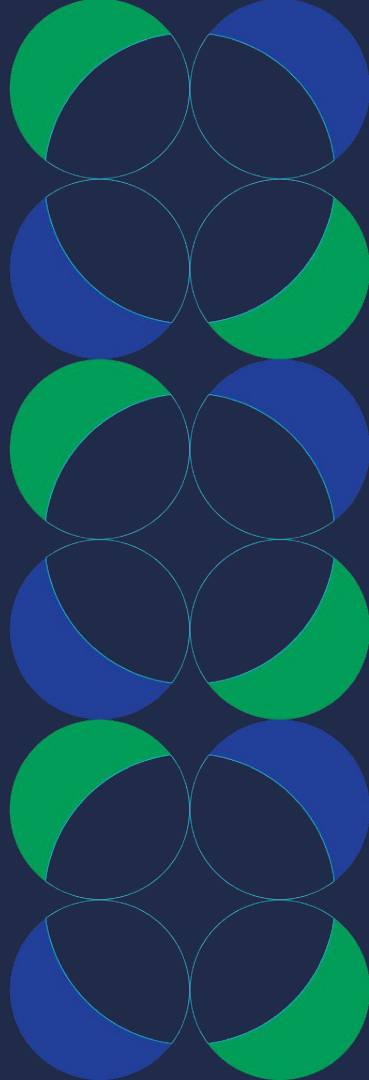




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Who and what are the Liberal Democrats for?

Liberal Democrat Party Conference 2026



Introducing the Seven Segments

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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



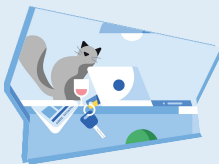
...an outspoken group that is politically engaged and globally minded, championing social justice but feeling alienated from mainstream politics

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

Incrementalist Left (21% of the population, 29% of Liberal Democrat voters)

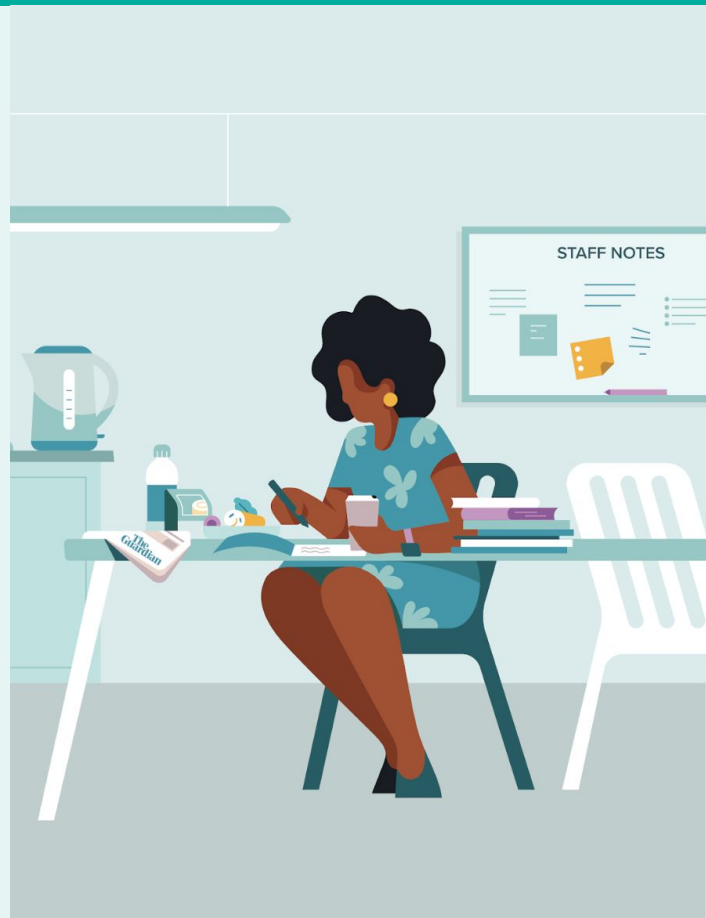
Key words: Liberal, compromising, conflict-averse, satisfied, community-orientated

Worries: Rising instability, polarisation and division, the rise of Reform UK and populist leaders across the world, the NHS and public services

Top barriers to voting for the Liberal Democrats: They can't win power nationally (27 per cent), They haven't said what they'll do differently (22 per cent), I just haven't considered it (20 per cent).

49 per cent know what the Liberal Democrats stand for, 51 per cent do not.

This segment has some similarities to the Progressive Activist although they are much more disengaged from politics, mostly driven by the fact that they are relatively happy with the status quo and find no joy in the news.



Progressive Activists (12% of the population, 23% of Liberal Democrat voters)

Key words: Idealistic, radical, uncompromising, woke

Worries: The war in Gaza, climate change, inequality, the power of billionaires, the rise of Reform UK, the Trump presidency, affordable housing, racial injustice

Top barriers to voting for the Liberal Democrats: They can't win power nationally (30 per cent), They did a bad job in the coalition government (29 per cent), They haven't said what they'll do differently (22 per cent).

55 per cent know what the Liberal Democrats stand for, compared to 45 per cent who do not know what the party stands for.

This segment is highly engaged in politics, and the only segment who say they like talking about politics with their friends. They are often at the forefront of left-wing politics, and searching for radical change.



Established Liberals (9% of the population, 16% of Liberal Democrat voters)

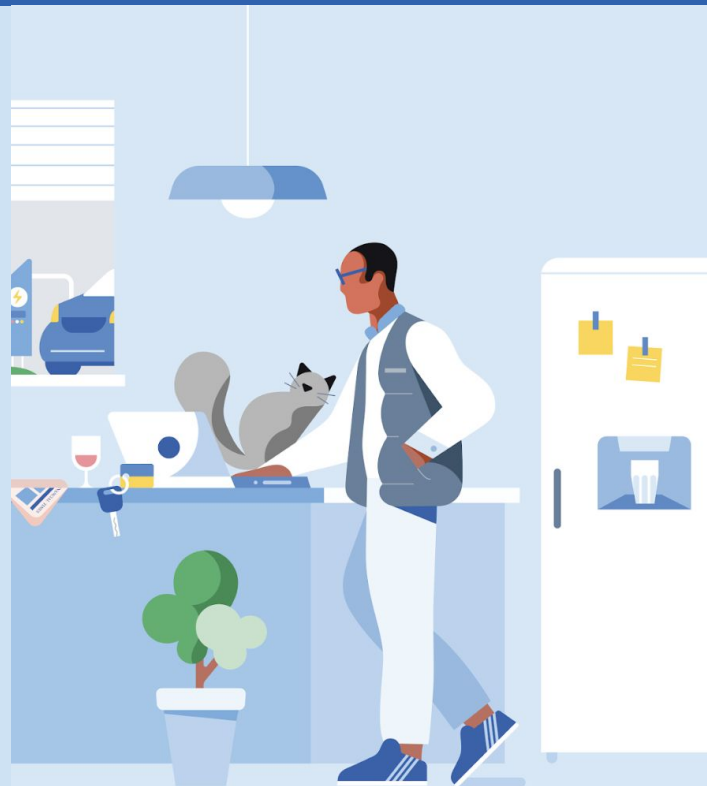
Key words: Secure, internationally-minded, trusting, liberal, meritocratic, comfortable, optimistic

Worries: Global instability and threats to democracy, climate, Brexit's impact on business and trade, economic inequality, Britain's global competitiveness

Top barriers to voting for the Liberal Democrats: They can't win power nationally (22 per cent), I just haven't considered it (18 per cent), They haven't said what they'll do differently (15 per cent).

45 per cent know what the Liberal Democrats stand for, and 55 per cent do not know what the party stands for.

This group are metropolitan, and have some of the highest levels of trust in institutions. At the same time, they are the most economically well-off – often making them feel insulated from the current issues being faced in Britain.

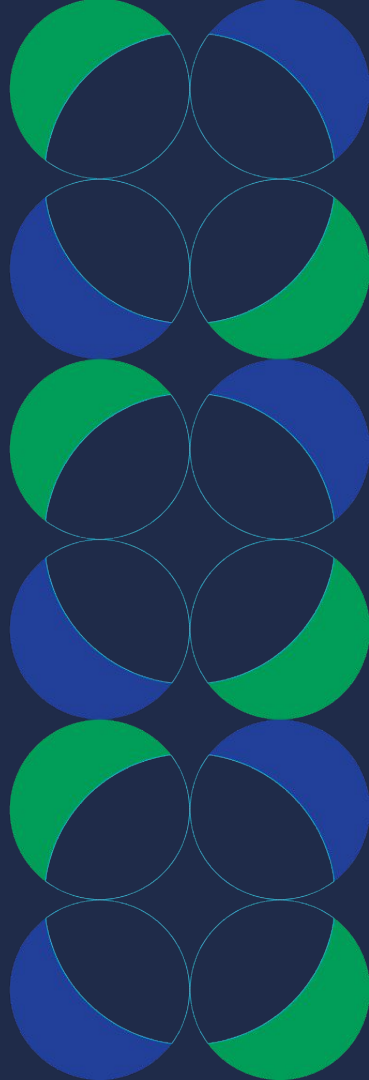




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The state of the party

Is the strategy
working?



