Immigration Sceptics (Traditional Conservatives, Dissenting Disruptors, Rooted Patriots): These segments view Britain as "full" and think the country should put British people first. They want significant reductions in immigration levels, particularly illegal migration, and place greater expectations on immigrants to integrate. Dissenting Disruptors' concerns around immigration are more about preserving British cultural identity, whereas Rooted Patriots are more concerned about pressures on public services.

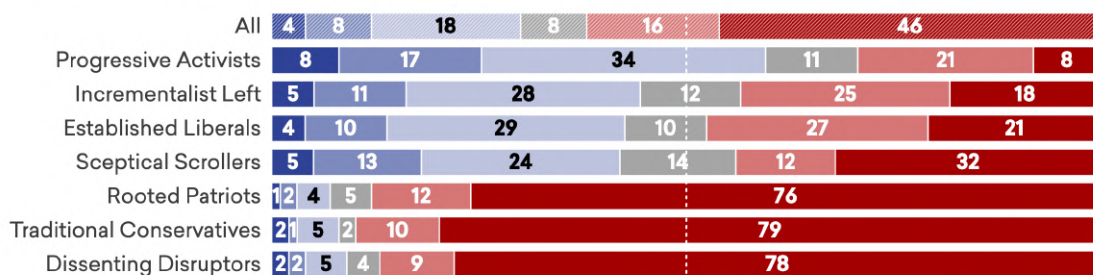
Immigration Agnostics (Incrementalist Left, Sceptical Scrollers, Established Liberals): Immigration is not the top concern for these groups but they support more controlled, selective systems that prioritise those who can contribute the most. They worry about cohesion and the pace of change. They are more split on whether net migration should decrease or be maintained as it is, but few want to see net migration increase.

Immigration Enthusiasts (Progressive Activists): Progressive Activists are the only segment where a majority want to maintain or increase immigration. They are more likely to attribute others' concerns about immigration to racism and scapegoating and think of migration in terms of its global impact and the needs of those entering the country rather than prioritising British citizens.

Attitudes to immigration numbers by segment

Thinking about the number of immigrants the UK Government accepts into the country each year, which of the following comes closer to your view?

- Government should significantly increase the numbers
- Government should slightly increase the numbers
- Government should keep the number the same
- Don't know
- Government should slightly reduce the numbers
- Government should significantly reduce the numbers



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Climate Change

While most Britons worry about climate change and tend to think the government is not doing enough on the issue, there is divergence on how to tackle it and the pace and scale of green transition.

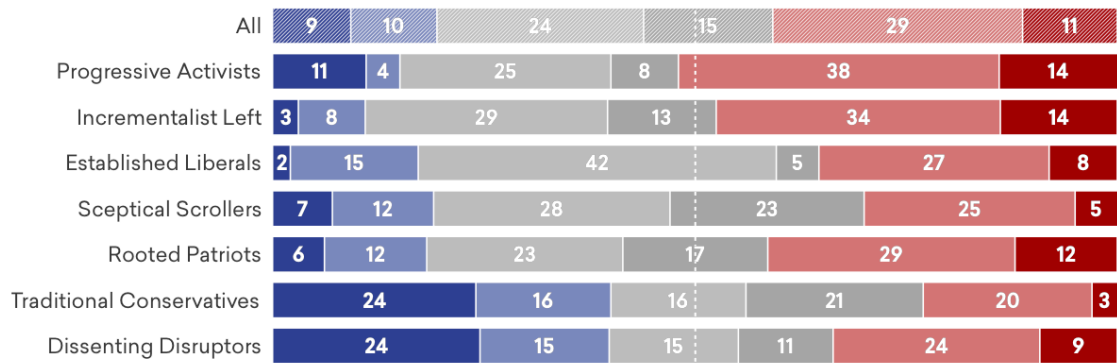
Support for net-zero varies across the segments: Progressive Activists, the Incrementalist Left, Established Liberals and Rooted Patriots support the 2050 target, while Dissenting Disruptors and Traditional Conservatives are opposed to strict timelines because of their concerns about damaging the economy.

Though most of the segments remain hopeful that stronger climate policies will be good for Britain in the long run, very few are aware of the impact of Britain's climate policies to date. Every segment, except Established Liberals, think Britain's climate policies have not made a meaningful difference to reducing emissions (despite a 50 per cent fall compared to 1990 levels) and most do not think transition so far has been fair to people like them.

