



More in
Common

Rebuilding the coalition: a Tory reset

Introducing the Seven Segments

The British Seven segments were developed to move beyond traditional left-right or party-based analysis by exploring the deeper psychological, cultural, and value-driven foundations that shape public opinion.

This approach helps explain why political loyalties have fractured and offers a more nuanced understanding of what drives attitudes on issues like immigration, climate, and the economy—enabling more effective engagement with the public across a fragmented political and social landscape.



Progressive Activists



...an outspoken group that is politically engaged and globally minded, championing social justice but feeling alienated from mainstream politics

Incrementalist Left



...a group that leans left and trusts institutions, often stepping back from the news and avoiding politically fraught debates

Established Liberals



... a prosperous group that is confident in institutions, values expertise, and believes the system broadly works

Sceptical Scrollers



...a disengaged group that has lost trust in mainstream institutions and increasingly looks online for sources of truth

Rooted Patriots



...a patriotic group that feels overlooked by elites and wants leaders with common sense to protect local identity

Traditional Conservatives



... a nostalgic group that respects tradition, authority and personal responsibility, while remaining sceptical of rapid change

Dissenting Disruptors

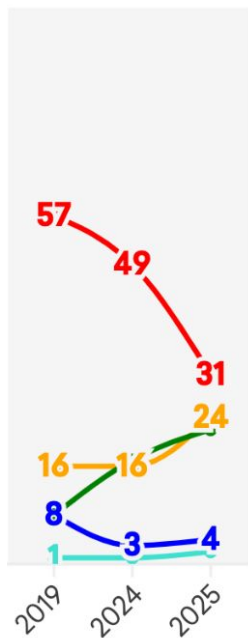


... a frustrated group that craves radical change and backs strong leaders who promise to shake up a broken system

How would the seven segments vote?

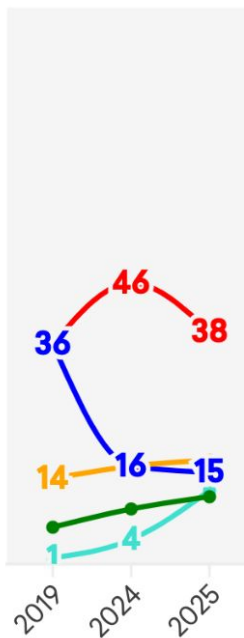
Progressive Activists

"Corbynites"



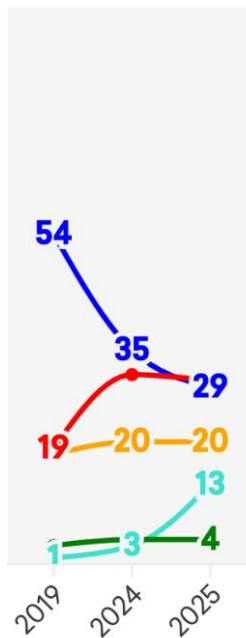
Incrementalist Left

"Social democrats"



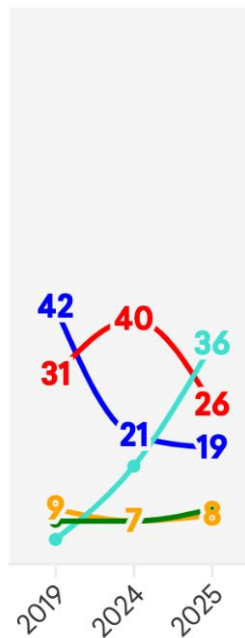
Established Liberals

"Blue Wall"



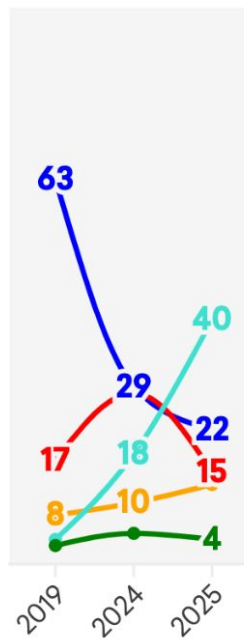
Sceptical Scrollers

"Online Disengaged"



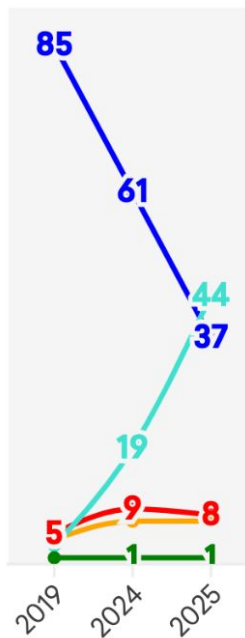
Rooted Patriots

"Red Wall"



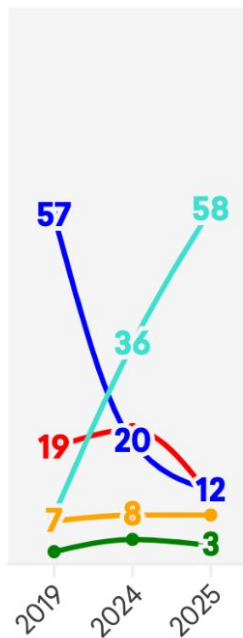
Traditional Conservatives

"Shire Tory"



Dissenting Disruptors

"Populist Right"



Key segments for the Conservatives

Established Liberals (Blue Wall)

To this group, the Conservatives should be about economic stability, championing hard work and taking **tough decisions to deal with Britain's fiscal malaise.**

They are more concerned than others about the NHS, climate change and supporting Ukraine.

An internationalist and socially liberal group - Brexit, Partygate and the party's economic record are barriers to voting Tory.

Rooted Patriots (Red Wall)

To this group, the Conservatives should stand for **common sense, national pride and community.**

Cost of living is the top issue for this segment. Their main barrier to voting Conservative is that the party is out of touch with ordinary people.

They are not convinced that the Conservatives have learned lessons since losing power and remain frustrated about the failings of levelling up.

Traditional Conservatives (Shire Tory)

To this group, the Conservatives should be about preserving **British traditions**, along with economic stability and championing hard work.

They are the most concerned about immigration and many see the party's record on immigration as a barrier to voting for them.

But Traditional Conservatives are **institutionalists** and a 'rip up the rulebook' approach from Reform does not appeal to them.

Current support has narrowed to the Conservative base

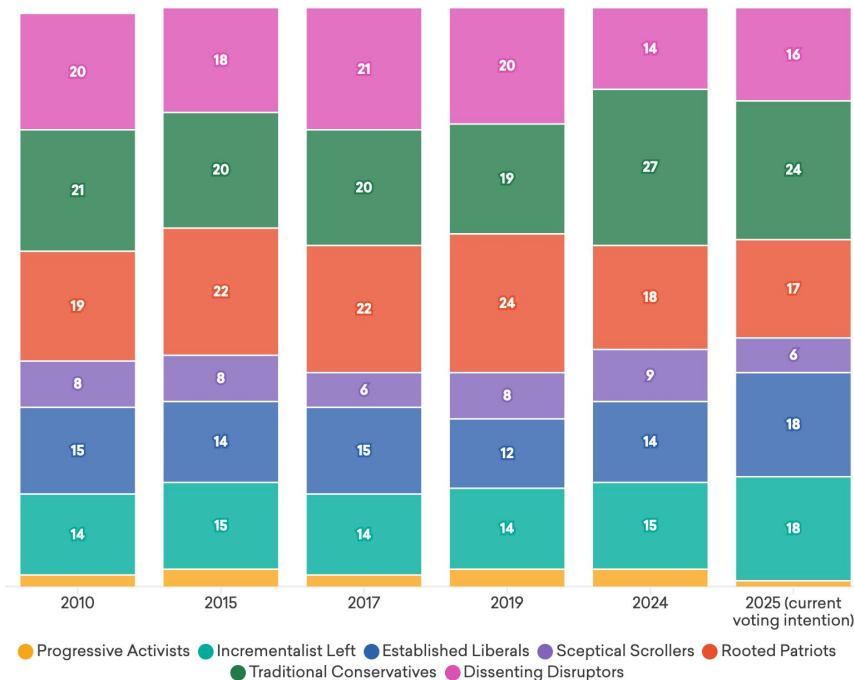
The Conservatives' electoral coalition was at its broadest in recent times in 2019, winning support even in Labour heartlands. Since then, support for the Conservatives has fallen most sharply in segments where it had previously been strongest.

In 2019, the party made gains beyond their Traditional Conservative base and won among 'Red Wall' Rooted Patriots. While Brexit was a binding agent for this coalition, they also retained their support among Cameronite Established Liberals.

In the 2024 General Election, the party's support narrowed, to the extent that they only won decisively among their base of Traditional Conservatives.

Since the election, their support base has narrowed further, and even this group cannot be taken for granted: Reform UK now leads among Traditional Conservatives.

Conservative voters by segment since 2025



What has happened to Conservative support?

Reform UK poses an almost existential-level threat to the Conservatives. 2019 Tories are now more likely to vote Reform than Conservative.

In the 2024 General Election, around 17 per cent of 2019 Tory voters supported Reform UK.

Since the election, the Conservatives have lost around a quarter (24 per cent) of their remaining voters to Reform.

Now, 39 per cent of those who voted Tory in 2019 would now vote for Reform, while 33 per cent would vote Conservative.

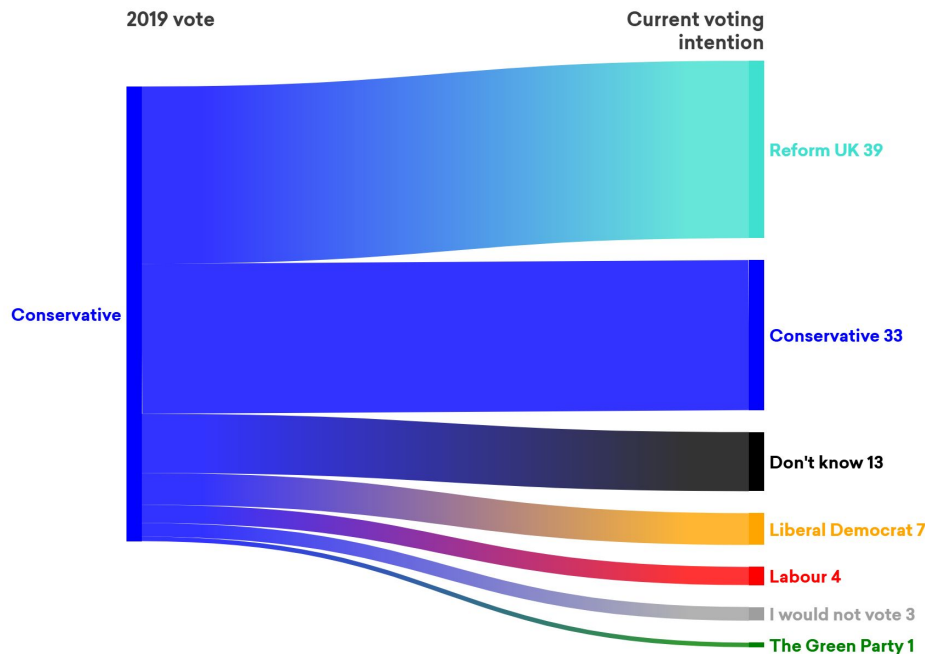
"I think the last three or four I voted for Conservative. Obviously Labour's in now, I don't like what they're doing. I would actually vote Reform."