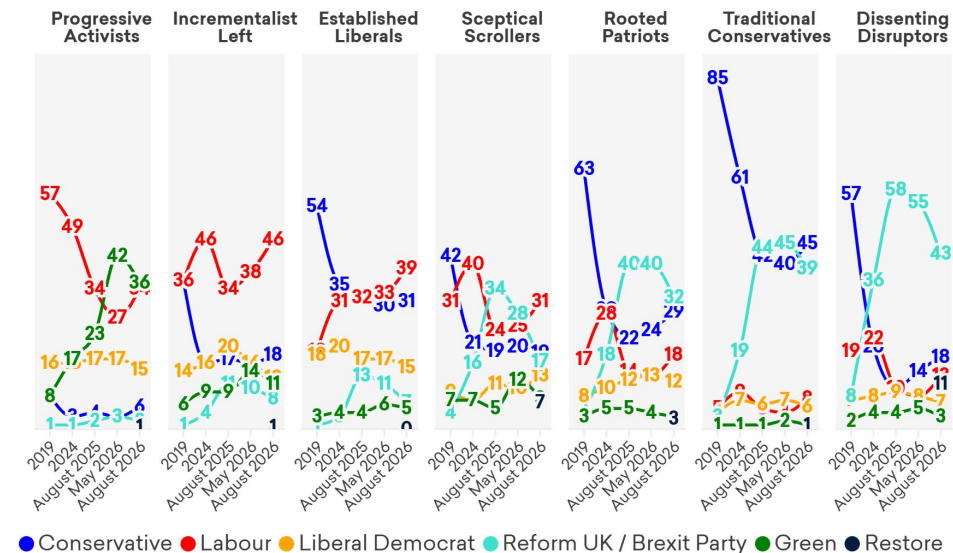
The Liberal Democrats have not broken through

The Liberal Democrats have 71 Members of Parliament – the largest third party in British politics for over a century. And yet the Liberal Democrats have not built on that foundation since, and their support has begun to erode in some segments since last year's party conference.

There are two main sources of recent decline:

- Ceding the left to Burnham:** As Starmer's government faltered with progressive voters, the Liberal Democrats made gains with left and centre-left segments, peaking at 20 per cent with Incrementalist Left. Burnham has now won back some of these progressive defectors, with Liberal Democrat support falling back to 13 per cent.
- Stalling progress with the centre-right.** Among Established Liberals, the Liberal Democrats' strongest segment in 2024, the party has now fallen by 5 points from this time last year.

Support for the Liberal Democrats has ticked down across some key segments



The Liberal Democrats began this Parliament with a deep but narrow base

In terms of seats, the Liberal Democrats' 2024 result was the best performance for a third party since 1923. Yet in terms of votes, it was relatively modest.

This means that 2024 was a remarkably efficient result: **their vote share rose, on average, by 12 points in seats they won, and fell by 1 point in seats they lost.**

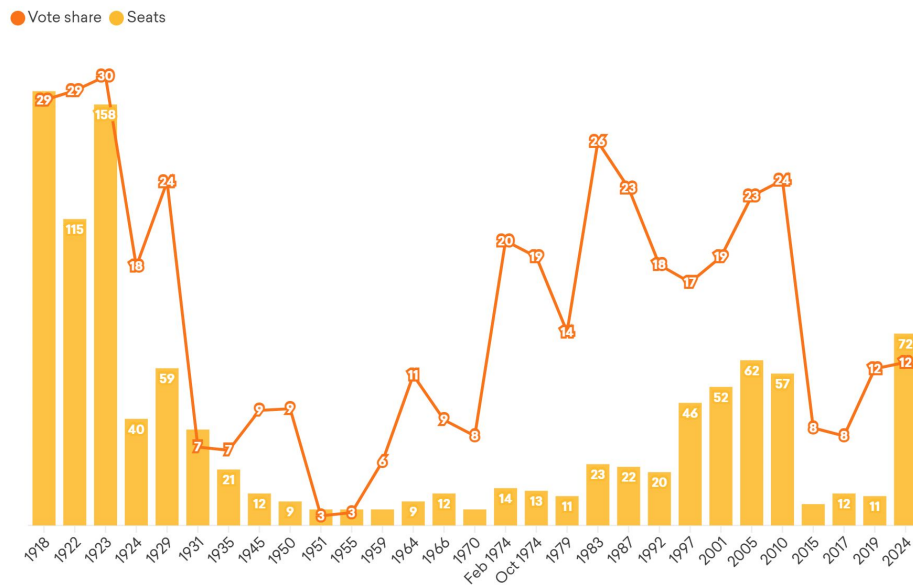
This means Liberal Democrat support is deep but narrow.

Where the Liberal Democrats did well in 2024, they have become entrenched, and many of those gains have remained in local elections. In many areas, this entrenchment has brought about a realignment in former Conservative homelands: in South London, the Conservatives went from holding both constituency seats in Sutton to losing every single ward up for election, within the span of a 5 year period.

The downside is that the Liberal Democrats lack a wide national base to build from. Despite winning more seats than in 2010, the Liberal Democrats only won about half of the votes that they achieved in 2010.

2024 was a historic Liberal Democrat high in terms of seats, but modest in terms of votes

Liberal / Liberal-SDP Alliance/ Liberal Democrat seats (bars) and vote share (line), every UK general election 1918-2024



Ed Davey's popularity has been remarkably stable

Ed Davey remains an unknown quantity to much of the public.

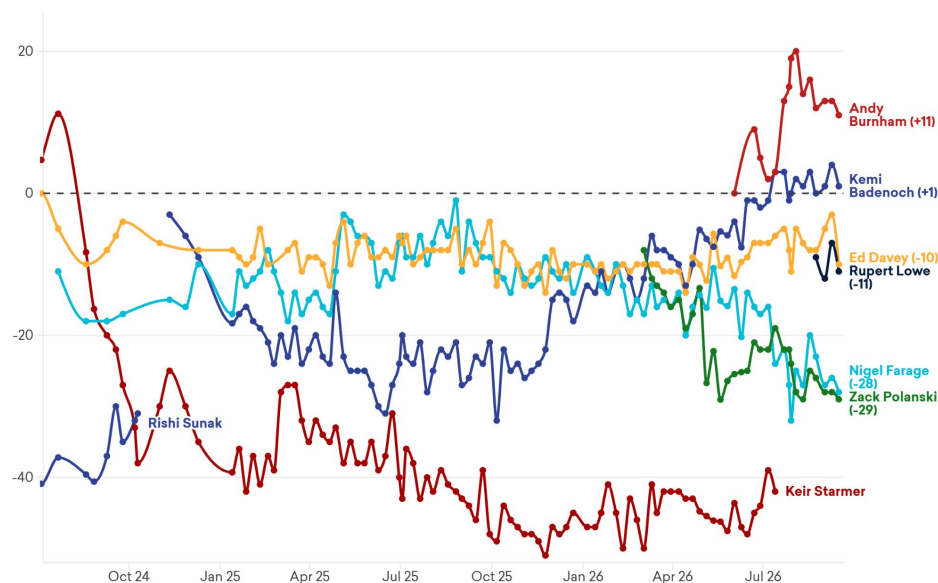
This parliament and the previous have seen popularity for leaders fluctuate rapidly and wildly. Ed Davey's own good job/bad job ratings have been remarkably static, ranging between +0 and -13 since the general election and rarely fluctuating.

The political landscape, however, has changed. **At times over the past year, Ed Davey was the least unpopular party leader.** Now, he is considerably less popular than Andy Burnham or Kemi Badenoch.

Leader approval ratings

Net approval rating

For each of the following, please indicate whether you think they are doing a good job or a bad job?



The challenge from the Conservatives and Labour is rising

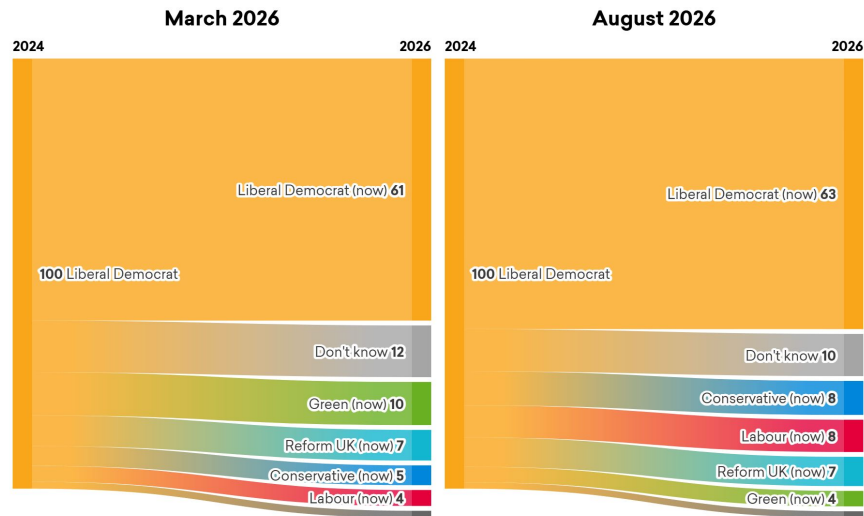
The Liberal Democrats have retained most of their 2024 voters since the general election, but nearly 2 in 5 have drifted away.

