

# What next for the Liberal Democrats?

September 2025 Chris Annous & Louis O'Geran

### The electoral background

#### **Progressive Activists**

### t Left

#### **Incrementalis Established** Liberals



#### Sceptical **Scrollers**



#### Rooted **Patriots**



**Traditional** 















**Dissenting** 

...an outspoken group that is politically engaged and social justice but feeling alienated

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

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

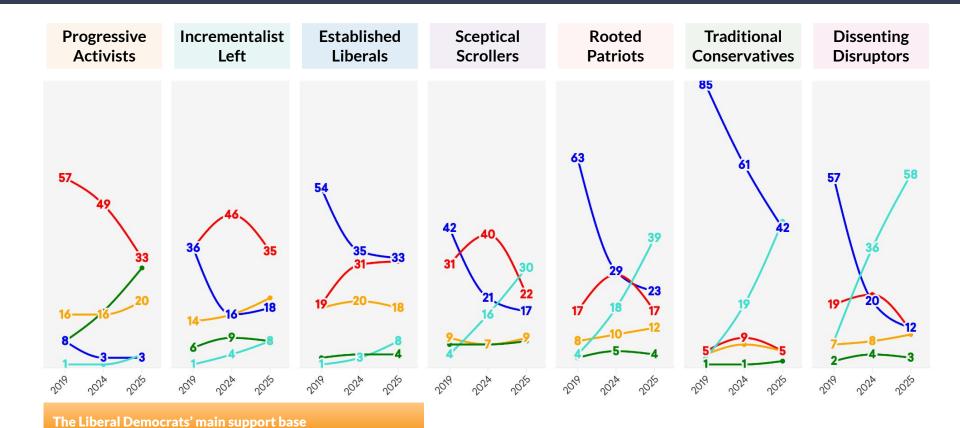
...a disengaged group that has lost trust in mainstream institutions and increasingly looks online for sources of truth

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

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

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

#### The Liberal Democrats' electoral coalition



### The Liberal Democrats' supporter base is dominated by 'Left'-leaning segments

#### Liberal Democrat voters are mostly Incrementalist Left, Progressive Activists and Established Liberals

Segment split of current Liberal Democrat voters (by headline voting intention)



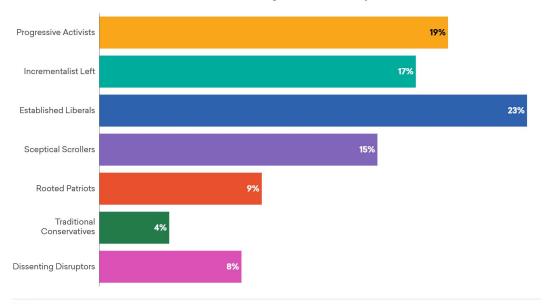
The Liberal Democrats' core base is made up of Incrementalist Left, Progressive Activists and Established Liberals.



#### Where could the Liberal Democrats go next?

#### Nearly a quarter of Established Liberals would consider voting Liberal Democrat

Which other parties, if any, might you consider voting for?
% who select Liberal Democrats, excluding those who already intend to vote for them



There is further space for the Liberal Democrats to grow their support among their three core segments.

The largest willingness to vote Liberal
Democrat can be found among Established
Liberals: nearly a quarter of Established
Liberals who aren't already doing so are open
to voting Liberal Democrat.

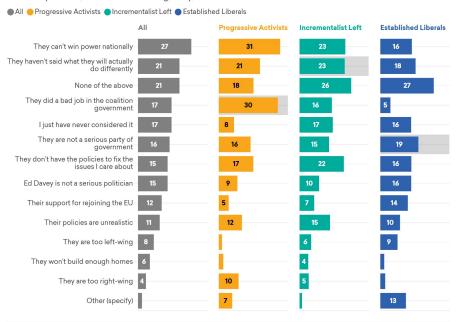
However, their larger segment size means the Incrementalist Left makes up the highest proportion, 23 per cent, of Lib Dem considerers with 20 per cent of Lib Dem considerers Progressive Activists and 17 per cent Established Liberals