Donna, Retired, Hertfordshire

How would 2019 Conservative voters vote now?

If a general election was called tomorrow, which party would you vote for?

2019 Conservative voters



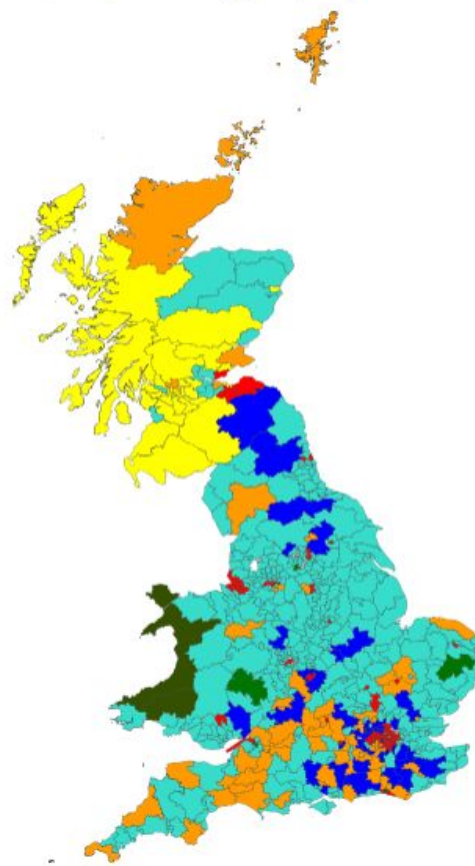
Current polling suggests a Conservative wipeout

More in Common's new MRP projects a **Reform UK majority if a general election were held today**. The result would see the Conservatives reduced to **41 MPs**.

In 134 of the seats won by the Conservatives in 2019, including parts of the Red Wall and Scotland, the Tories are now in third place or lower.

Party	Seat count
Labour	90
Reform	373
Conservative	41
Lib Dem	69
SNP	34
Other	14
Green	6
PC	4

Winner: Reform UK Liberal Democrat Scottish National Party (SNP) Labour
Other The Green Party Plaid Cymru Conservative



What's stopping Britons from voting Conservative?

Rebuilding trust in the Conservative Party will require it to reckon with the legacy of its time in government, and address Britons' perception of the party as out of touch.

The top reason Britons give to *not* vote Conservative is a sense that the party does not understand ordinary people - selected by 25 per cent of the British public. Tory switchers cite migration above all else: the top reason given by former Conservative voters as to why they no longer support the party is its "record on immigration".

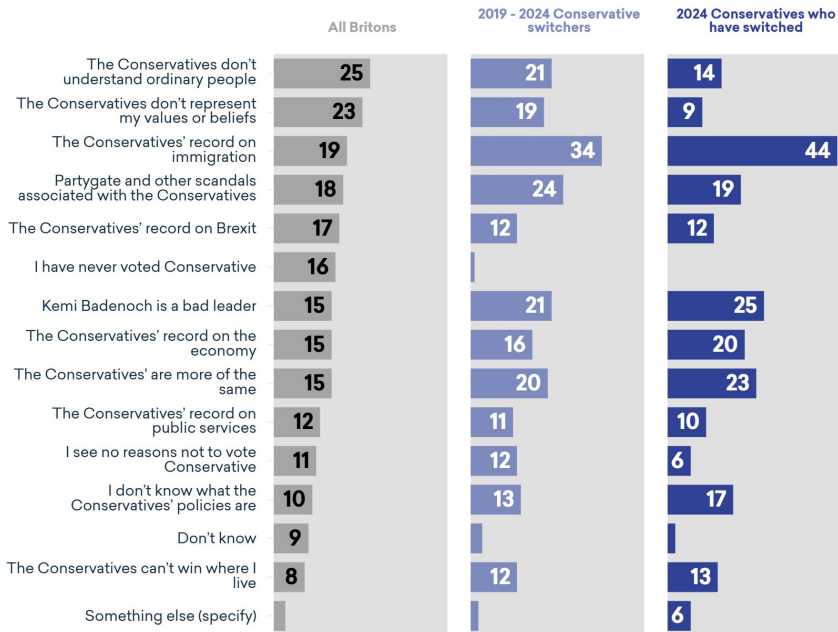
Partygate is also still salient for Tory switchers, the second top reason given by those who abandoned the party between 2019 and 2024.

"The result of this Partygate thing has really just shaken me, when people literally couldn't visit their dying relatives and they were having a jolly in Downing Street. It's really, really changed how I feel."

Jill, Small business owner, Hitchen

Voters are deterred by a sense that the Conservatives are out of touch, and failed to handle immigration

Which of the following would you say are the main reasons stopping you from voting for the Conservative Party? Select up to three.



What's the point of the Conservative Party?

Britons believe the Conservatives, at their best, are a party that **creates economic stability, looks after the middle class, maintains British tradition and stands for hard work and success.**

Asked what the Conservatives look like at their best, the public gives 'creating economic stability' as the top answer.

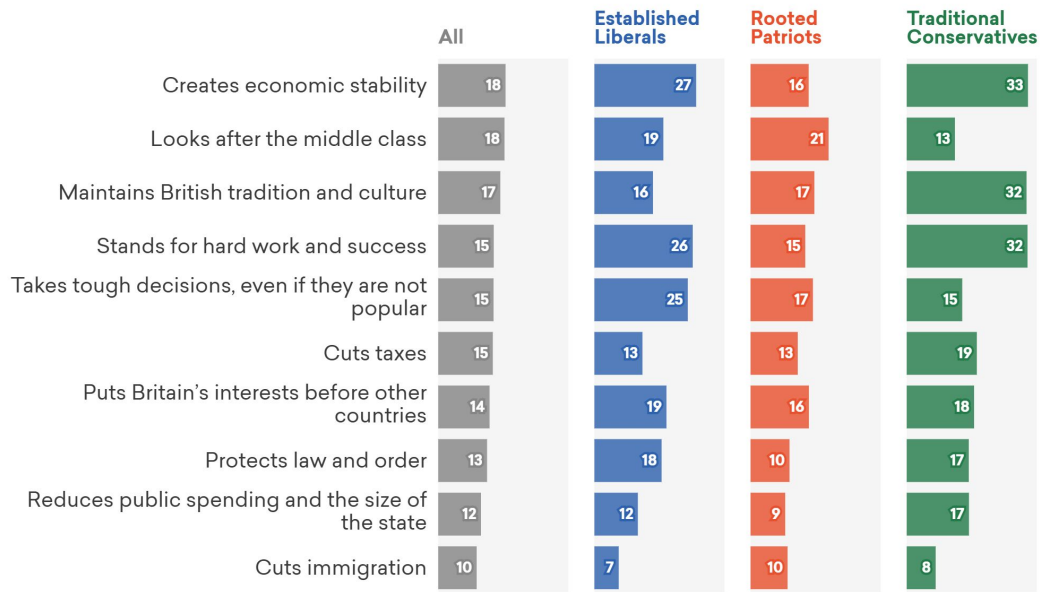
For Established Liberals and Traditional Conservatives, **standing for hard work and success** is also central.

Established Liberals also value the party for **taking tough decisions.**

What do the Conservatives look like at their best?

Setting aside how you intend to vote at this election, when the Conservative Party is at its best, what does it represent? A party that... (Select up to three)

(Top ten only)



The incumbency effect transferred to Labour

Despite Labour campaigning on a platform of change, the desire for change among the electorate has only grown since Labour took power.

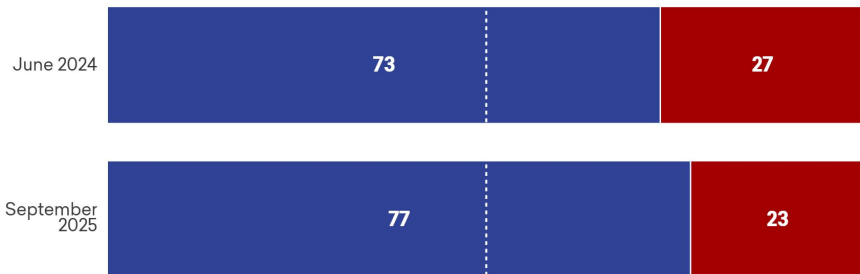
Reform is seen as a 'none of the above' choice - a roll of the dice that something radically new can fix Britain - but the sense of risk also acts as a deterrent to its potential voters.

Labour benefitted in the 2024 General Election from people voting against the Conservatives and in favour of competency and stability. In the same way, the Conservatives could now be in a position to collect voters who want anything but the status quo, by offering competence and stability rather than insurgency.

Britons still think it's time for change

2024 question: "Which of the following comes closest to how you are feeling about the next General Election?" **2025 question:** "Thinking about how the country is being run at the moment, which of the following comes closest to your view?"

- It's time for change
- We need to stick with the plan



More in Common • June 2024, September 2025

"I mean in the past, yes, I've done Conservative and then Labour, but I'm steering away from both of those now and I think possibly next time it'll be Lib Dem, but I'm just not sure because they say all these things and until you actually get to that point, I'm not sure." Sarah, Sheltered housing manager, North East Hertfordshire

Fewer people would rule out voting for the Conservatives

Anger towards the Conservatives may have peaked around the 2024 General Election and since dissipated.

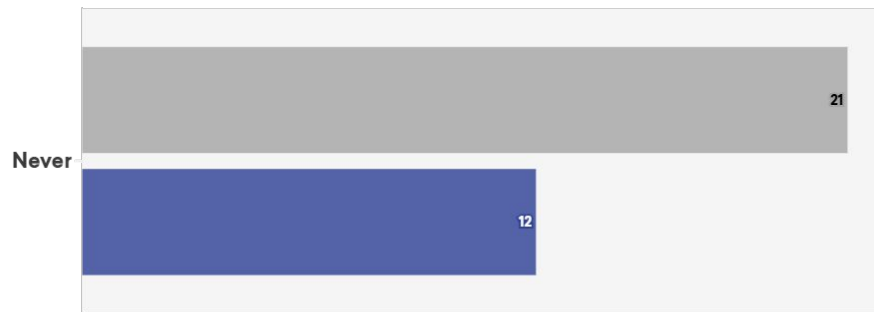
Most 2019 Conservatives would consider voting Conservative again within a decade.

The proportion who say they would never vote Conservative again has nearly halved since this time last year. The challenge now is to get a hearing from these voters by promising something new and distinctive.

Fewer Tory defectors would rule out never voting for them again than last year

You said you voted for the Conservatives before, but did not do so at this election. How long do you think it will be, if ever, before you vote for the Conservatives again?

● September 2024 ● September 2025



Source: More in Common • September 2025

"It would be refreshing for somebody to come in in the Conservatives and be dynamic and deliver what they actually say and I think that would actually turn the country around."
Adrian, Semi-retired, North East Hertfordshire

But few think they have changed

While some of the anger is fading, few think that the Conservatives have fundamentally changed since the election, or learned their lessons from government.