Liberal Democrat voters are moving in both directions. 14 per cent of Liberal Democrat voters are moving towards right wing parties (Conservatives or Reform), compared to 12 per cent moving towards left wing parties (Labour and the Greens). There has been a notable fall since March in the number going to the Greens, down from 10 per cent to 4 per cent.

A tenth of those who voted Liberal Democrat in 2024 do not know who they will now vote for.

The Liberal Democrats have cut the number of Green defectors, but Labour and Conservative defectors are rising

Where 2024 Lib Dem voters say they'd vote now, March vs August 2026



The popularity of Andy Burnham presents a challenge for the Liberal Democrats

Both 2024 and current Liberal Democrat voters hold positive views of Andy Burnham

While the Liberal Democrats may have been able to hold onto much of their vote before May on the grounds of Keir Starmer's unpopularity with the public, without a clearer national brand for the party there is a risk that this no longer holds true now that Andy Burnham is a more popular leader

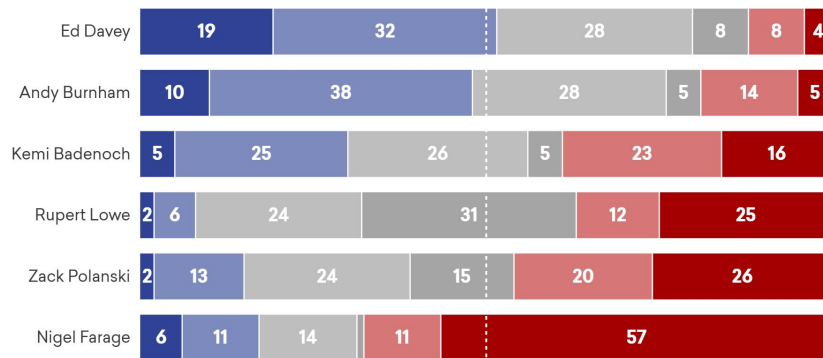
While attitudes toward Kemi Badenoch are more mixed, around 30 per cent of Liberal Democrats feel positively toward her.

2024 Liberal Democrat voters like Ed Davey and Andy Burnham - and overwhelmingly dislike Nigel Farage

For each of the following, please indicate whether you think they are doing a good job or a bad job?

[2024 Liberal Democrat voters only]

● Very good job ● Somewhat good job ● Neither a good job nor a bad job
● Don't know ● Somewhat bad job ● Very bad job



Liberal Democrats do better in older, less deprived and more educated areas

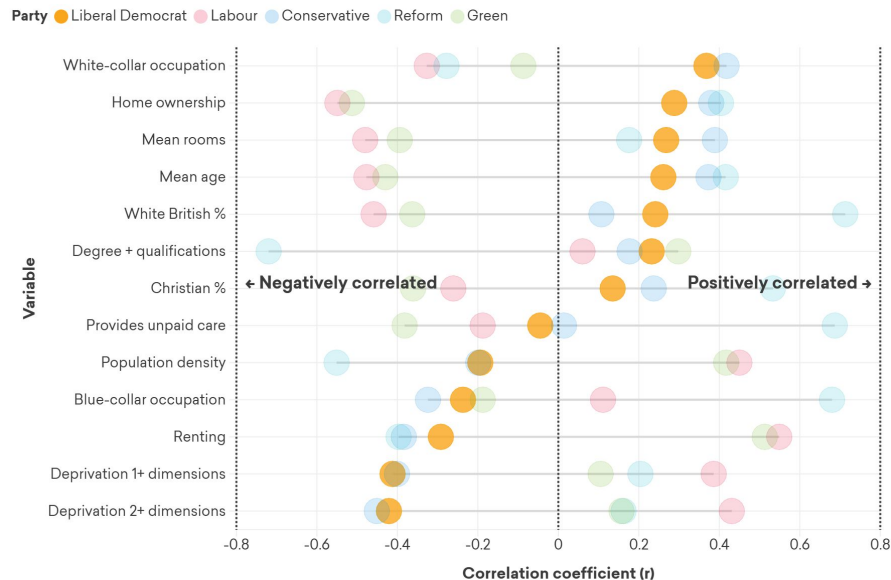
Local election results on a ward level show that on some metrics, Liberal Democrat support looks similar to Labour, and on others, it looks similar to the Conservatives.

Liberal Democrat support, at a local level, is higher in areas with more white-collar professionals, graduates and homeowners, and lower in deprived areas and areas with renters and blue-collar workers.

Liberal Democrats did roughly three times better in the least deprived areas than in the most deprived areas at the local elections, and five times better at the general election. They also skew whiter and more elderly than other progressive parties, and their support profile looks similar, in many ways, to the Conservatives'.

The Liberal Democrats skew older, wealthier, whiter, and more educated than the other parties

Correlation of ward-level census variables with 2026 local election vote share, by party



Liberal Democrats are close to median voters on the economy

The Liberal Democrats are close to the median voter on many crucial economic issues.

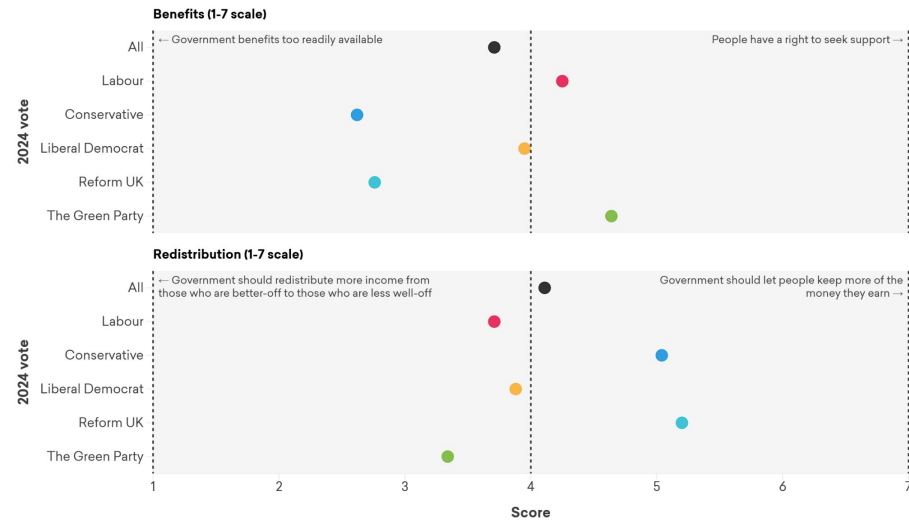
Liberal Democrat voters are slightly more left-leaning on benefits and redistribution, split evenly on whether benefits are too readily available, and closer to Labour on whether wealth should be redistributed from the better off to the less well off.

However, Liberal Democrat voters are the most likely of any voter group to say pension spending isn't sustainable, and believe current levels of government spending are not sustainable.

Liberal Democrats are close to the median voter on benefits and redistribution

Which of the following comes closest to your view? [Place yourself on the 1-7 scale]

2024 Vote ● All ● Labour ● Conservative ● Liberal Democrat ● Reform UK ● The Green Party



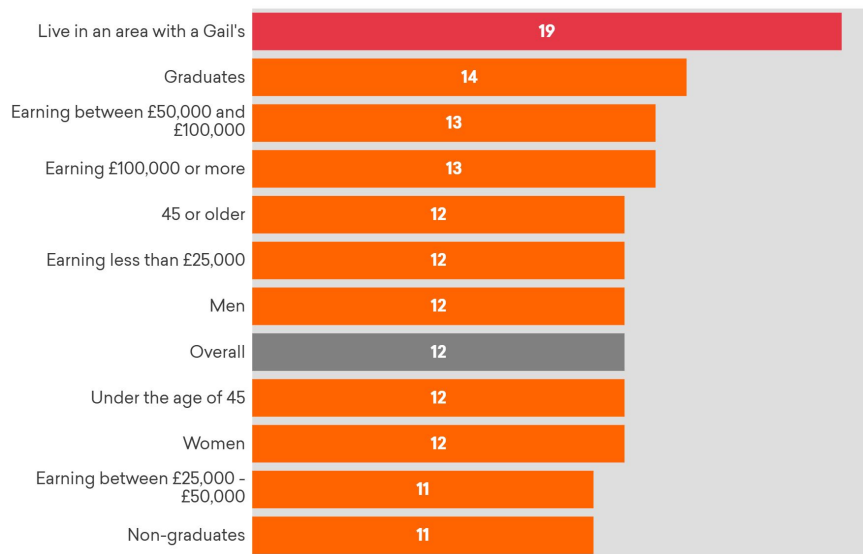
The 'Gail's Approach' has produced results

Liberal Democrat support is 19 per cent among Britons who live in an area with a Gail's Bakery, compared with 12 per cent overall – making the presence of the bakery on their high street a stronger predictor of an individual's likelihood of voting Liberal Democrat than most standard demographic measures, including having a degree (14 per cent) or earning over £50,000 a year (13 per cent).