### The barriers the Liberal Democrats may face with different segments

#### What's stopping the different segments from voting Liberal Democrat?





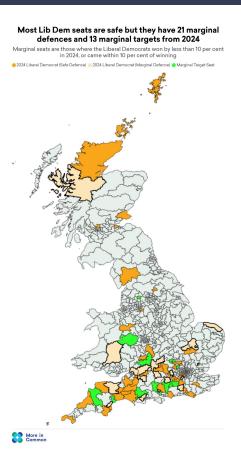
For Incrementalist Left Britons, the barrier to voting Liberal Democrat is that the party hasn't set out a clear alternative to Labour. For Progressive Activists wary of shifting to the Liberal Democrats instead of other alternatives on the left, the challenge is the party's time in coalition with the Conservatives. Emphasising their progressive credentials among these segments on issues like climate, international affairs or Europe may help to provide clear difference from Labour and the Conservatives

The biggest barrier for Established Liberals is a perception that the Lib Dems are not a serious party of government.



More in Common • June 2025

#### The picture from 2024 GE: Entrenched



#### **Defence**

51 of the Liberal Democrats' 72 seats were won by a majority of more than 10 per cent.

21 of the Liberal Democrats' wins were marginal - won by a majority of less than 10 per cent. The Conservatives are the second placed challenger in all but one of these seats (the SNP in Inverness being the lone exception).

The Liberal Democrats are, somewhat, insulated from Reform's surge. Only two Lib Dem held seats would fall to Reform on a 10 per cent swing - Brecon and Newton Abbot. Though a total Conservative collapse could change this

#### Offence

The highly concentrated nature of support for the Lib Dems left few obvious future gains for the party - just 13 seats would fall to the party on a 5 per cent swing.

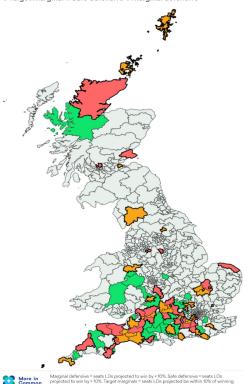
11 of these are held by the Conservatives - with just two Labour constituencies vulnerable on this swing.

#### The picture now: Open floor

More in Common's July MRP suggests up to 103 seats are within touching distance for the Liberal Democrats

Reference point for gains and defences is July MRP not GE result

• Target Marginal • Safe defensive • Marginal defensive



have historical strength in or won in 2024

#### **Defence**

More in Common's July MRP predicted the Liberal Democrats would likely win 73 seats.

Of these, 39 would be considered safe, won by more than 10 per cent, and 34 would be marginal. Among those marginal seats, the Conservatives are second in 29, Reform in four and Labour in one.

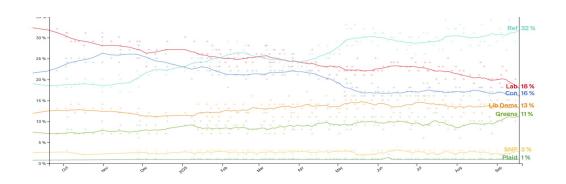
#### **Offence**

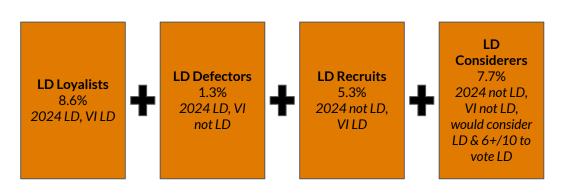
The collapse in support for the Conservatives and Labour presents an, opportunity for the Liberal Democrats to break through the 100 seat barrier.

There are 30 seats in our MRP model where the Liberal Democrats either have historical strength (and are within a 5 per cent swing of winning) or held at the last election but are behind in the MRP. The Conservatives are projected to win 19 of these constituencies, Reform eight, Labour two and the SNP one.

If the Lib Dems are to win 100 seats it is likely to come through winning seats from parties to their Right.

#### The path to 20%



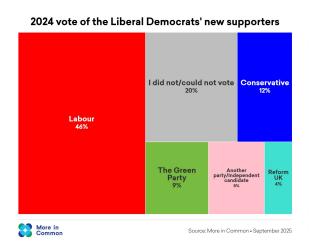


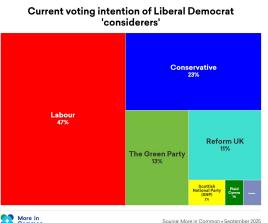
Despite wider volatility the Liberal Democrats' polling has been almost consistently between 13 and 15 per cent over the last year, despite the significant churn in the party's voter base.