At the time of last year's Conservative Party Conference, More in Common asked Britons whether the party needed to change in order to win the next election: four in five Britons (82 per cent) said they needed to change - and this was even higher (90 per cent) among those who voted Conservative in the election.

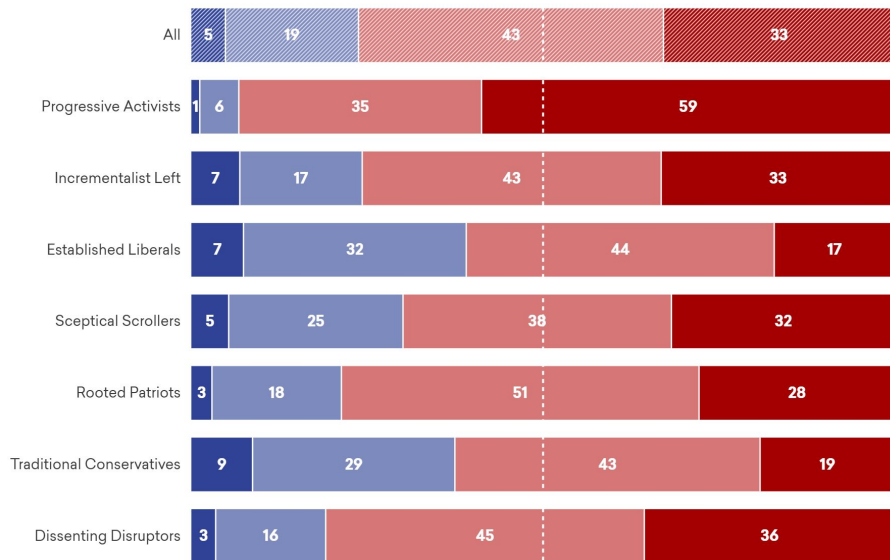
Yet fewer than 3 in 10 say that the Tories have changed since the General Election, and only a quarter (24 per cent) say that they've learned lessons from their 14 years in power.

Among those who abandoned the party in the 2024 General Election, only 30 per cent believe the Conservatives have learned their lesson.

Three quarters of Britons are not confident that the Conservatives have learnt their lesson

How confident are you that the Conservative Party has reflected on and learned lessons from their 14 years in power?

● Very confident ● Quite confident ● Not particularly confident ● Not confident at all



Many on the right would return

While the public has yet to see the change it wanted, there is a willingness to return to the Conservatives, particularly among more institutionalist segments.

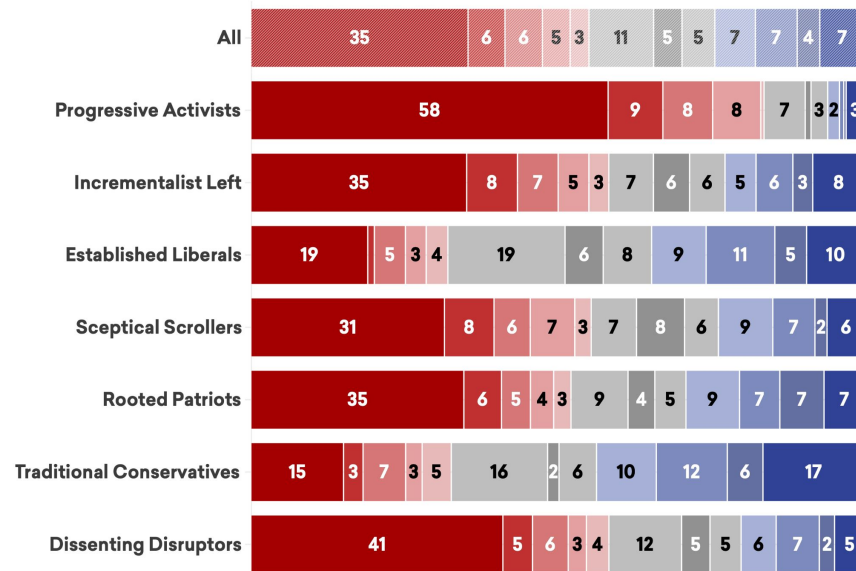
Among 2019 Conservatives who would now vote for Reform, 33 per cent would consider voting Conservative again, as would 37 per cent of those who've switched to parties on the left, such as Labour or the Liberal Democrats. In both groups, about a quarter say they definitely would not.

Traditional Conservatives, Established Liberals and Rooted Patriots are more open to the party than Dissenting Disruptors.

Established Liberals and Traditional Conservatives are less likely to rule out voting Conservative again than Dissenting Disruptors

While there is a way to go until the next General Election, please use the following scale to indicate how likely you are to vote for the Conservatives, where zero means you would never vote for that party, and 10 means you would definitely vote for that party.

● 0 - I definitely will not vote for this party ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10 - I will definitely vote for this party



The battle for the right is not over

There is fertile ground for a party on the right to offer a credible alternative to Labour, but the Conservatives cannot afford to stand still - as Reform looks set to fill this gap.

Only among Dissenting Disruptors do more believe that it would be a good thing if Reform UK replaced the Conservatives as the main party on the right of British politics.

The key challenge for the Conservatives over the next four years will be proving that they are a viable alternative.

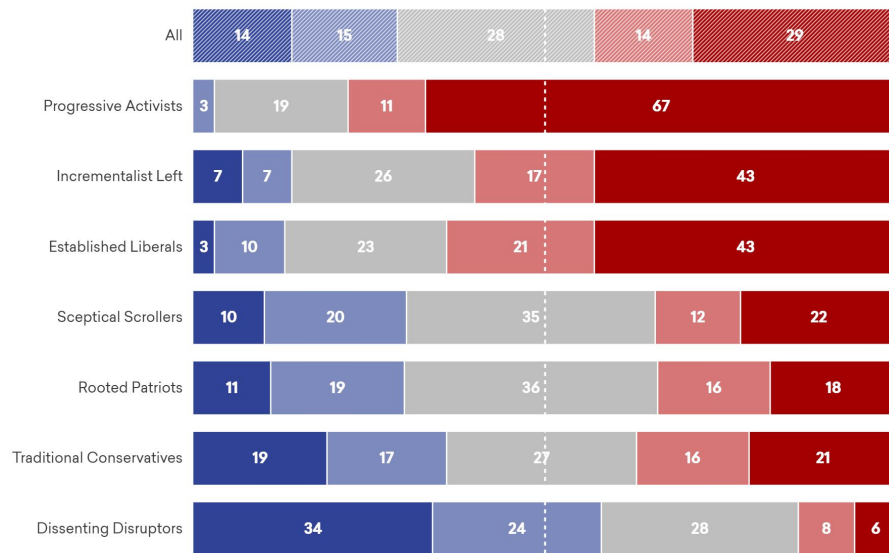
"But each party is going to say the same thing. That's why I'm so undecided now...You can't trust any of them."

Sara, Support worker

Only Dissenting Disruptors would like to see Reform replace the Conservatives

How would you feel if Reform UK replaced the Conservative Party as the main party on the right of politics in the UK?

● Very good ● Quite good ● Neither good nor bad ● Quite bad ● Very bad



The Party isn't over yet

Most Britons think that the Conservatives' position is recoverable.

Only among Dissenting Disruptors (Reform UK's base segment) do a majority believe that the Conservative Party's position is irrecoverable.

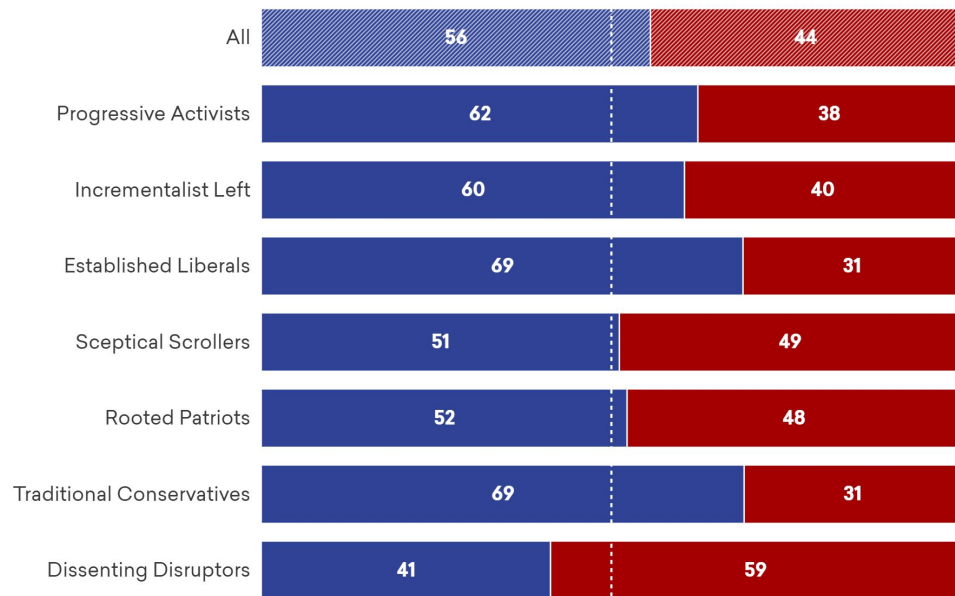
Seven in ten (69 per cent) Established Liberals and Traditional Conservatives think that the Conservative Party's position is recoverable.

*[when asked about the Conservatives in a word]
"Transition... five years ago it was said that the Labour Party wouldn't get in. So five years is a long time (...) If the Labour Party are doing really bad, it won't take much to get back in again." David, Plymouth*

Most Britons think the Conservatives' position is recoverable

Which comes closest to your view?

- The Conservative Party's position is not irrecoverable
- The Conservative Party's position is irrecoverable





The viability test:

What Britons want to see from the Conservatives



1. Clear leadership

Britons are unclear about what Kemi Badenoch stands for

A key challenge facing the Conservatives is lack of awareness of the leader and what she stands for.

Three in five Britons (and 56 per cent of former Conservatives who voted for another party in 2024) say it is unclear what Kemi Badenoch stands for.

In contrast, only 29 per cent say it's unclear what Farage stands for. This suggests part of Reform's effectiveness comes from communicating its leader's profile and positions more clearly than the Conservatives have.

"I didn't know that she was with Conservative Party. I've seen her face, not often, but I've seen her, but I didn't realise that she was the lead of the Conservative Party."

Donna, Retired, North East Herefordshire

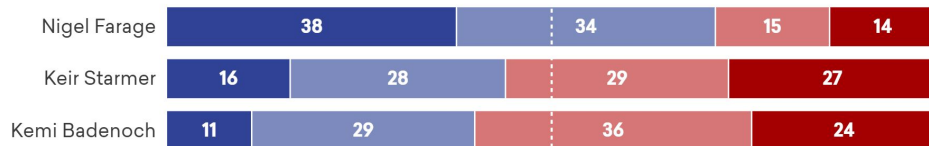
How would you describe Kemi Badenoch, leader of the Conservative Party, in a word?