This points to how the Liberal Democrats have broken through in more affluent parts of the country, but their highly localised approach to campaigning is not working in less affluent areas. This risks placing a limit on the party's growth: support for the Liberal Democrats is strongly negatively correlated with deprivation.

Living near a Gail's is a stronger predictor of Liberal Democrat support than most demographic factors

Liberal Democrat support across different groups, percentage



Tactical voting could boost or squeeze the Liberal Democrats

The state of the left in Britain at the next election will likely be defined by **tactical voting**: majorities of Liberal Democrat, Labour and Green voters say they would vote **against Reform** given the choice.

This could either help or hinder the Liberal Democrats: 77 per cent of Labour voters, 72 per cent of Green voters, and nearly half of Conservative voters are open to voting Liberal Democrats in some circumstances. This may help consolidate progress the Liberal Democrats made in tight contests with Reform; however, most Liberal Democrat voters would vote for other parties, meaning their support could be squeezed if Labour and the Greens are vying for the tactical progressive option.

We saw this in Makerfield and Gorton and Denton, where the Liberal Democrats lost their deposit as voters rallied behind another tactical choice.



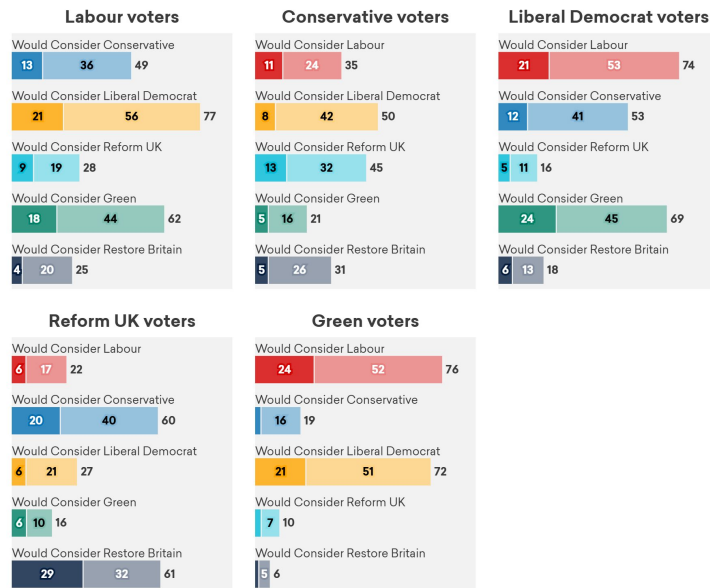
Lib Dems are nowhere. Greens are nowhere. So I think it's between Andy Burnham and Rob Kenyon.

Daniel, Marketing Manager, Makerfield

Labour, Green and Liberal Democrat voters are more willing to vote tactically for each other

To what extent, if at all, would you consider voting tactically for each of the following parties if you thought your first preference party could not win in your constituency?

By current vote. Dark colour= strongly consider, light colour= consider in some circumstances



Does Scotland show a path forward for the Liberal Democrats?

The 2026 Holyrood elections saw the Scottish Liberal Democrats manage to buck the recent trend for the Liberal Democrats.

They enjoyed vote share increases across the board – both where they were strong in 2021 and where they were weak.

While this was more pronounced in areas that voted No, the increase in vote shares extended into areas that voted Yes as well. It also extended into the Regional List vote shares as well – demonstrating this wasn't only an artifact of the Greens' decision to stand down in many constituencies.

The Scottish Liberal Democrats surged where they were strong and built foundations in areas where they were weak. In England, the Liberal Democrats have achieved the former but are still waiting to achieve the latter.

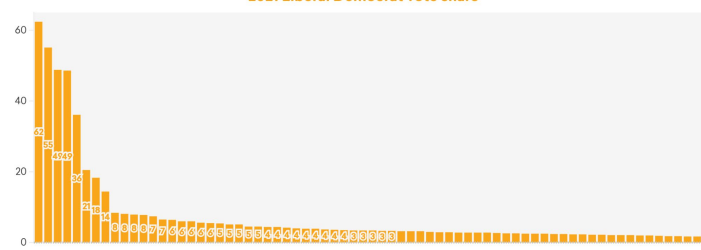
In 2026, The Liberal Democrats increased their vote share in almost every Scottish constituency – both in areas of previous strength and weakness

Liberal Democrat vote share, by Scottish Parliament constituencies

Increase in Liberal Democrat vote share in 2026



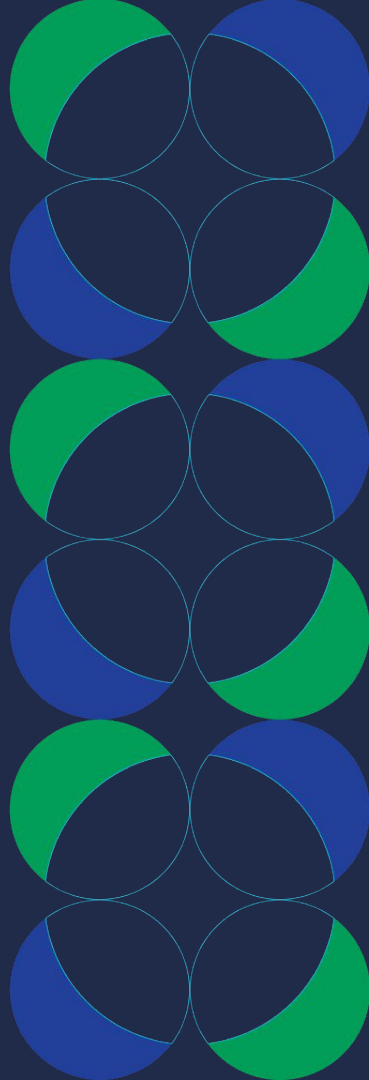
2021 Liberal Democrat vote share





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Challenges facing the Liberal Democrats



The challenge of cutting through

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The Liberal Democrats are facing a fundamental challenge of cut-through

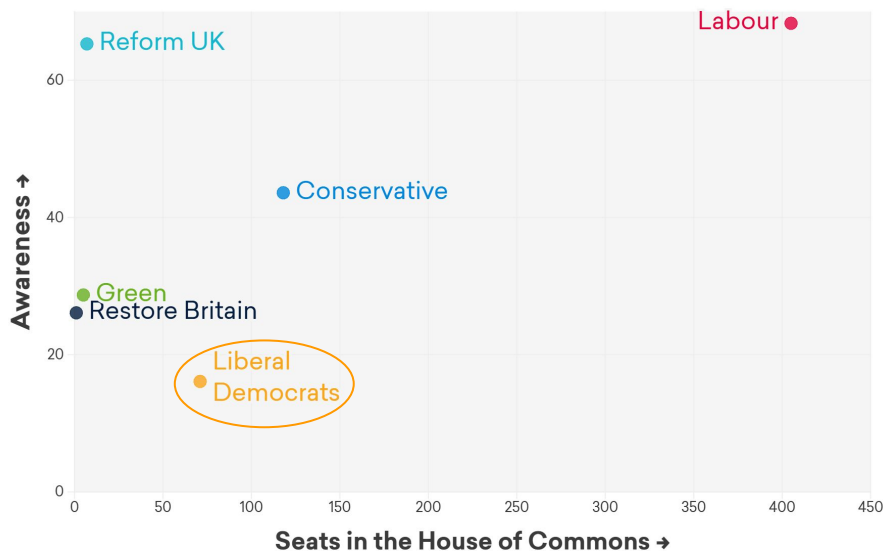
The Liberal Democrats hold 71 seats, nine times as many as Reform UK. And yet...

- Britons are four times more likely to have heard from Reform than the Liberal Democrats in recent months (66 per cent versus 16 per cent).
- Britons are nearly seven times more likely to have seen Nigel Farage on social media than Ed Davey (20 per cent to 3 per cent).
- Britons have heard more from Restore Britain than the Liberal Democrats in recent months.

This may have real electoral consequences – 26 per cent of those considering voting for the Liberal Democrats said that uncertainty over what the party stood for was a major barrier.

The Liberal Democrats are punching below their parliamentary weight in terms of cut-through

How much have you heard from each party in the past few months?
Percent answering "a great deal" or a "fair amount"

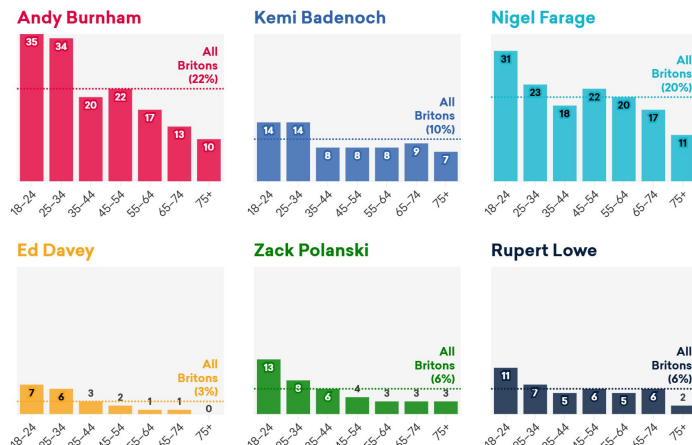


Where are the Liberal Democrats?