However, the party has the potential to grow its share of the vote:

- Almost a third (30 per cent) of voters would at least consider voting Liberal Democrat.
- Almost a quarter (23 per cent) of voters say they would seriously consider voting Lib Dem, defined as saying they would consider voting Lib Dem and having a self-reported likelihood of voting Lib Dem at six or more out of ten.

### Growth in support for the Liberal Democrats is currently coming from their Left





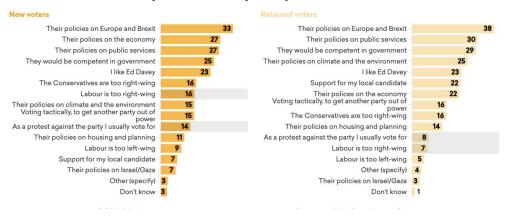
The Lib Dems' post-election recruits are disproportionately former Labour voters - nearly half (46 per cent) of those who didn't back the Lib Dems last year but now intend to vote for the party supported Labour at the last election. Almost 1 in 5 current Liberal Democrat supporters voted for Labour in 2024, while a further 6 per cent voted for minor parties or independents and 6 per cent did not vote.

Nearly half of Lib Dem considerers are 2024 Labour voters as well

Nearly one in ten 2024 Labour voters have already switched to the Lib Dems and up to a quarter of Labour's 2024 vote (24 per cent) would meaningfully consider voting Lib Dem.

### These new recruits share similar views to 2024 Lib Dem voters with a more progressive streak

#### You said that you would vote for the Liberal Democrats if an election were held today - why is that? Select your top three reasons.



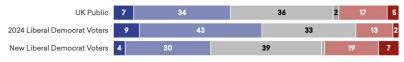
On values and policy, the Liberal Democrats' new recruits are closely aligned with those who backed the party in 2024. Their reasons for voting for the party are also broadly aligned - the party's policies on Europe are the top factor for both.

However, their new recruits are slightly more firm in their progressive inclinations. They are more likely to say they want to vote Lib Dem because Labour is too right-wing and they see the Lib Dems as a protest vote. In contrast, Lib Dem loyalists are more localist and are much more likely to say they are backing the party to support their local candidate. 16 per cent of both old and new supporters cite the Conservatives being too right wing as a top factor for voting Lib Dem.

### The Lib Dems' new voters are slightly less 'Blue Wall' than their 2024 voters

#### Compared to their 2024 voters, those who have switched their support to the Liberal Democrats since the General Election are less financially comfortable ...





#### ... less likely to own their own home ...



#### ... and less old



While their views and attitudes are broadly aligned, there are some notable differences in the demographics of the new recruits to the Lib Dems.

They are younger, less financially secure and less likely to be home owners than their 2024 voters. They are also more likely to live in cities or large towns, more ethnically diverse, and less likely to have a degree.

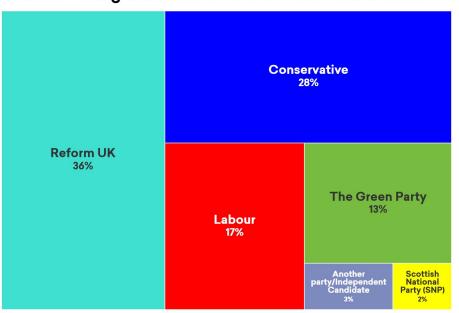
In total, they don't neatly fit the description of the Blue Wall voter the party targeted so effectively ahead of the last election.



New Liberal Democrat Voters

### The voters who have left the Lib Dems have gone to their Right

#### **Current voting intention of Liberal Democrat 'defectors'**



A fifth (19 per cent) of 2024 Liberal Democrat voters currently intend to vote for another party.

While the party is recruiting voters mainly from its Left, it is shedding defectors mainly to its Right - two thirds (64 per cent) of the voters the party is losing are going to the Conservatives and Reform.

Given the party's battlegrounds continue to predominantly be Conservative-facing, this risks undermining the efficiency of the party's vote and raises challenges for their ability to retain and gain more seats.