Three in five Britons say it's unclear what Badenoch stands for

How clear are you about what each of the following politicians stand for?

● Very clear ● Somewhat clear ● Somewhat unclear ● Very unclear



Could Boris Johnson reinvigorate the Conservatives?

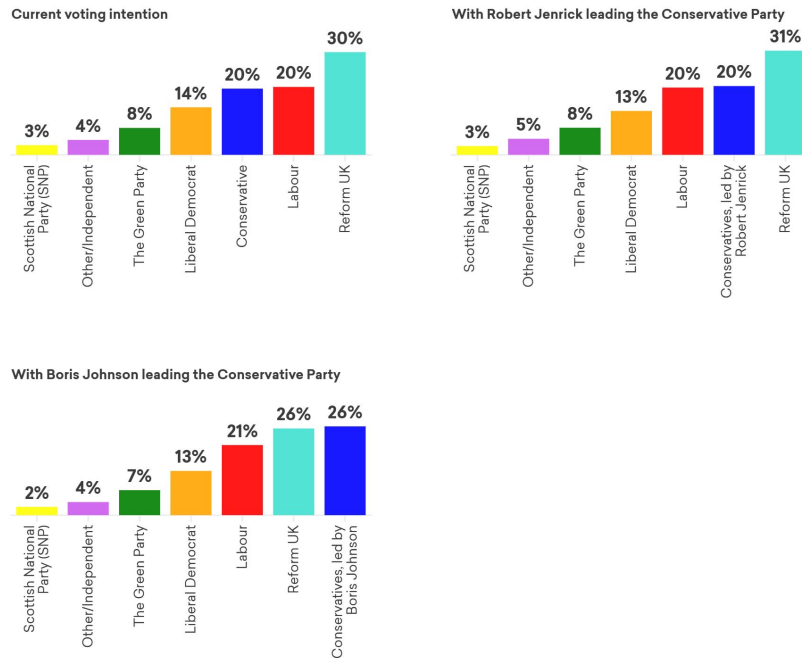
In a hypothetical voting question where Boris Johnson is leads the Conservatives instead of Kemi Badenoch, the Conservatives pull even with Reform UK.

This is not simply about changing leader: replacing Badenoch with Robert Jenrick makes little difference to voting intention.

The relative performance of Johnson compared to both Badenoch and Jenrick highlights the value of a leader with high name recognition - and the importance for Badenoch of making clear what she stands for.

A Conservative Party led by Boris Johnson could tie with Reform UK

Current voting intention, compared to hypothetical polling with Boris Johnson and Robert Jenrick as leaders of the Conservative Party



A 'bring back Boris' strategy

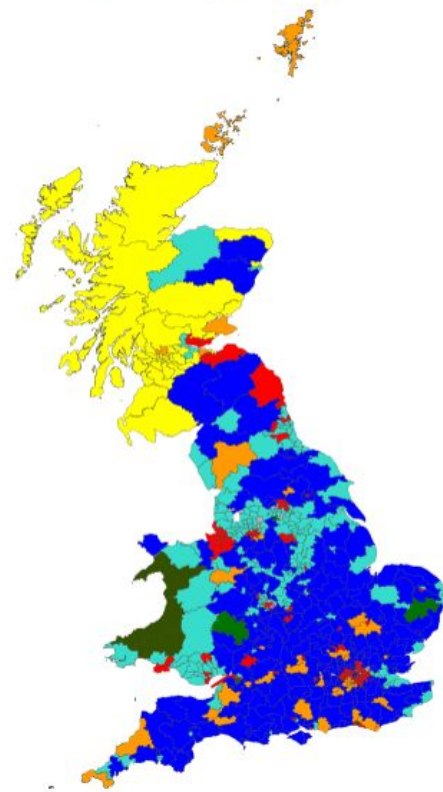
Replacing Kemi with Boris in a hypothetical voting scenario pulls in nearly one in five Reform voters along with one in ten Liberal Democrats and some from other parties.

Scenario: 18 per cent of Reform voters and 11 per cent of Liberal Democrats switch to Conservatives.

Result:

Party	Seat count	Change vs MRP
Labour	121	+31
Reform	179	-194
Conservative	224	+183
Lib Dem	41	-28
SNP	39	+5
Other	17	+3
Green	7	+1
PC	3	-1

Winner: Reform UK Liberal Democrat Scottish National Party (SNP) Labour
Other The Green Party Plaid Cymru Conservative



Attacks of the 'Boriswave' struggle to gain traction

Most voters are unfamiliar with the phrase 'Boriswave' - just 23 per cent are, though this rises to 30 per cent among Conservative-Reform switchers.

A similar number of voters are aware what the phrase means, though this is only marginally higher among the most migration-sceptic segments - Traditional Conservatives and Rooted Patriots - than among the rest of the population.

This suggests that this specific frame of attack from Labour and Reform has not yet cut through to a majority of voters, despite many being unhappy with the Conservatives' record on migration and asylum.

Around a third of people correctly identify 'Boriswave' as referring to a surge in net migration during the Johnson premiership

What do you think the word "Boriswave" refers to?



But voters are not ready to write off Badenoch

While a hypothetical Boris Johnson leadership polls well, it's clear that the problem is not Kemi Badenoch herself, but rather a desire for a recognisable figure to lead the party.

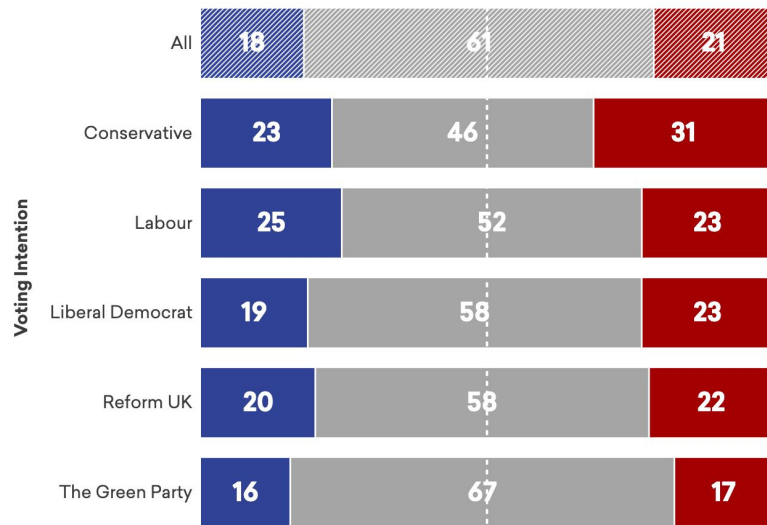
Among current Conservative supporters, 31 per cent say their opinion of the party would improve if Badenoch were to be replaced, 8 percentage points higher than the number who say her being replaced would make them think less of the party.

However the majority of Britons (61 per cent) say their feelings of the party would remain unchanged.

This could be explained by the lack of an appropriate alternative and the general feeling that all politicians are the same.

In your view, would replacing Kemi Badenoch as Conservative party leader...

- Make you think less of the Conservatives as it would show they're still chaotic and disunited
- Make no difference to how I feel about the Conservative Party
- Make you think more of the Conservative Party as someone else could do a better job





**2. It's the economy,
stupid**

Harnessing trust on the economy

Despite a loss of trust following Liz Truss' mini-budget, the economy remains an issue that stands the Conservative Party apart.

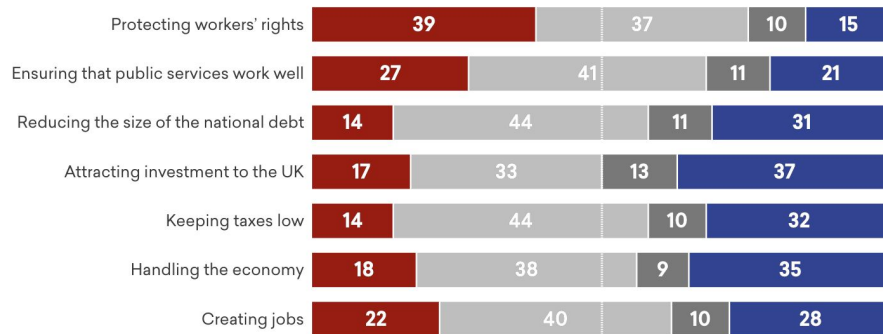
Britons are twice as likely to trust the Conservatives over Labour and Reform when it comes to handling the economy, reducing national debt and attracting investment to the UK.

If the Conservatives can rebuild their image as a party of fiscal responsibility, it would help to restore trust in the party as voters have strong doubts about the viability of Reform's spending plans.

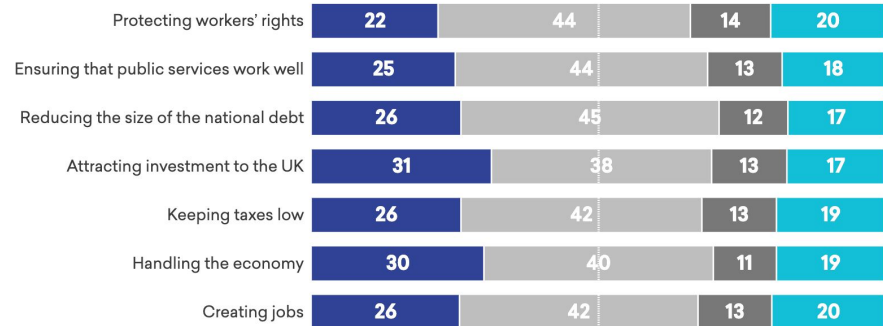
However, attacks on the economic credibility of Reform and Labour would only be effective if the Conservative Party had a clear, credible economic plan.

Which party do you trust more on each of the following?

● Labour ● Neither ● Don't know ● Conservatives



● Conservatives ● Neither ● Don't know ● Reform



Tax as a wedge issue

Labour has not shaken off its reputation for increasing taxes: two in three associate the Labour party more with high than low taxes.

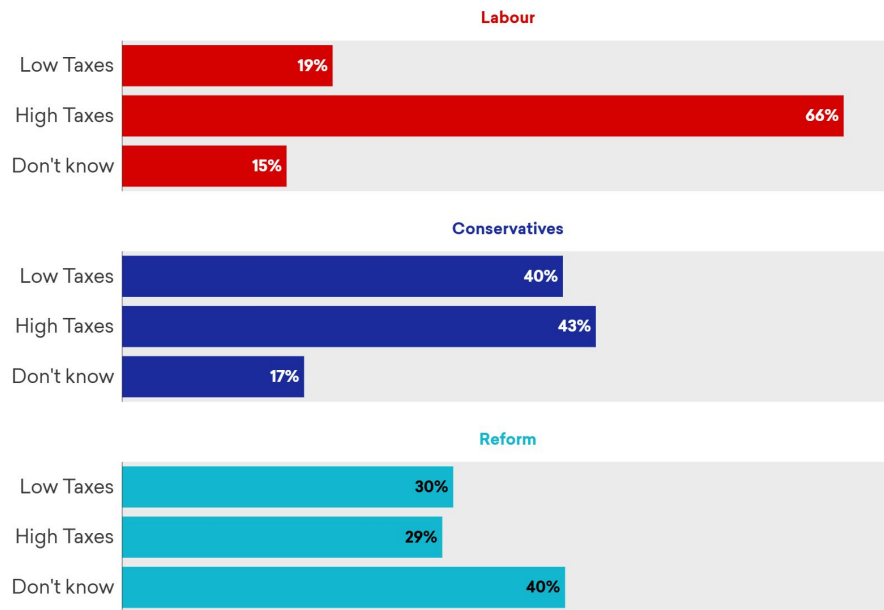
Yet taxation under the previous Conservative government may have cut through. Britons are split roughly evenly on whether Conservatives represent high or low taxation, with 40 per cent saying they represent low taxes and 43 per cent saying they represent high taxes.