Only 3 per cent of Britons saw Ed Davey on social media last week – far lower than Andy Burnham (22 per cent) or Nigel Farage (20 per cent), and behind Kemi Badenoch (10 per cent), Zack Polanski or Rupert Lowe (both 6 per cent).

Only 3 per cent of Britons saw Ed Davey on social media last week - fewer than any other party leader

In the past week, which of these political figures have you seen content from on social media?
(By age)



 More in
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Source: More in Common • September 11-15 2026

I think my algorithm has decided that I don't need Ed Davey in my life because he just has not come across my screens at all. The name is familiar, but other than that, he has not penetrated my algorithm at all.

Hannah, security advisor, Bermondsey

All I've seen myself is that they're just a very, very small party in terms of the seats that they've got. I think after they've done their coalition, their reputation has been shot and it's never really recovered."

Ryan, telecoms manager, Surrey Quays

I don't think that they're, for me personally, very visible as a party.

John, Police officer, North East Hampshire

The Liberal Democrats may have a brand problem

Asked to describe the Liberal Democrats or Ed Davey in a word, the results are not as hostile as other parties, but overwhelmingly ambivalent or undefined: “don’t know” ranks first, followed by “boring” and “irrelevant” –

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



In a word or two, how would you describe the Liberal Democrats?



Ed Davey is seen as likeable, but awareness is low, and few see him as competent or in control

Among those who are aware of Ed Davey, attitudes are **relatively warm** – but awareness is **extremely low** and, across many attributes tested, “don’t know” is the top response.

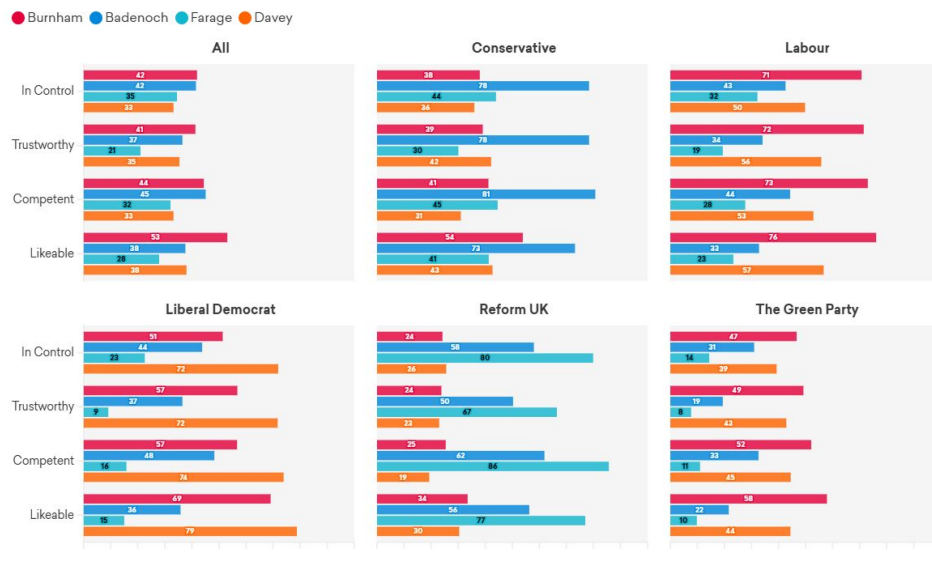
Ed Davey has some crossover appeal on the left – majority of Labour voters, for example, see him as likeable, trustworthy and competent. 2024 Green voters are almost as warm toward Davey as they are toward Burnham.

While those who know Davey see him as fairly likeable and trustworthy, he performs worse on competence and being ‘in control’ – particularly among those who voted Conservative in 2024. On these measures, he ties Nigel Farage at the bottom of the table.

Davey has high likeability scores, but struggles to be seen as in control or competent

Thinking about [leader name], would you say he/she is...

By 2024 vote





An unclear brand

Many see Liberal Democrats as local champions – but often feel they lack a clear national vision

Liberal Democrats do significantly better among voters who say they vote primarily on local issues. Among those who say that they mainly vote on national issues, the Liberal Democrats win 10 per cent of the vote; this rises to 17 per cent among those who mainly vote on local issues. They are the only party where this increases.

However, a local-only strategy has limits. Fewer than a third of voters (29 per cent) say they mostly vote on local issues, while 54 per cent vote on national issues. And those who do vote on local issues tend to be more affluent and match the demographic profile of the Liberal Democrats' base.

A clearer national mission may also be needed to broaden the Liberal Democrats' appeal.

The Liberal Democrats overperform among those who vote on local issues

Which of the following is more important when deciding who you are going to vote for at a General Election...?

(Change from overall national vote share)

● Conservative ● Labour ● Liberal Democrat ● Reform UK ● Restore Britain ● The Green Party ● Other/Independent



I think they're really present. I think they're the only party I can think of that put a manifesto through the door. I have a sense of who our councillors are. I think it's that presence, but I couldn't tell you who the Lib Dem national leader is, for example, and I don't see much. So I think they've got it on a fairly good local level, but not more broadly.

Ross, charity officer, Bermondsey

The public are not sure what the Liberal Democrats stand for

Under 4 in 10 (38 per cent) say they know what the Liberal Democrats stand for, with 61 per cent saying they do not.

More Britons say they know what Restore Britain stand for than the Liberal Democrats (47 per cent to 39 per cent).

Among those who are considering voting for the Liberal Democrats, three in ten (29 per cent) are unclear about what the party stands for.



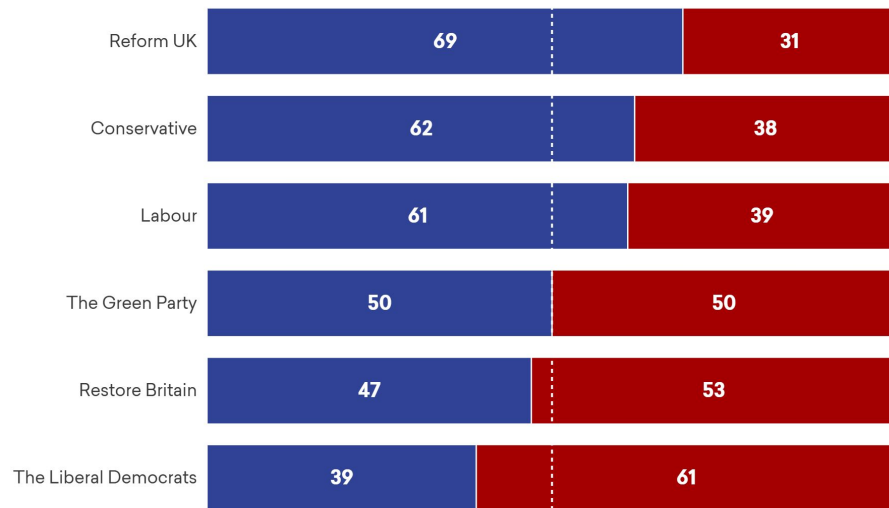
They are a branded party. Everyone knows who they are, but no one knows what they stand for.

Ryan, telecomms manager, Bermondsey

Fewer people know what the Liberal Democrats stand for than any other party

For each of these political parties, would you broadly say that...?

● I know what this party stands for ● I don't know what this party stands for



The Liberal Democrats don't 'own' any one issue

The public are also unsure what the Liberal Democrats prioritise.

When asked what they think the Liberal Democrats find important, "Don't know" tops the answers at 32 per cent, including 12 per cent of current Liberal Democrat voters and 20 per cent of those considering voting for the party. EU relations is second (23 per cent), followed by Cost of Living (17 per cent) and the NHS (17 per cent).

Liberal Democrat supporters are most likely to name the NHS as an issue important to the party. While social care does not rank highly on the list, Liberal Democrat voters themselves often cite Ed Davey's focus on social care in focus groups as something that helps the party stand out.



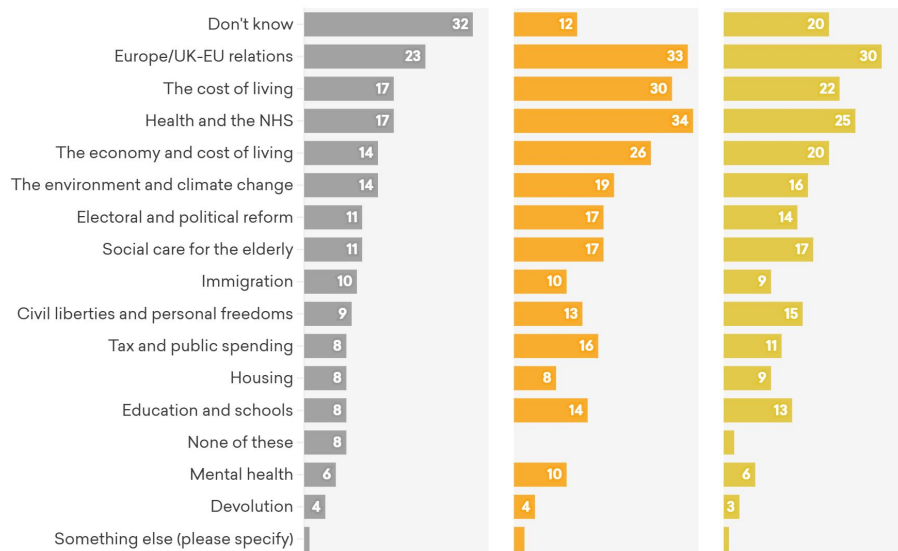
I don't remember hearing anything. Ed Davey, I don't remember hearing anything for ages. When I think of him, all I think of him as, because he's got a child with disabilities, that he's very focused on caring and the care system and supporting carers, which I think so many people care about. (...) So I think that would touch hearts."