The three challenges facing the Liberal Democrats

### if they are to take advantage of their political

While the Liberal Democrats have continued to consolidate their vote since the General Election with strong local election results, they are yet to truly breakthrough: both their polling numbers and projected seats have barely budged.

More in Common's research has identified three challenges or tests the party must overcome if they are to breakthrough:

- 1. Seriousness
- 2. Purpose
- 3. Change

### Are the Lib Dems a serious party?

### clear plan about what they'd want to achieve in

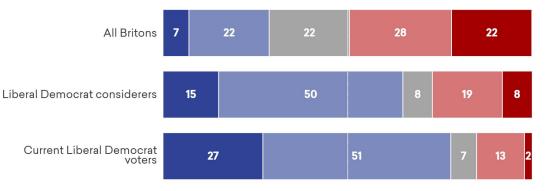
govornment

#### More than a quarter of those considering voting for the Liberal Democrats believe they don't have a clear plan for government

For each of the following parties, please indicate whether you think they have a clear plan for what they want to achieve in government:

#### The Liberal Democrats

- They have a very clear plan for government
  They have guite a clear plan for government
  Don't know
  - They don't have a very clear plan for government
    - They don't have a plan for government at all



A key barrier facing the Liberal Democrats is that many voters don't know what they would like to achieve in government and are unsure if they even have a plan.

Half of Britons say the Liberal Democrats do not have a clear plan for government, with 29 per cent believing they do.

Even among those considering the Liberal Democrats, there is some doubt: more than a quarter (27 per cent) say the party doesn't have a clear plan.

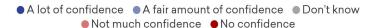
This is particularly a barrier for the Established Liberal Segment, the segment closest to 'Blue Wall' voters,: their biggest reason *not* to vote Liberal Democrat is a perception they are **are not a serious party of government**.

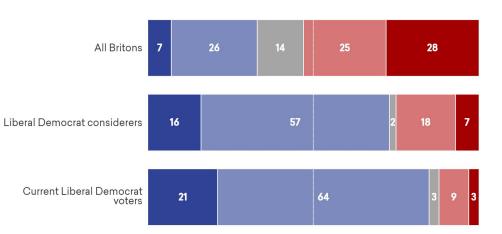


### Most Britons lack confidence in the Liberal Democrats to be effective in a coalition

#### A third of Britons would have confidence in the Liberal Democrats to be part of a coalition

How much confidence, if any, would you have in the Liberal Democrats if they were to enter government as part of a coalition?







If the Liberal Democrats are to enter government, it will likely be through a coalition - but most Britons think they are not ready for a coalition.

53 per cent would have little or no confidence in the Liberal Democrats if they were to enter government as part of a coalition.

Even among those who are supportive of the Liberal Democrats, doubts remain over how they would perform in government. Just a fifth (21 per cent) of current Lib Dem voters say they would have a lot of confidence in the party, while a quarter (25 per cent) of those considering voting for the party either say they would not have much confidence or would have no confidence at all.

In focus group conversations, Lib Dem voters raise concerns over whether the party would be hard nosed enough to drive through change and manage negotiations.

I just don't know whether they would be able to manage in government. I don't know. They've got no experience.

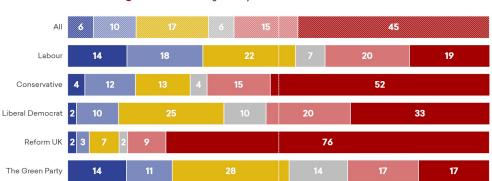
Andrew, architect, Yeovil

### Is the party ready to confront hard issues like immigration?

#### Most Britons want the Government to reduce the number of migrants entering the country

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







Source: More in Common • June 2025

You've got 6-700,000 people coming to this country... these people are putting such a big strain on the NHS, strain on the housing market.

Andrew, Architect, Yeovil

We're so fortunate in this country, we should be able to help these people [asylum seekers].

Charlotte, Business Development Manager, Yeovil

If the Liberal Democrats want to be seen as a serious party of government, they must confront the big issues facing the country.

Immigration and asylum is now the second most important issue for Britons and third most important issue for Lib Dem voters.

However, voters aren't clear what the party's immigration policies are or whether the party would plan to bring immigration down.