In a head-to-head on keeping taxes low, the public is far more likely to trust the Conservatives over Labour (32 per cent vs 14 per cent) and slightly more likely to trust the Conservatives than Reform (26 per cent vs 19 per cent).

If the Conservatives can position themselves as a party of low tax, this could be a wedge issue with Labour.

The Conservatives are more likely to be associated with low tax than Labour or Reform

Would you associate the following parties with...



Tax unites the 2019 Tory base; redistribution and regulation don't

Conservative voters are now mostly in the camp of wanting to see lower taxes even if it means lower spending on public services.

This includes voters the Tories have lost to Labour and Reform, and Conservative loyalists.

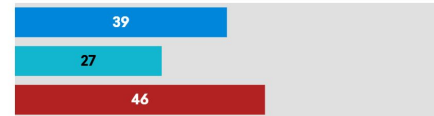
However, they are more split on regulation of business and on whether it is better to place emphasis on growth, even if it increases inequality.

The Conservative voter coalition are united in support for low taxes, but diverges on regulation and redistribution

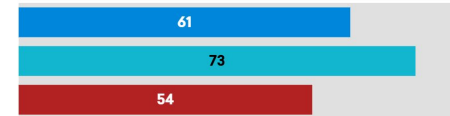
Support for different policy positions

- Conservative-Loyalists (Voted Conservative in 2024, currently intend to vote Conservative)
- Conservative-Reform Switchers (voted Conservative in 2024, currently intend to vote Reform)
- Conservative-Labour Switchers (Voted Conservative in 2019, voted Labour in 2024)

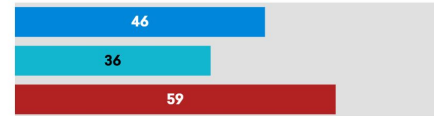
Higher taxes but higher investment in public services



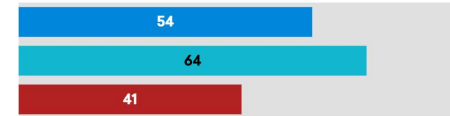
Lower taxes but less spent on public services



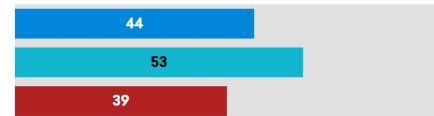
Regulate business to protect consumers



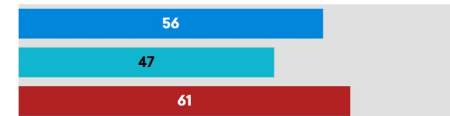
Government should minimise regulations



Greater wealth overall, even if greater inequality



Gaps between rich and poor smaller, even if less wealth overall



The public might listen to a tough message

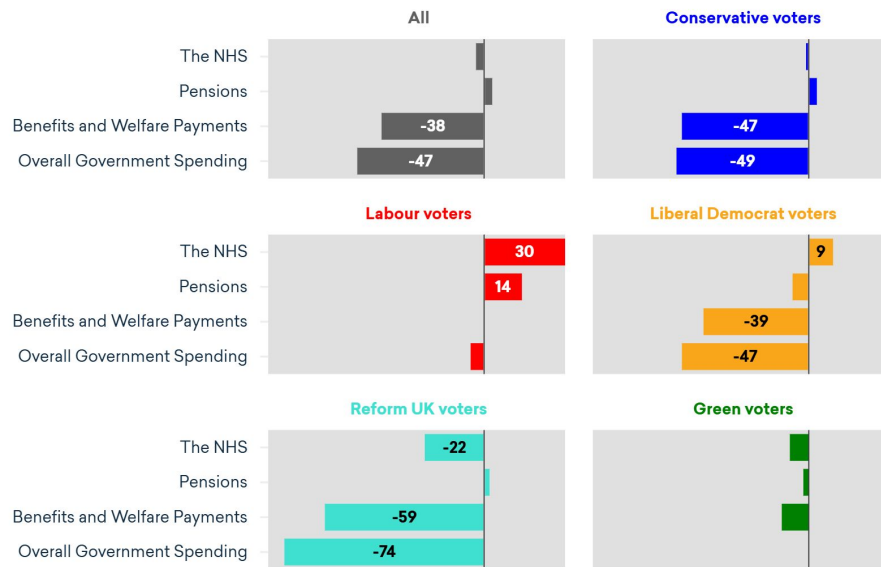
There is space for a conversation with the public on whether levels of current spending are sustainable.

Britons are now more likely than not to think NHS spending is unsustainable, and significantly more likely than not to say benefits and welfare, and overall Government spending, are unsustainable.

Voters tend to think benefits and overall government spending are unsustainable

Would you say that levels of Government spending on each of the following at the moment are sustainable or unsustainable

(Negative scores indicate areas seen as more unsustainable than sustainable)



...but not when it comes to pensions

While the public might be ready to hear difficult messages in some areas, pensions is not one of them.

Presented with two contrasting statements on the sustainability of pension spending, voters across politics and age groups prefer to see it protected.

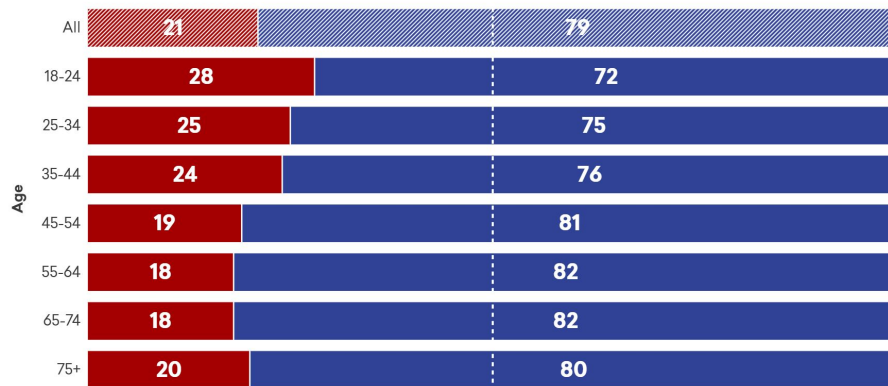
The same is true, albeit by a lower margin, of disability benefit spending.

Most britons back protecting pensions, even when confronted with the costs

Please read each of the following carefully, and choose which you would rather hear from a politician:

“Government spending on pensions is too high and will eventually bankrupt the country. It might not be popular, but we need to have an honest discussion about how we can bring the pension bill down, including reforming the triple lock.”

“People work hard for their pensions and they should be protected. We need to keep the pension triple lock and find savings elsewhere in the budget.”



Around 1 in 6 Reform voters trust the Conservatives more on economic issues

If economic issues become more salient, Conservatives are better placed to attract Reform voters than vice versa.

Party supporters overwhelmingly trust their own side: depending on the issue, 75–90 per cent of Conservative voters trust the Tories over Reform, but only about 60 per cent of Reform voters trust Reform over the Conservatives.

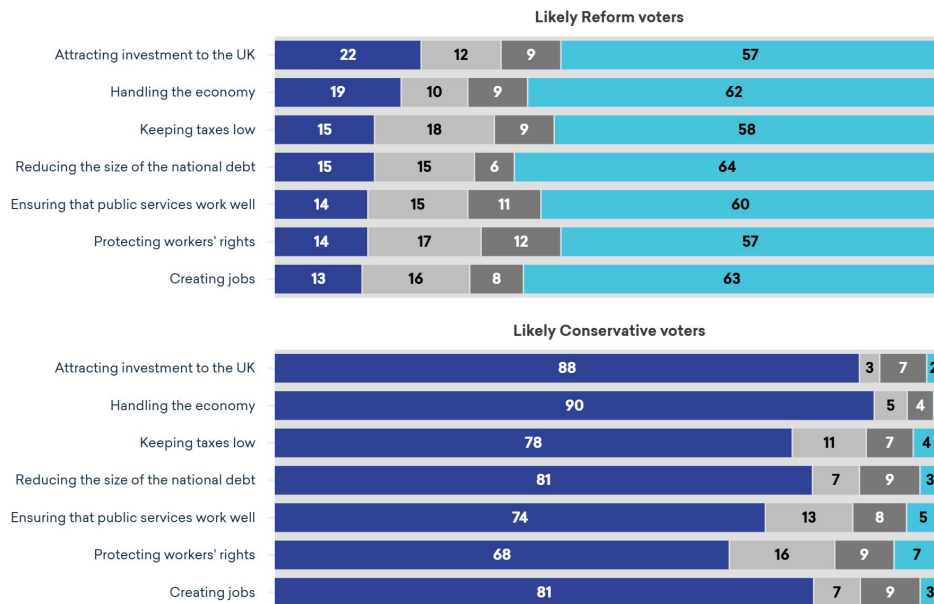
Roughly one in six Reform voters overall - and one in five on handling the economy and attracting investment - prefer the Conservatives.

Among Conservatives voters, by contrast, there is no economic issue on which more than 7 per cent trust Reform instead.

Reform voters are more likely to trust Conservatives on the economy than vice-versa

Which party do you trust more on each of the following?

● Trust Conservatives ● Neither ● Don't know ● Trust Reform



The right economic agenda could unite the Tory coalition, while the ECHR and Net Zero could divide it

The Conservatives' 2019 coalition is united on basic economic principles, but divided on many of the party's current flagship policies.

While Traditional Conservatives support the party's policies of leaving the ECHR and scrapping Net Zero, our Cameronite Established Liberals are strongly opposed to these.

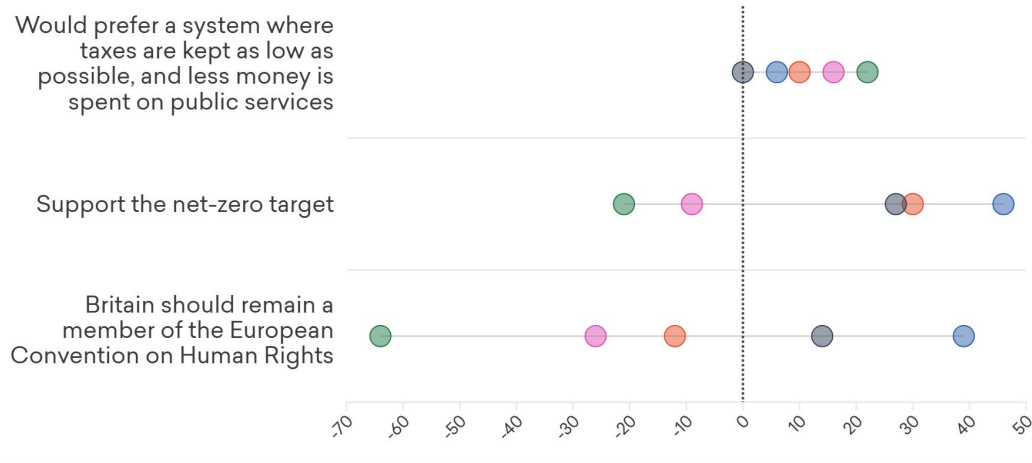
In contrast, each of the key segments lean toward the view that the state should minimise taxes and spending.