Sandra, retired, North East Hampshire

Liberal Democrat voters see the NHS and Europe as the party's top issues

Which issues are currently most important to the Liberal Democrats? (select up to 3)

● All ● Current Liberal Democrat supporters ● Liberal Democrat considerers



Concerns about electability and clarity are the Liberal Democrats' biggest barriers

Lack of clarity over Liberal Democrat policy is the second largest barrier, but the largest remains electability. A belief that the Liberal Democrats can't win ranks top (24 per cent), and is higher among those currently considering voting Liberal Democrat, but not yet doing so (35 per cent).

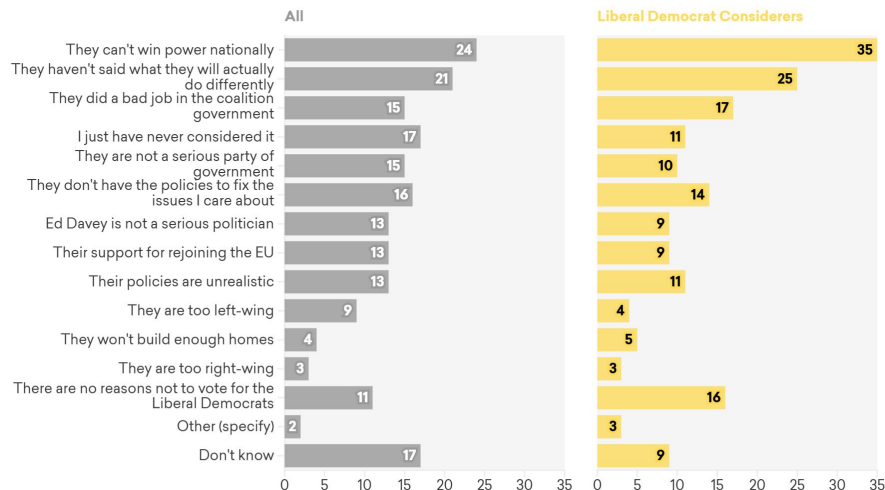
Other causes are more mixed. "They haven't said what they'll do differently" comes second across both categories. Liberal Democrat considerers rank the previous coalition as the third most important reason why they are hesitating, although it only ranks #6 among the general public.

Notably, only around 7 per cent of those considering voting Liberal Democrat name 'too left wing' or 'too right wing', challenging the idea that winning voters is simply a matter of picking between left and right.

A sense that the Liberal Democrats can't win - and uncertainty over what they stand for - are top barriers to voting Liberal Democrat

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

By current voting intention



Voters don't think that the Liberal Democrats represent change

Only 21 per cent of Britons think the Liberal Democrats represent change; 55 per cent say they represent more of the same.

In contrast, pluralities consider Reform UK (49 per cent) and the Green Party (39 per cent) to represent change.

While the Liberal Democrats may once have been a strong contender as a 'none of the above' option for parties fed up with the status quo, they are now competing with insurgent parties on left and right.

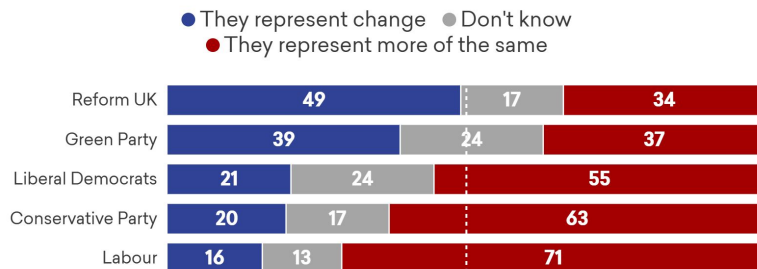


I'm not sure that a vote for the Lib Dems would make a huge change. I could be swayed on that, but I think they have to be more charismatic and a bit more fearless and get out there and just make some policies that people actually want to hear and get in people's faces. But I think possibly Labour would be the vote.

Hannah, security advisor, Bermondsey

Reform and the Greens are seen as change — the Lib Dems are more of the same

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



Liberal Democrats cannot rely on incumbency

Incumbency cannot save the Liberal Democrats from the effects of a generalised national collapse.

In 2015, polling had indicated on a local level that the Liberal Democrats could hold 20–30 seats of their 57 seats on the strength of their national brand, with hopes Labour tactical voting could save West country seats against the Conservatives.

This did not happen. The Liberal Democrat vote share sunk 16 points in their own seats, and the Liberal Democrats lost 49 seats out of their 57.

In More in Common's July MRP, Liberal Democrat vote share was forecast to go down by 8 points in seats they hold.

Incumbency did not save the LDs from their 2015 collapse

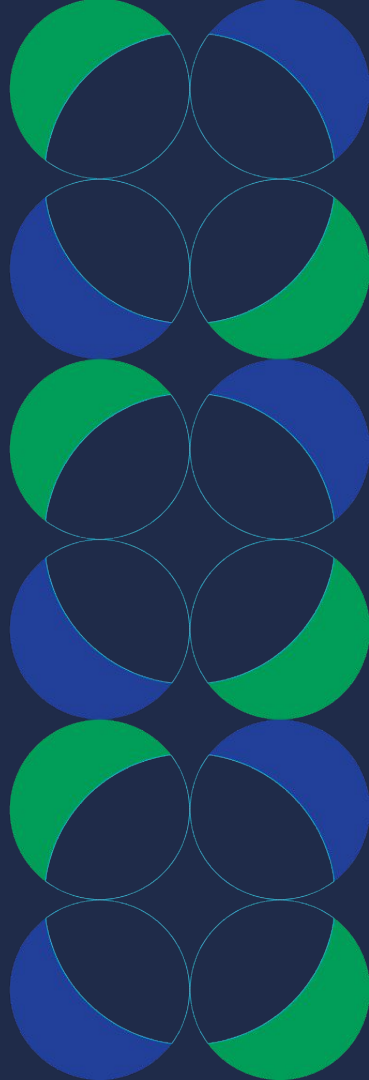
Average vote share, 2010 vs 2015, in seats Lib Dem held after 2010 vs seats they didn't





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Case study: Bermondsey and Old Southwark



The Liberal Democrats perform well where they are locally rooted

Long-standing residents of Bermondsey often credit the reputation of Simon Hughes – the party's MP for the seat for 32 years until 2015 – as a key reason they have voted for the party over the years. Their perceived continued strong record locally is a key reason why many still back the party.



To be fair, I voted Liberal Democrat for many years, mainly just because of Simon Hughes. That's literally the only reason I ever voted Liberal Democrat.

Ryan, telecoms manager, Bermondsey



I tend to vote Lib Dem, mainly because I personally prefer Lib Dem MPs to Labour. And I think since we've lost Simon Hughes and gained Neil Coyle, there's been a difference in the borough in terms of his presence and what he does for the area.

Feyi, IT specialist, Bermondsey



I think because they have been doing really well, as in the Lib Dems have been doing really well in a local sense, I'm very inclined to vote for them, if I'm honest.

Sadie, social worker, Bermondsey

But voters had no impression of the party nationally

While voters in Bermondsey showed remarkable awareness of their former local MP's record, few felt they knew anything about the party on a national scale.



I think decades ago they had presence, and they were, in my mind, the third option: you'd be voting Labour or Conservative, and if you weren't, you'd probably vote Lib Dem. Now I think they're fifth option probably.

Ross, charity officer, Bermondsey



Rejoining the EU is the only thing I can think of.

Feyi, IT specialist, Bermondsey



With Labour and Conservative, their last manifesto was something that everyone was talking about... But with the Lib Dems, I don't remember seeing them on a national level. On a local level, yes. But on a national level, I don't remember seeing a lot about their campaign or anything like that.

Sadie, social worker, Bermondsey

And some have doubts that the Liberal Democrats can tackle the problems locally without a national mission

Bermondsey has areas of great deprivation – which correlates negatively with Liberal Democrat support. Some focus group participants pointed at some of the issues facing the local area – gentrification, public services – and feel that there needs to be significant national change to address them.



The issue that I have is the lack of things for young people to do... there was a lot of children just hanging around and smoking, teenagers smoking weed, doing nothing for the whole summer. There's nothing for these kids to do. There's the one youth centre in the whole area.