Attitudes to climate change by segment

Would you say that the current government is doing too much or too little on tackling climate change, or are they doing about the right amount?

- Doing far too much
- Doing too much
- Doing about the right amount
- Don't know
- Not doing enough
- Not doing nearly enough



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Media engagement

Two in three Britons follow the news, though just one in five say they follow it very closely. The segments most tuned into current affairs are the Progressive Activists, Established Liberals and Traditional Conservatives. The segments who follow the news least are the Sceptical Scrollers and Rooted Patriots. Sceptical Scrollers see politics as someone else’s problem and do not feel they have time to keep up with it. Rooted Patriots, on the other hand, do not see the point of paying attention to politics because, in their view, politicians do not care about people like them and often are not up to the job anyway.

While the Incrementalist Left and Established Liberals have high trust in news channels which are seen to promote impartiality, such as the BBC and Sky, fewer than half of Rooted Patriots and Dissenting Disruptors trust these institutions and believe they have an establishment bias. The Dissenting Disruptors in particular trust independent sources on social media over large media organisations. GB News has become popular among both Dissenting Disruptors and Traditional Conservatives.

Politics

Britain's political map is fundamentally changing as frustration with the status quo is leading to traditional two-party loyalties collapsing into a volatile multi-party system. The segments help to shed a light on British politics in 2025 in a way that traditional analyses alone cannot.

The segment analysis provides valuable insights into the key drivers of party politics in 2025 and beyond: Labour's broad but shallow 2024 victory and subsequent drop in popularity, the crisis facing the Conservative Party, Reform's gains and the Liberal Democrat's consolidation, along with the resurgence of the SNP in Scotland and growing strength of Plaid Cymru in Wales.

Progressive Activists are Labour's liberal-left base. Their support for the party peaked in the Corbyn years. Since then, they have been disillusioned by the perception that the Labour Party has turned right-ward and abandoned Corbyn's more populist platform. They are now almost as likely to vote Green as Labour and overwhelmingly back the SNP in Scotland.

The **Incrementalist Left** voted Labour in every election since 2010, although in 2019 many abstained and their vote was divided between Labour and the Conservatives as many were put off by Jeremy Corbyn or exhausted by Brexit debates. Labour's support has weakened among the Incrementalist Left, but they are more likely than other segments to want to give Labour more time.

Established Liberals have long aligned with the socially liberal wing of the Conservative Party or the Liberal Democrats, although in 2024 they were more likely to support the Labour Party than at any point since 2010. This is the only group where Labour have maintained their support since the election. Despite Reform's surge in other right-leaning segments, fewer than one in ten (eight per cent) of Established Liberals say they would back that party were an election held today.

Sceptical Scrollers are the least likely to vote of any of the segments. They tend not to align with any party. In 2024, almost half (46 per cent) of them did not vote, although they were more likely to vote Labour than any other party. In the year since, they have been increasingly attracted to Reform UK and are now more likely to support Reform than Labour.

The **Rooted Patriots** have long been one of the most important segments in British elections. They overwhelmingly supported Boris Johnson in 2019, delivering the Conservatives their historic victory. The collapse of this group's support for the Conservatives and shift towards Labour in 2024 enabled the Labour Party's landslide. At the next General Election, the extent to which this group supports Reform UK or not will determine Nigel Farage's party's success or failure.

Britain's **Traditional Conservatives** make up the base of the Conservative Party's supporters and were the only segment to decisively back the Conservative Party in 2024. They are now narrowly more likely to support Reform UK and the Conservatives in second - with a significant proportion of Traditional Conservatives now considering Reform more authentically conservative and the main party of the right. They reliably turn out to vote.

Dissenting Disruptors have emerged as Reform UK's engaged base. Traditionally they have tended not to vote in elections, although are motivated to vote when they spot an opportunity to change the system - such as in the Brexit Referendum of 2016. In 2024 they formed the core of Reform's support and that trend has strengthened since the General Election - Reform currently has a 46-point lead with this segment.

The outcome in recent UK elections has been determined by which party is able to build the broadest coalition across the segments rather than maximising support in just one or two. Looking ahead to the 2026 elections in Scotland and Wales, forthcoming local and mayoral elections and eventually the next general election, the political parties each have different routes forward, but navigating and bridging Britain's new fault lines remain a pre-requisite to success.