A focus on fiscal responsibility and low tax unites the different wings of the Conservatives' support base.

The Conservatives' key segments are united over tax and spending - but divided over Net Zero and the ECHR

(net agreement with each statement)

● Traditional Conservatives ● Established Liberals ● Rooted Patriots ● Dissenting Disruptors ● General public





3. Broader credibility on key issues

The Conservatives lost trust at the last election because of their handling of migration

While there is widespread disapproval of Labour's handling of immigration so far, this dissatisfaction is not limited to one party.

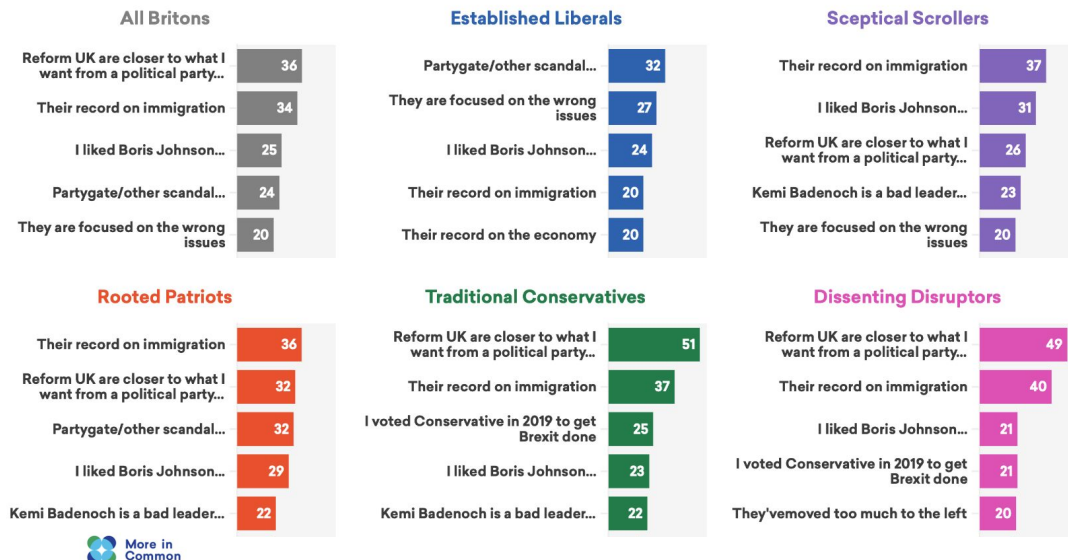
Britons see the problem of small boats and net migration as the fault of consecutive governments, including the last Conservative Government.

Asking 2019 Conservative voters why they would not vote for the party now, 34 per cent cite the party's record on immigration. This rises to 43 per cent among those who would now vote for Reform UK.

37 per cent of Traditional Conservatives - the segment which is the backbone of the Tory party - say the party's migration record was why they voted elsewhere in 2024.

Key Conservative segments who backed Boris Johnson in 2019 cite the party's migration policy as a main reason for switching their support

You said you voted Conservative under Boris Johnson in 2019, but would not vote for them if there was an election today, why is that? Choose up to three reasons from the list below.



The median voter is somewhere between the Conservatives and Reform UK

Voters want the Conservatives to be tougher on migration, but trying to outflank Reform risks overshooting the median voter.

Asked to place each party's immigration policy on a 10-point scale, from completely open to completely closed borders, the median Briton gives Labour a 3.9, the Conservatives a 5.4 and Reform UK an 8.

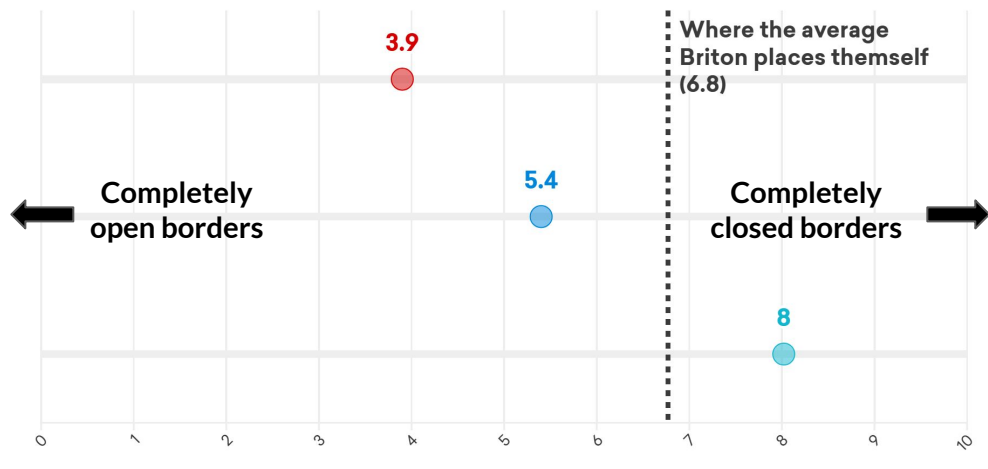
Asked to place their own ideal immigration policy on the same scale, the average Briton gives themselves a 6.8 - almost equidistant between the Conservatives and Reform.

The median voter places themselves somewhere between the Conservatives and Reform UK on migration

Sometimes immigration policies can be thought of on a scale from "completely open borders" where anyone is able to enter a country, to "completely closed borders" where no immigration is permitted at all. From what you know about the following parties, please indicate where you think their policies are on this scale, where 0 means completely open borders, and 10 means completely closed borders.

And on that same scale, which immigration policy would you personally most like to see?

● Labour ● The Conservatives ● Reform UK



A median voter immigration policy

Reform UK is the party most trusted with tackling immigration by voters.

However many (37 per cent) consider Reform UK's positioning on immigration too tough. **Among every voter group except Reform voters, pluralities believe Reform's policies are too tough.**

The public also questions the feasibility of Reform UK's policies: only 30 per cent of those who do not currently support Reform think that the party will be able to successfully end small boat crossings.

A pragmatic approach to migration could help to rebuild trust in the Conservative Party while creating a point of difference from Reform.

Many Britons think that Reform's migration policy is too tough

From what you've seen and read, would you say that the following parties' immigration policies are...

● Far too weak ● A bit too weak ● About right ● Don't know ● A bit too tough ● Far too tough



More in
Common

More in Common • September 2025

"But the thing that gets me personally with reform, he's very good at pointing out what's wrong. I won't argue a great deal with the sort of things, the immigration thing (...) but there's no answers to sort it out."

Darren, Retired, North East Hertfordshire

The public sees abolishing Indefinite Leave to Remain as unfair

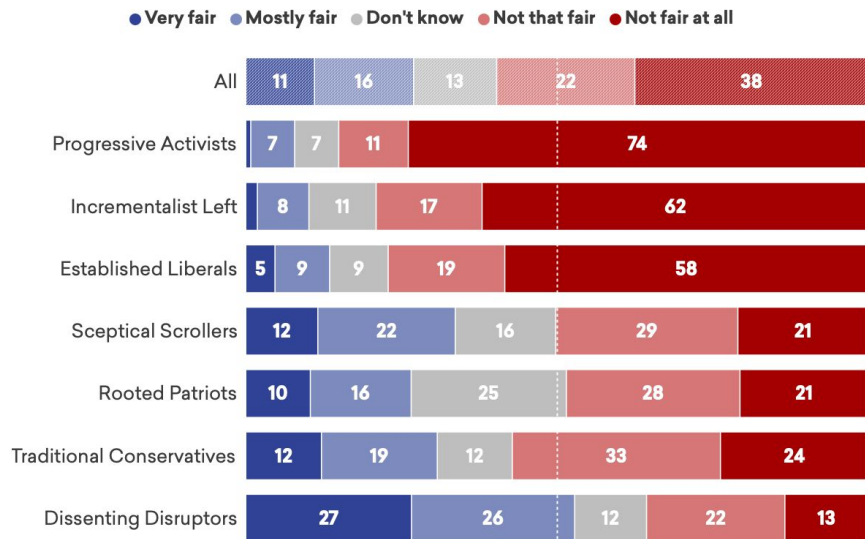
Public opinion is divided on Reform's proposals to abolish ILR: roughly a quarter support keeping it, a quarter support extending the waiting period to 10 years, and a quarter support abolishing it entirely.

Dissenting Disruptors, the most radical segment and core of Reform's base, are the only group with a majority in favour of abolition. Among Traditional Conservatives, 40 per cent support abolition, while 48 per cent prefer keeping or reforming it. Rooted Patriots are more likely to say it should remain and be amended than be abolished.

While voters want action on migration, the policy of removing ILR from those already with it appears unfair: 70 per cent of Tory-Liberal Democrat/Labour/Green switchers view removing ILR from those previously granted settled status as unfair, as do 37 per cent of Tory-Reform switchers.

Dissenting Disruptors is the only segment where a majority think Reform's proposal to revoke settled status would be fair

If Indefinite Leave to Remain were abolished, and people who had previously been told they were permanently settled were now told that they were no longer allowed to stay in the UK, do you think this would be...



Voters want the Conservatives to set out a tougher stance on migration

The public wants the Conservative Party to be setting out a tougher stance on migration. **47 per cent** say the party should be doing this as a priority, reaching **68 per cent** or more among the segments which made up the bulk of the 2019 Conservative coalition.

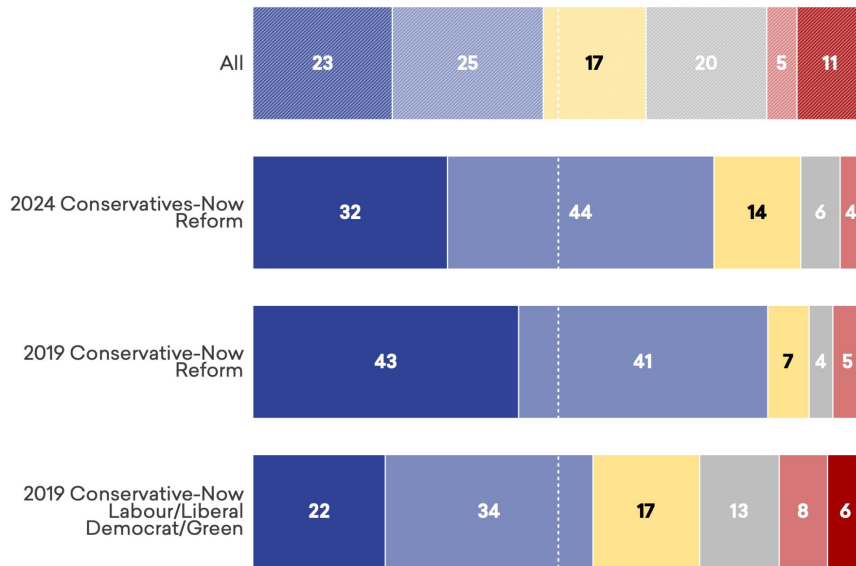
More than seven in ten of those who have switched from supporting the Conservatives to Reform at or since the 2024 election say the same.