Sadie, social worker, Bermondsey



So they do have an opportunity for change, and parties like Reform have literally just walked in and taken the space that was available for them to take.

Ryan, telecoms manager, Bermondsey



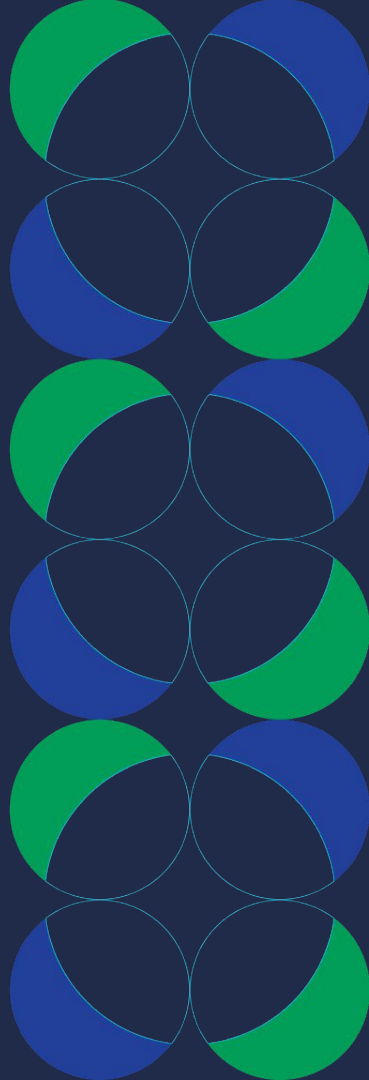
We are being priced out. If I move house, I'm definitely not going to be moving to another house in Bermondsey... we have been done a little bit by the quality of our schools.

Ryan, telecoms manager, Bermondsey



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Case study: North East Hampshire



Many were disillusioned with the Conservatives in 2024, but also distrust Labour

In the Blue Wall, many former Conservative voters describe choosing the Liberal Democrats because they felt disillusioned with the Conservative government but did not want to place their trust in Labour. For them, the Liberal Democrats were a sensible third option.

These centre-right voters often speak positively about the 2010–2015 coalition, are critical of Labour's economic offer, but felt let down by the Conservatives in recent years.

Many say they would be open to voting Conservative again.



Views aside on Rishi Sunak, he was a businessman (....) he might be a bit dodgy, but at least he knew what he was doing with the finances in some regards because he's worked in that world. So you had some confidence in that. But then we get Liz Truss, and it was like, 'Okay.'

Rob, logistics manager, North East Hampshire



I think I look back and I have no bad memories of (the coalition)... that period felt quite stable in retrospect.

Sandra, retired, North East Hampshire



It was close enough to remember the last Labour government, and I think that maybe there was an element of, 'Well, I don't want Conservatives, but I also remember that, and I'm not keen on that either, so what have I got left?'

John, police officer, North East Hampshire

Many like Kemi Badenoch, and would consider returning to the Conservatives

Several who had switched away from the Conservatives in 2024 spoke warmly about Kemi Badenoch specifically, describing her as more impressive than the current government, and some said they were already drifting back to the party.

While Ed Davey is more popular than Badenoch among most Liberal Democrats, 'Blue Wall' Established Liberals prefer Badenoch.

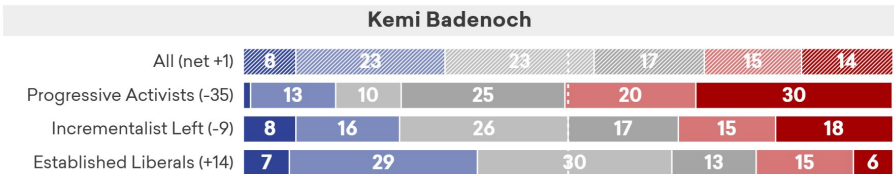
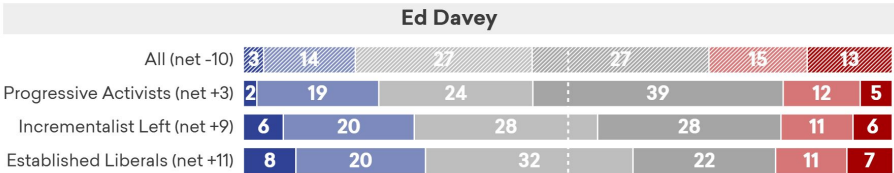
 *She feels like a breath of fresh air. I'm not saying that means necessarily that I would vote Conservative, but the way she presents herself online, in interviews, in the house when she's doing Question Time each week and PM's Questions... she presents herself really well, and her arguments sometimes are really strong (...) At the moment, I feel like I'm personally swinging back to being a conservative voter again... I feel like they have a plan to make real change.*

John, police officer, North East Hampshire

Ed Davey is relatively popular across Liberal Democrat target segments - but Badenoch is more popular among Established Liberals

For each of the following, please indicate whether you think they are doing a good job or a bad job?

- Very good job ● Somewhat good job ● Neither a good job nor a bad job
● Don't know ● Somewhat bad job ● Very bad job



In the Blue Wall, many want to see a centre-right opposition

Many Blue Wall voters want something different from a party like the Liberal Democrats – not a centre-left party but a moderate centre-right opposition. Some describe a feeling of being bruised by the past two budgets, and wanting a party of fiscal responsibility.



I think that's the challenge though, isn't it? Labour have always had the glorious policies. I remember back in the day it was free wifi for everyone, and that's going to get you the votes. But if they're gripping an issue and it's not a glamorous policy statement, it might not necessarily grab the headlines, but it might show they've got a better understanding of what needs to change... if this is something they've actually looked at in detail, thought about, and they've got a plan to go and change something, then that's good. I think that's something we'd probably need

Rob, logistics manager, North East Hampshire



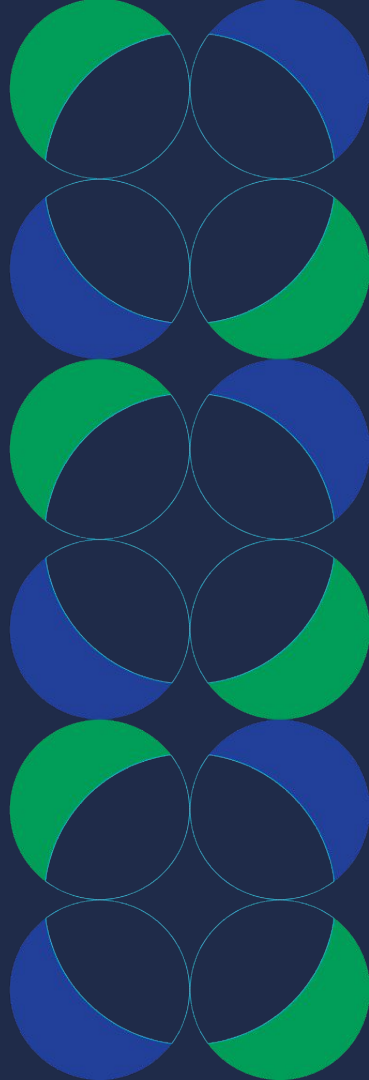
Labour are just taxing everyone, whether it be the people earning loads or some of us on what we would consider to be a good to moderate wage... well, at least I know with the conservatives, potentially that's not going to be the case.

Rob, logistics manager, North East Hampshire



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Paths to 2029



The Liberal Democrats' main battleground is with the Conservatives, not Labour

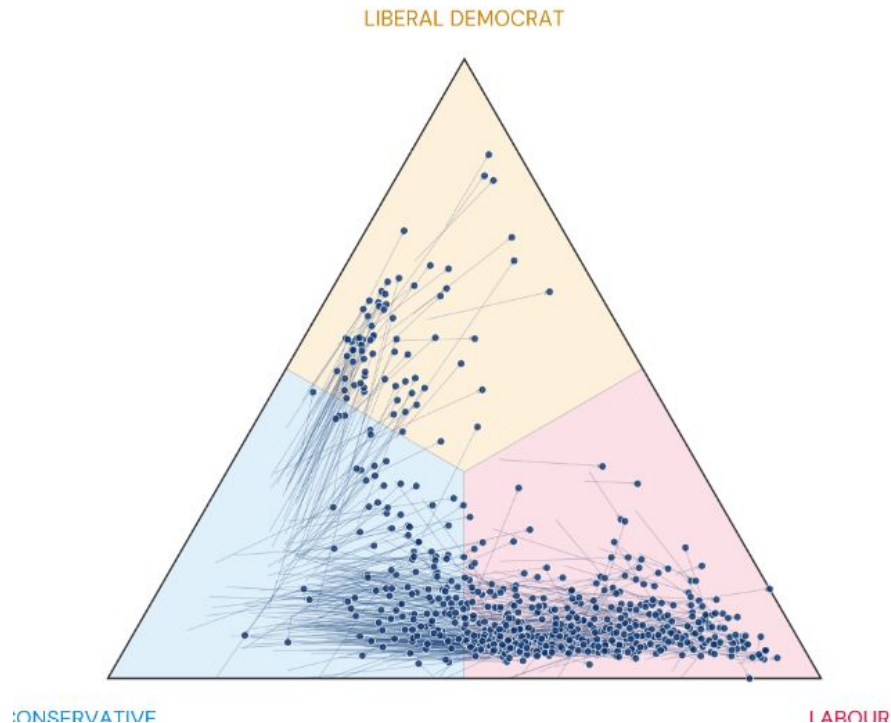
Liberal Democrat seats in 2024 (shown in the top triangle), tended to be won from the Conservatives. By contrast, there are almost no areas of battleground with Labour (the space between the yellow and the red), with little vulnerability but little room to grow.