While Lib Dem voters prefer to try to balance control with compassion, they overwhelmingly think it is important to stop Channel crossings and to bring down migration levels.

The Lib Dems do not need (and would be unlikely to be convincing) to try and out match the toughness or rhetoric of Reform, they do need to reassure their voters that they have a serious plan to bring down net migration levels and to get control of Britain's borders.

### The Lib Dems' stunts are making it hard to present themselves as being serious

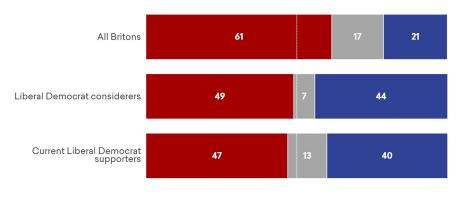
#### Three in five Britons - and half of Liberal Democrat supporters - think Ed Davey's stunts make the party look less serious

Some politicians take part in stunts or activities to try to gain media coverage for their policy announcements. Ed Davey, Leader of the Liberal Democrats, has done this – including bungee jumping and falling off a paddle board.

#### Which of the following comes closest to your view?

- The stunts make the party look less serious and are inappropriate at a time when there are so many big issues facing the country

  Not sure
- These stunts are a good way for the party to gain media coverage and help to make the Liberal Democrats seem more approachable





Source: More in Common • September 2025

Three in five Britons (61 per cent) say that Ed Davey's stunts make the party look less serious, compared to just 21 per cent who believe they are a good way to gain media attention.

The stunts are also unpopular among many Lib Dem supporters. Among the Liberal Democrats' current voters, nearly half (47 per cent) say the stunts are inappropriate and make the party look less serious, rising to 49 per cent of those who are considering voting for the Liberal Democrats.

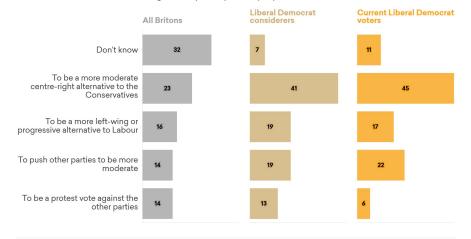
While the stunts may generate the party invaluable media coverage, if it is to present itself as a party of government capable of addressing the big problems Britons face, the Liberal Democrats should be cautious about relying solely on using stunts to get attention. Not all publicity is of equal value for political parties.

### Do the Lib Dems have a clear purpose?

### Voters aren't clear about the purpose of the Liberal Democrats

#### A third of Britons don't know what the purpose of the Liberal Democrats is

Which of the following would you say is the purpose of the Liberal Democrats?



More in Common

Source: More in Common • September 2025

"I think they are a happy medium. [between Left and Right]".

Vickie, support worker, Yeovil

Asked what they consider to be the purpose of the Liberal Democrats, Britons' most common answer is "don't know", selected by a third (32 per cent)

Among Liberal Democrat voters and considerers, there is greater clarity. They overwhelmingly see the party's function and objective as being to push the other parties towards more moderate policy solutions - and in particular to be a more moderate centre right voice to the Conservatives.

In our focus group discussion of 2019 Conservative to 2024 Lib Dem switchers in Yeovil, it became clear that this was a key driver of why they backed the party.

If they are to pursue the reserve of progressive voters open to backing them, the party should be conscious of doing so in a way that aligns with their voters' latent desire for moderation and consensus as well as pitching to the centre right voters who see Liberal Democrats as an alternative to a Conservative Party they now see as too extreme.

"I think their purpose is just to provide an alternative that's supposed to be a bit more balanced I guess, than Labour or Conservative".

Arianne, Retail Manager, Yeovil

### Ed Davey remains unknown but is seen relatively warmly by those who do know him

In a word or two, how would you describe Ed Davey?



While awareness of Ed Davey is low, those who know of him tend to describe him positively.

In focus groups, Liberal Democrat supporters often say the party leader stands out from other politicians as being genuine, kind and understanding of their concerns. In our Yeovil focus group, the main concern Conservative to Lib Dem switchers cited was that he may be too nice and not hard nosed enough.

However, few Britons have a view on him and this is contributing to a sense the Lib Dems lack a clear role to play in British politics.