Meanwhile half of those who have switched from the Conservatives to the Greens, Liberal Democrats or Labour since 2019 also say that the Conservatives' current migration policies are too weak.

Those who defected from the Conservatives to other parties on the left and right believe the party's migration policies are too weak

From what you've seen and read, would you say that the Conservative Party's proposed immigration policies are...

● Far too weak ● A bit too weak ● About right ● Don't know ● A bit too tough ● Far too tough



The ECHR divides the Conservatives' support base

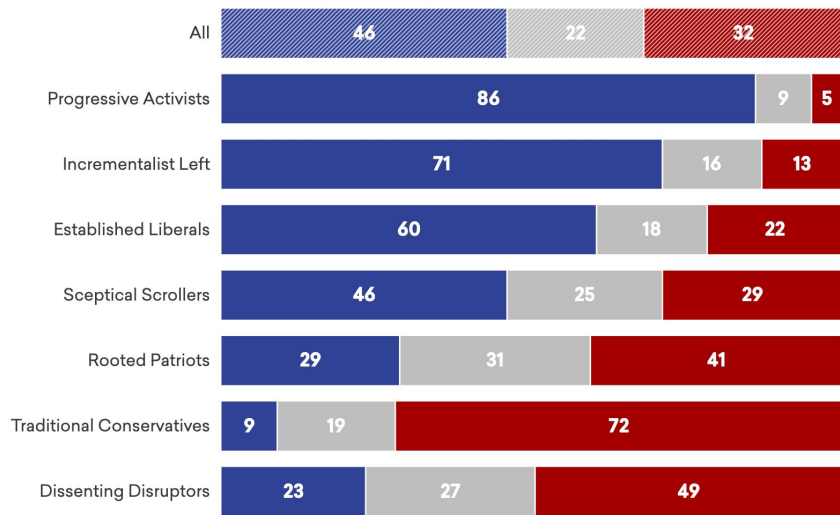
The Conservative Party's support base is split on the European Court of Human Rights: 37 per cent want to remain a member, while 47 per cent believe we should leave.

This is a wedge issue for the current Conservative voters: Traditional Conservatives, who make up one quarter of the current voter base are strongly in favour of leaving the ECHR, while Established Liberals, who make up one fifth, are strongly in favour of remaining.

32 per cent of Britons support leaving the ECHR

Which of the following comes closest to your view?

- Britain should remain a member of the European Convention on Human Rights
- Don't know
- Britain should leave the European Convention on Human Rights



Ukraine

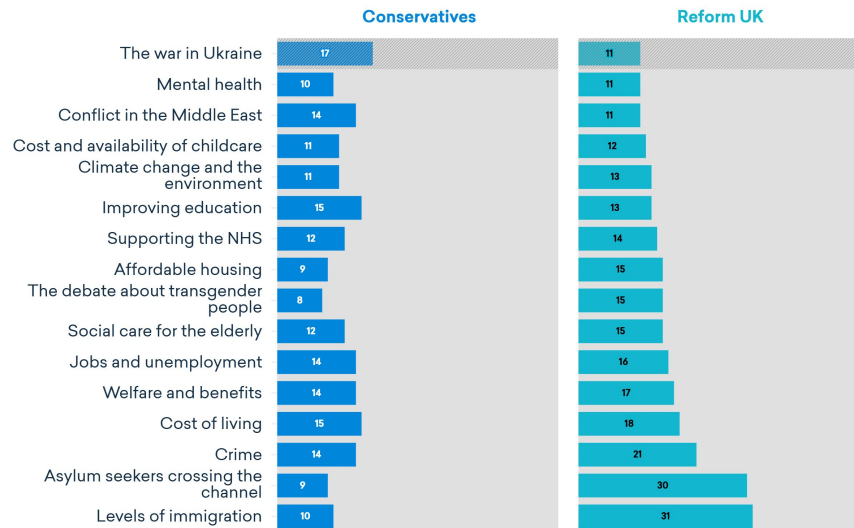
The Conservatives' record on the conflict in Ukraine is one of their strongest appeals to the public and the issue on which they are most trusted, while it is also where Reform is trusted least.

This matters for winning back voters who have defected to Reform: Conservative–Reform switchers are notably more supportive of Ukraine than Reform's base and more likely to see its defence as important.

Nigel Farage's perceived wavering may be a liability for Reform: only 27 per cent of the public think he sympathises more with Ukraine than with Russia, compared to 43 per cent for Kemi Badenoch (despite her lower visibility).

Ukraine is the issue on which Britons trust the Conservatives the most, and Reform the least

Which of the following parties do you trust most on each of the following issues?



America

MAGA is not a model for the Conservatives to follow. Three in five Britons say they want Britain to be less like America, a viewpoint that spans across every segment (only among Dissenting Disruptors do fewer than half want to be less like the US).

For Reform UK, Farage's personal connection to Donald Trump consistently ranks as one of the top reasons not to vote for Reform and people see Reform as the most "American" party.

The Conservative Party's key segments (Established Liberals, Traditional Conservatives and Rooted Patriots) are repelled by the radical change and instability that the US President represents.

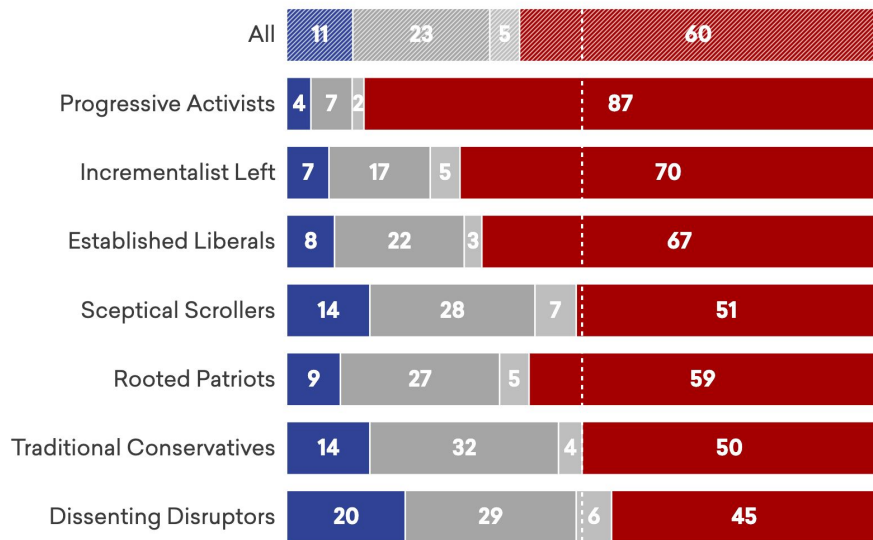
"I also wouldn't necessarily want crazy change we've seen in other countries where it is like, oh, okay, that's quite scary for me."

Adam, Teacher, North East Hertfordshire

Few Britons want Britain to be more like America

Do you want Britain to be more or less like America?

● More like America ● No more or less like America ● Don't know ● Less like America



Conservative voters want to keep working toward Net Zero

Conservative supporters are nearly twice as likely to support as to oppose the net zero target.

Where Conservatives differ from other voters is in their views on the importance of a strict 2050 target: 56 per cent say that the target doesn't need to be a strict 2050 target but that we should still work toward it; only 16 per cent would support scrapping the target altogether.

The public is responsive to climate conscious policies, and want the Conservative Party to reflect this.

Britons are twice as likely to support than oppose net zero

The Net Zero target is a target set by the UK government to reach zero greenhouse gas emissions by 2050 at the latest, balancing any carbon emissions that are produced with carbon-reducing measures (e.g., planting trees), in order to reduce the risks from climate change.

To what extent do support or oppose the UK's target of becoming Net Zero by 2050?

● Strongly support ● Slightly support ● Neither support nor oppose ● Don't know
● Slightly oppose ● Strongly oppose





Rebuilding a voter coalition

An 'on the winning side' strategy

Based on the latest MRP projection, a merged Reform-Conservative party would win a majority - even against a progressive alliance.

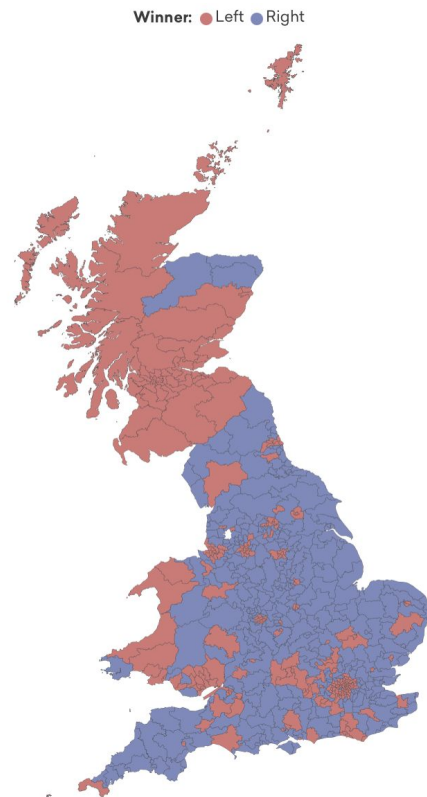
Scenario:

- Labour, Liberal Democrat, Green, SNP, Plaid and Independent votes all go to a progressive alliance
- Conservative and Reform votes go to a united right bloc

Result:

Left wing bloc
Right wing bloc

	<u>Seat count</u>
Left wing bloc	274
Right wing bloc	357



Potential voters want to see the Conservatives take the fight to Reform

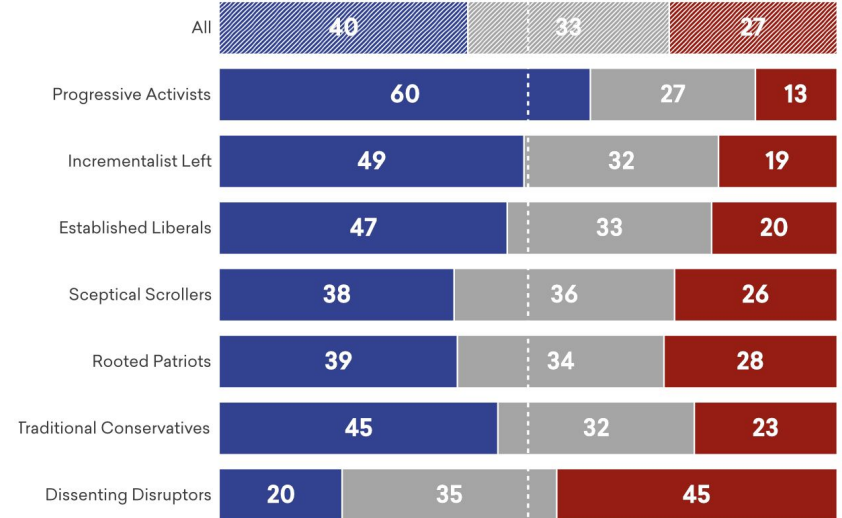
Every segment other than Dissenting Disruptors (Reform's base) is likely to say the Conservatives haven't focused enough on attacking Reform UK.

In particular, Established Liberals and Traditional Conservatives - two key segments in the Conservative voting coalition - are twice as likely to say the Conservatives need to focus more on attacking Reform UK than to say the opposite.

Britons think the Conservative party should be more focused on attacking Reform UK

Which of the following comes closest to your view? In the last year...

- The Conservatives haven't focused enough on attacking Reform UK
- Don't know
- The Conservatives have focused too much on attacking Reform UK



A 'chase Reform switchers' strategy

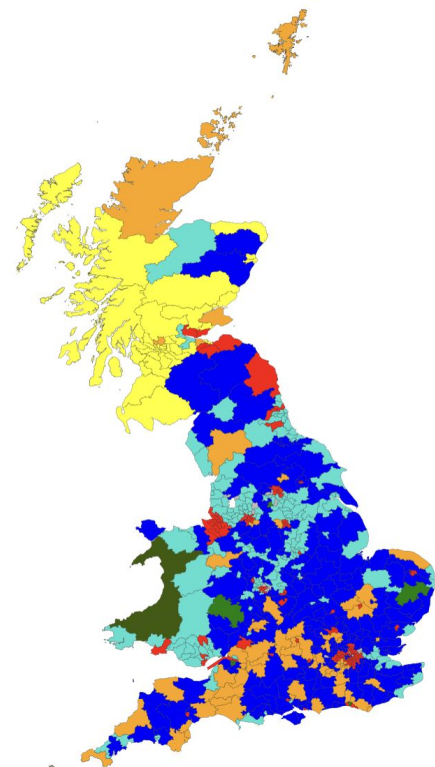
Voters switching from Conservative to Reform contributed to Conservative losses at the 2024 General Election, which saw Tory support shrink to its base. Yet since the election, a further quarter of this base has also drifted to Reform. Pulling these voters back would be electorally rewarding - if effective, such a strategy could reinstate the Conservatives as the largest party.

Scenario: 20 per cent of Reform supporters return to the Conservatives.

Result:

	<u>Seat count</u>	<u>Change vs MRP</u>
Labour	125	+35
Reform	171	-202
Conservative	201	+160
Liberal Democrat	68	-1
SNP	39	+5
Other	17	+3
Green	7	+1
Plaid Cymru	3	-1

Winner: Reform UK Liberal Democrat Scottish National Party (SNP) Labour
Other The Green Party Plaid Cymru Conservative



Conservative to Reform switchers are not Reform's base

Traditional Conservatives make up the largest chunk of Conservative-Reform switchers of any segment.

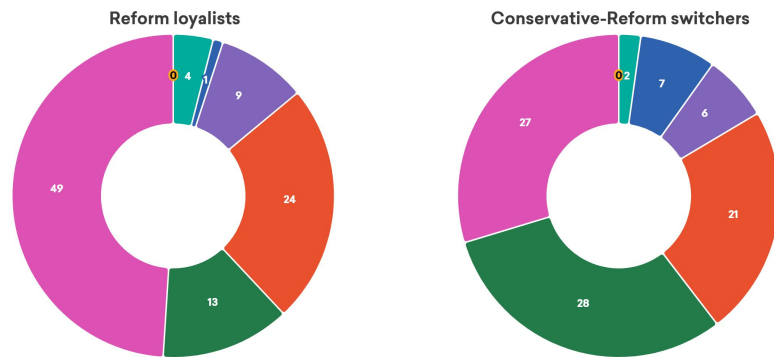
Unlike the Dissenting Disruptors who make up Reform's core, Traditional Conservatives value stability: **80 per cent** say Britain's institutions are worth preserving, compared with just **40 per cent** of Dissenting Disruptors. They are sceptical of radical solutions and **want credible, steady leadership**.

Leaning into institutional stability and pride in Britain's democratic heritage could boost the Tories' appeal with this group - but only if the Conservatives can themselves present a credible alternative.

Traditional Conservatives are the most prevalent segment among Conservative-Reform switchers

Segment breakdown of Reform UK supporters

Progressive Activists Incrementalist Left Established Liberals Sceptical Scrollers Rooted Patriots
Traditional Conservatives Dissenting Disruptors



Rooted Patriots differ from Dissenting Disruptors

Rooted Patriots (the 'Red Wall' segment) were central to the Conservatives' 2019 coalition, but Reform UK now leads them by 18 points.

Unlike Reform's core base of Dissenting Disruptors, Rooted Patriots prioritise stability and gradual change over radical disruption. Both groups backed Brexit and favour lower immigration, yet they diverge sharply on values.

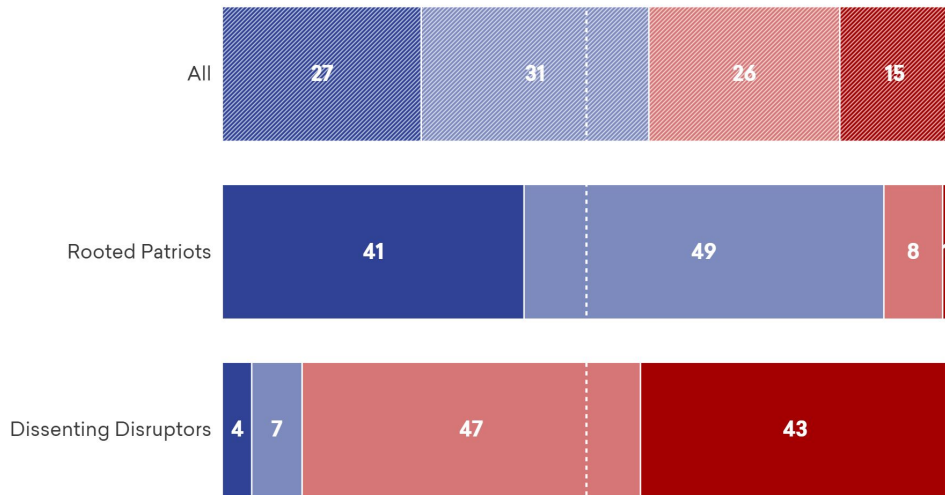
On free speech, for example, Rooted Patriots want protections against harmful content and strongly support measures like the Online Safety Act, while Dissenting Disruptors are often free speech absolutists.

Rebuilding the Conservatives' coalition may depend on focusing on Rooted Patriots, without conflating them with Reform's unreachable base.

Rooted Patriots and Dissenting Disruptors disagree on free speech

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.



Building back to 2019

Of 2019 Conservatives who have switched to another party, most have chosen Reform.

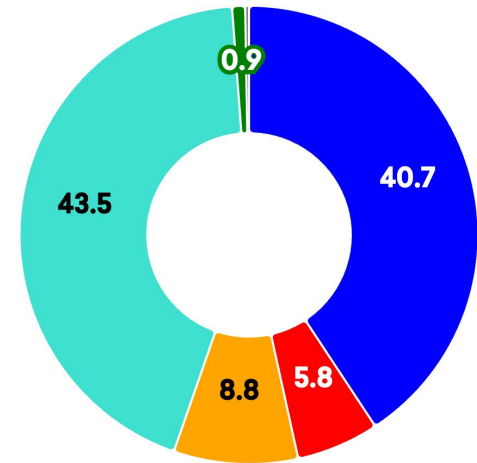
Rather than chasing them by straying into Reform's territory, another strategy would see the Conservatives pursue the remaining quarter of 2019 Conservatives. 15 per cent of switchers now support the Liberal Democrats while 10 per cent support Labour.

44 per cent of those who voted Tory in 2019 have switched to Reform UK

How those who voted Conservative in the 2019 General Election, under Boris Johnson, would vote today

- Conservative
- Labour
- Liberal Democrat
- Reform UK
- The Green Party
- Another party/Independent Candidate

2019 Tory Voters Current Voting Intention



A 'revive the centre' strategy

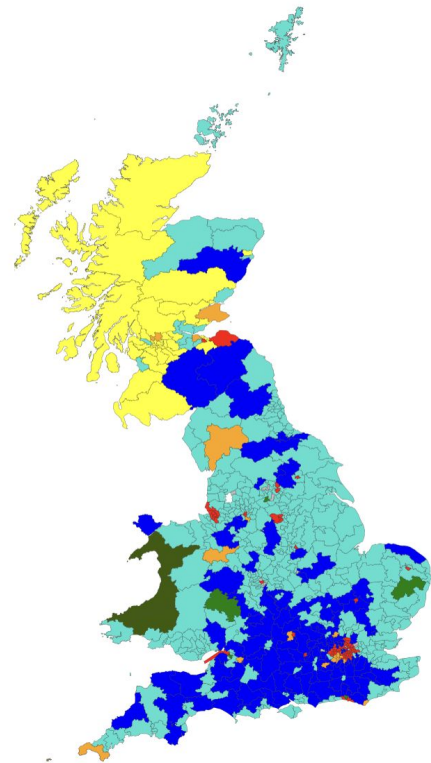
Just two in five 2019 Conservative support the party today. 15 per cent would now vote Liberal Democrat or Labour. Rather than fighting Reform on their turf, the Conservatives could pursue a more centre-focussed strategy to attract these voters back. This could see the Conservatives triple their seats (from latest MRP projection) but would leave Reform positioned to take a majority.

Scenario: Win back the one in four current Liberal Democrats and one in ten Labour voters who voted Conservative in 2019

Result:

	<u>Seat count</u>	<u>Change vs MRP</u>
Labour	71	-19
Reform	360	-13
Conservative	125	+84
Liberal Democrat	18	-51
SNP	35	+1
Other	13	-1
Green	6	NC
Plaid Cymru	3	-1

Winner: Reform UK Scottish National Party (SNP) Labour Liberal Democrat
Other The Green Party Plaid Cymru Conservative



A 'rebuild the coalition' strategy

Around 15 per cent of current supporters of Labour, the Liberal Democrats and Reform respectively consider the Conservatives their second choice party. The Conservatives could become the largest party again by attracting these voters. But it would require a **three-pronged approach**: winning back 2019 Conservatives who voted Labour in 2024, the conservative flank of the Liberal Democrats and the moderate flank of Reform's support.

Scenario: 15 per cent of current Labour, Liberal Democrat and Reform UK voters switch to Conservatives

Result:

	<u>Seat count</u>	<u>Change vs MRP</u>
Labour	75	-15
Reform	193	-180
Conservative	269	+228
Liberal Democrat	30	-39
SNP	40	+6
Other	14	NC
Green	7	+1
Plaid Cymru	3	-1

Winner: Reform UK Liberal Democrat Scottish National Party (SNP) Labour
Other The Green Party Plaid Cymru Conservative