"I don't really have much to say on him. I think he's a good guy. I think he wants to do well with cost of living crisis, NHS, things like that". Charlotte, business development, Yeovil "Obviously I don't know the bloke at all, but he comes across as being genuine and he's one of the senior politicians that I would be shocked if he had skeletons in his closet".

Tony, Telecoms Engineer, Yeovil

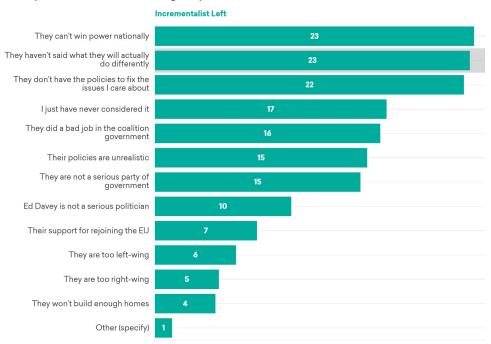
"Good guys just don't get anywhere in politics, it's only the untrustworthy (...) Ed is a bit more relatable, he feels more like a nice guy...He'll get pushed over. That's how it feels. It feels like you have to be strong and quite mean - you know, like rob your own gran to be in power. And I don't think that's him".

Vickie, support worker, Yeovil

### Not knowing what the Liberal Democrats would do differently is the key barrier to growing their support

#### Not knowing what the Lib Dems would do differently is a top barrier for Incrementalist Left Britons

In your view, which of the following, if any, are the main reasons to not vote for the Liberal Democrats ?



A lack of clarity around the Liberal Democrats' purpose is a key barrier to their support.

For both Britons overall and for Lib Dem considerers, the second top reason they see for not voting Lib Dem is "they haven't said what they would actually do differently". The biggest reason for not voting Lib Dem is the party's limited chances of winning power nationally.

In focus group conversations, few Lib Dem supporters can point to what the party would do differently compared to the current government.

"I think it would just be nice to see something different. I think because we've had Conservative government and we've had Labour government, I think it would be good to see what they [the Liberal Democrats] would do if they were in power".

Arianne, retail manager, Yeovil

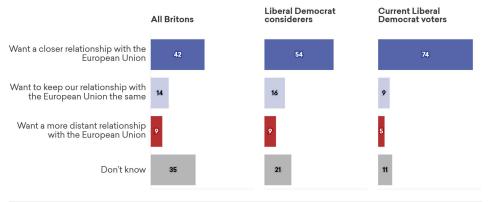


### Brandishing their credentials on Europe gives the Liberal Democrats a clear point of difference

#### Lib Dem voters are aware of the party's position on Europe but the wider public is less certain



- Want a closer relationship with the European Union
   Want to keep our relationship with the European Union the same
- Want to keep our relationship with the European Union the same
   Want a more distant relationship with the European Union





Source: More in Common • September 2025

"I feel like with the whole Brexit thing, we're just going to be paying all that off for years and years". Charlotte, business development, Yeovil Pushing for a closer relationship with Europe is an approach that appeals to the Liberal Democrats' base, but could also help them stand out with the wider electorate.

Asked why they would vote for the party, "their policies on Europe and Brexit" consistently ranks as a top issue for their voters.

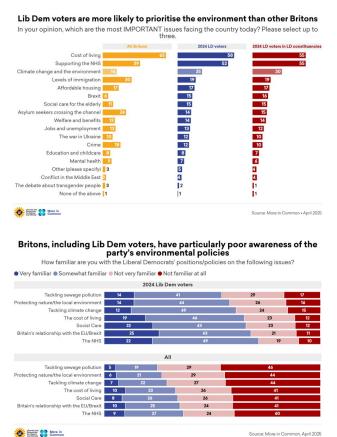
As previous More in Common research has <u>found</u>, Britons want a pragmatic and cooperative relationship with Europe.

Though, this willingness may not extend to rejoining the EU, Britons are supportive of negotiating a closer relationship with Europe, with 70 per cent of 2024 Lib Dem voters, backing a closer relationship.

There is political bandwidth for the party to be stronger in championing its pro-european values.

### Liberal Democrat voters provides a further point of

#### difforance



Liberal Democrat voters are two times more likely than Britons overall to say climate change and the environment is one of the top issues facing Britain - this is true for Lib Dem voters both inside and outside the constituencies they hold. They are more likely to think environmental issues should be prioritised by government and to be willing to bear transition costs.

More in Common's Green Foundations <u>report</u> found potential electoral benefits for the Liberal Democrats if they can establish themselves as a pro-environment party, but a particular lack of awareness of their environmental policies is preventing this.

Positioning themselves as champions of the environment would be an effective point of difference and source of purpose for the party. It may also help them to attract the many Right leaning voters who feel strongly about the environment and so are unhappy about the Conservatives' decision to jettison Britain's 2050 net zero target, a target which half (49 per cent) of current Conservative voters are supportive of. Three quarters (73 per cent) of Lib Dem voters are supportive of the net zero target.

Do the Liberal Democrats offer the change Britons want?

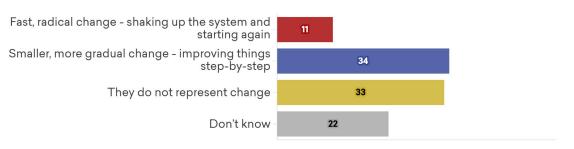
### Britons want radical change - but aren't sure the Liberal Democrats represent this

#### Most Britons think the UK needs fast, radical change - yet only 11% think the Liberal Democrats are offering this

What kind of change, if any, do you think the UK needs at the moment?



And thinking about the Liberal Democrats, would you say they represent...



Nine in ten Britons (89 per cent) believe the country needs change, including a majority (55 per cent) who believe it needs fast, radical change.

Yet only a tenth of Britons believe the Liberal Democrats offer radical change, while 34 per cent believe they represent gradual change, and 33 per cent believe they do not represent change at all.

I think they represent quite a slow change. I think they represent quite a slow, quite a laid back way of working.

Vickie, Support Worker, Yeovil

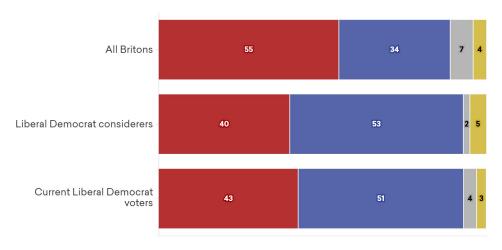


### While less supportive of radical change, Liberal Democrat voters still feel Britain needs real change

#### Liberal Democrat supporters tend to prefer gradual change

What kind of change, if any, do you think the UK needs at the moment?

Fast, radical change - shaking up the system and starting again
 Smaller, more gradual change - improving things step-by-step
 Don't know
 The UK does not need change at the moment





Source: More in Common • September 2025

Liberal Democrat voters and considerers stand out with their preference for controlled change, rather than radical upheaval.

Liberal Democrat voters are almost unanimous in their desire for change: only 7 per cent believe the UK does not need change at the moment.

However, while a majority of the wider public believe the UK needs fast, radical change, **most Liberal Democrat voters (51 per cent) and considerers (53 per cent) prefer smaller, more gradual change.** 

"Is there a medium ground? Could we change a little bit fast? Could we change some things fast and other things more gradual? So can we bring the energy prices down fast? (...) That would be a good start, and then some gradual changes".

### They may want change, but Lib Dem voters aren't anti-system

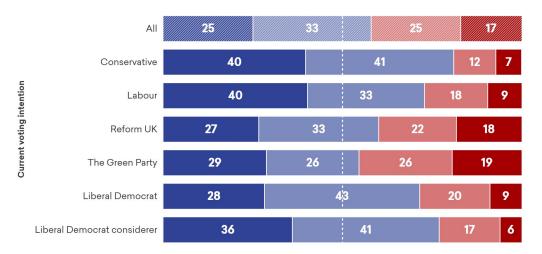
#### Liberal Democrat supporters and considerers tend to want to preserve and improve institutions

Which comes closest to your view?

●1 - Our political and social institutions are worth preserving and improving, not destroying.

3

4 - When I think about our political and social institutions. I cannot help thinking "just let them all burn."



The extent to which Britons believe our political and social institutions aren't worth preserving is a key indicator of the anti-system attitudes that drive populism.

While Liberal Democrat voters crave change, they haven't given up on the system in a way that many Reform and Green Party voters have.

Only three in ten (29 per cent) Lib Dem voters take a nihilist approach to change, compared to 45 per cent of Green voters and 40 per cent of Reform voters.



### In their own words: the kind of change Liberal Democrats want to see

While Liberal Democrat supporters are more gradualist than the general public in their view of change, this shouldn't be mistaken for complacency or satisfaction with the status quo: focus groups with Liberal Democrat voters show they are disillusioned with the state of the country. In fact for some, a desire for change is what attracts them to the Liberal Democrats.

It is in their solutions where Liberal Democrat voters diverge from Reform UK votes - where the latter want to rip up the system and start again, the former have, some, faith it is capable of delivering the improvements they demand.

"There isn't a cigarette paper between Labour and Tories. It's sort of like a continuation of policies is how it feels to me. And it was like we need something different to make the country work". Ben, project manager, Yeovil

"I think for any of them, politicians, to succeed in what they're promising us, there has to be massive fundamental change".

Tony, Telecomms manager, Yeovil I just think everyone is so beaten down right now. Everyone's morale is so bad. Tony, Telecoms Operator, Yeovil

"The country is just going one way downwards. There's no respect for anybody more." Andrew, Architect, Yeovil

"I didn't feel like we were kind of getting anywhere as a country, so I wanted to see a bit of a change and I didn't feel that Labour was the right party to vote for. So yeah, that's why I voted Lib Dem".

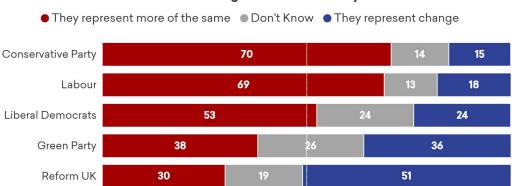
Arianne, retail manager, Yeovil

### Britons think the Lib Dems represent more of the same not change

#### Only a quarter of Britons think the Liberal Democrats represent change

Thinking about the following political parties, would you say they represent change, or represent more of the same?

#### Which of the following comes closest to your view?





Source: More in Common • September 2025

"Britain needs quite radical change - we need some sort of new direction. I couldn't tell you what that is but it needs to be away from what we've been doing.

[Asked if the Lib Dems represent this change] I haven't seen anything that would lead me to believe that.

Ben, Project Manager, Yeovil

Most Britons say the Liberal Democrats represent "more of the same".

53 per cent of Britons say the Liberal Democrats represent 'more of the same', compared to just 24 per cent who say they represent change.

Even among those *considering* voting Liberal Democrat, more than a third (37 per cent) say they represent more of the same.

It is likely the next election will be another vote for change and a key challenge for the Liberal Democrats will be articulating how they aim to transform the country in a way that meets this demand.

Conclusion - the implications for the party's strategy

#### The three paths for the Liberal Democrats

There are broadly three strategic paths for the Liberal Democrats and though not necessarily mutually exclusive, this research indicates clear tradeoffs with these strategies.

#### Localism

Continue to focus on heavily targeted campaigns fought on local issues. The party may be able to tailor its message at the local level to attract more moderate Established Liberals in the Blue Wall, and Progressive Activists disaffected by Labour in urban areas. However, without a strong national message of change the Liberal Democrats risk being frozen out of a national political debate dominated by Reform UK and the public's demand for change.

#### **Progressive Outflanking**

Seek to sweep up disaffected Labour voters by more boldly emphasising the party's liberal values from the 'Left'. There are many voters to be won in this space, although they are not efficiently distributed for the Lib Dems, and while tapping into this support may have been straightforward in a three party system, with the Greens and Your Party to compete with, the Lib Dems will need to be cautious of reaching these voters in a way that doesn't undermine the moderate politics their core supporters appreciate.

#### A moderate party of government

Focus on positioning themselves as a serious party of moderate government. Current Lib Dem voters are the most likely to back gradualist and solution focused politics and so this could help win back defectors lost to their Right - particularly if the Conservatives are perceived as too extreme. Geographically this makes sense. However, cutting through, and communicating what they stand for, may be harder and would likely require a confrontation of Britain's key challenges and the tough decisions which must be taken to address these.

## For Questions and further details

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