This makes it comparatively much more difficult to exploit an unpopular Labour government than it was to exploit Conservative unpopularity.

The Liberal Democrats do not have a substantial battleground with the Labour Party. Of their top 50 target seats, just 11 are held by Labour, compared to 38 by the Conservatives and 1 by the SNP. The same goes with seat defences.

A paradigm shift is needed to get the Liberal Democrats beyond capturing the remnants of winnable Conservative seats. Conversely, a Conservative recovery would quickly put scores of Liberal Democrat seats back in danger.

Conservative, Labour and Lib Dem relative vote share: 2019 to 2024



Liberal Democrats have more to gain, and lose, from the Conservatives

The most direct path to Liberal Democrat growth runs through the Conservatives: of their top 50 target seats, just 11 are held by Labour, compared to 38 by the Conservatives and 1 by the SNP. It requires extremely large swings for the Liberal Democrats to start winning seats from Labour.

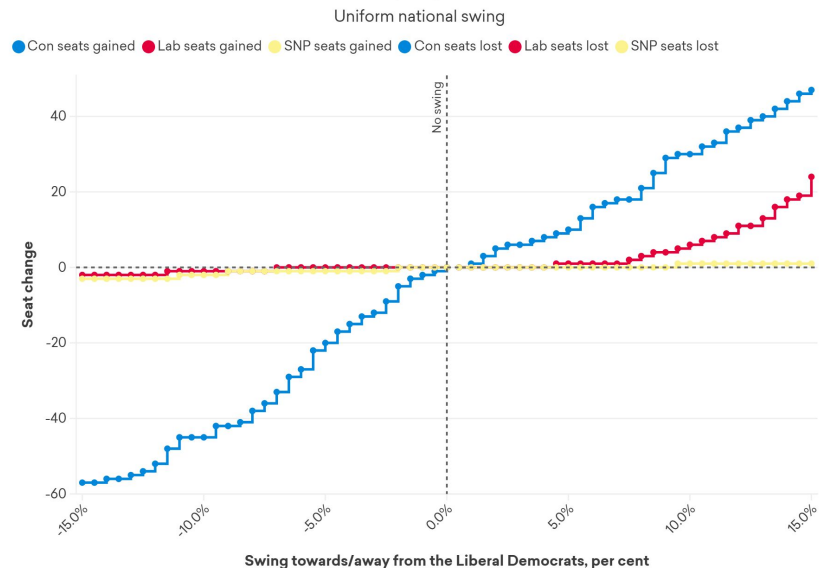
The same goes for defending their currently held seats: the Liberal Democrats are most vulnerable to the Conservatives. A 5-point swing against the Liberal Democrats to the Conservatives could cost the Liberal Democrats 20 seats, compared to 1 for the SNP and 0 for Labour.

This means that a 'safety first' approach to growth – defending their gain and targeting the most reachable seats – would primarily be aimed at the Conservatives and the Blue Wall.

To break through into Labour seats would require a more fundamental paradigm shift, and a far greater swing.

Liberal Democrats have more to lose to the Conservatives- and more to gain

Cumulative seats gained (right of 0%) or lost (left of 0%) at each swing, by opposing party



The public see a Labour–Liberal Democrat coalition as the lesser of evils

Voters are generally unenthusiased about the idea of a coalition; every outcome scores negatively.

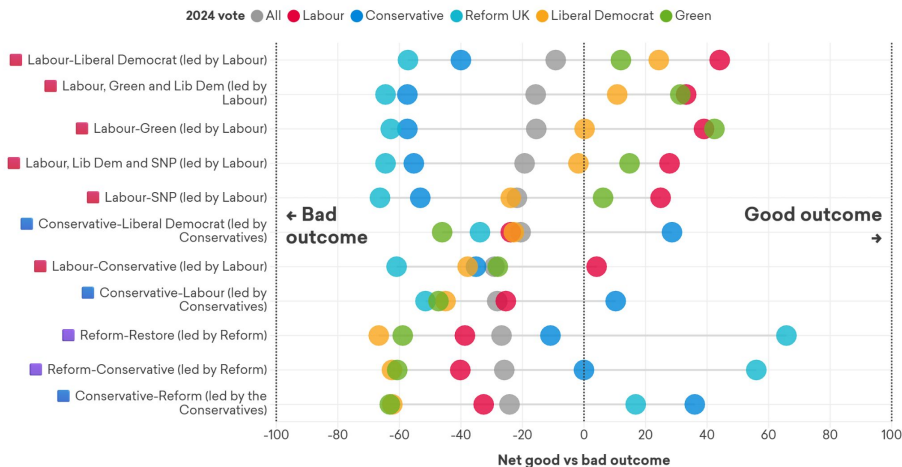
The least unpopular coalition idea across the general public is a Labour–Liberal Democrat coalition, which is supported by 29 per cent of Britons and opposed by 38 per cent.

Half of the Liberal Democrats' 2024 voters would be happy with a Labour–Liberal Democrat coalition, while 25 per cent would view it as a bad outcome.

Appetite for a repeat of the Conservative–Liberal Democrat coalition government is low, with only Conservative voters viewing it favourably. However, many of the Liberal Democrats' Established Liberal voters would approve.

A Labour–Liberal Democrat coalition is the least unpopular coalition - although it's deeply unpopular among Conservatives

After the next General Election, it is possible that no party will win enough seats to form a majority government, meaning the next government could be a coalition. For each of the following, please indicate whether you would find this a good or a bad outcome.



Coalitions would carry risks – and Liberal Democrats would want to see red lines

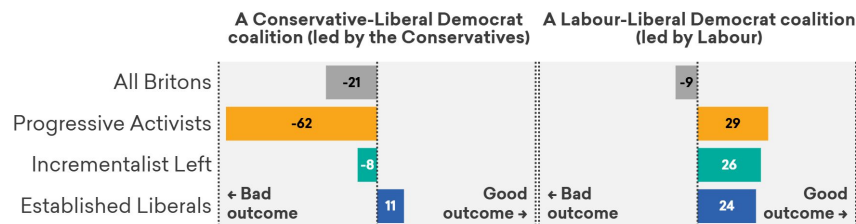
While a Labour–Liberal Democrat coalition would be popular among the Liberal Democrats’ progressive voters, it could limit their ceiling among former Conservative voters: only 18 per cent of those who backed the Conservatives in 2024 would be happy with a Labour–Liberal Democrat coalition, while 58 per cent would view it negatively.

A Conservative–Liberal Democrat coalition is more divisive: it could prove popular among the party’s Established Liberal voters – who are important in ‘Blue Wall’ Home Counties constituencies, and who in focus groups refer fondly to the coalition era; but it would push away many Incrementalist Left voters, and be deeply toxic to Progressive Activists – for whom the 2010–2015 coalition ranks as one of their top barriers to voting Liberal Democrat.

In focus groups, it’s clear that Liberal Democrat voters would like to see a set of clear red lines established before any conversation about coalitions – whether with Labour or the Conservatives.

Going into coalition with the Conservatives would be much more divisive than with Labour

For each of the following, please indicate whether you would find this a good or a bad outcome.



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(Net score - proportion who see each outcome as a positive outcome, minus those who say negative)



Obviously, I wouldn't want Lib Dems to make many concessions. There are some policies they're aligned on when it comes to the NHS. (...)As long as they've both got a joint, clear policy, [a coalition with Labour] could be positive.

Sarah, airline worker, North East Hampshire

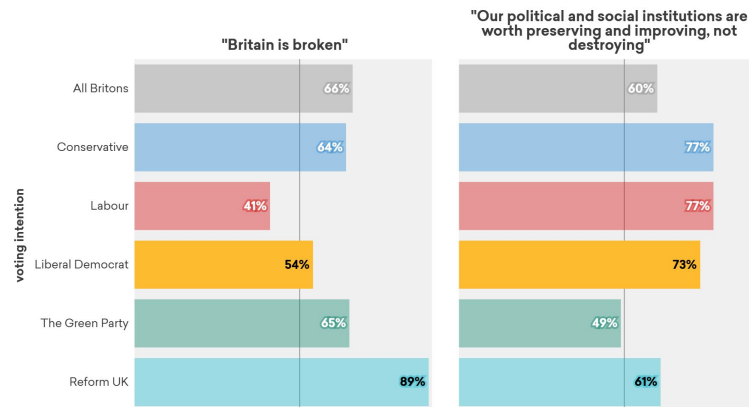
Most Liberal Democrat voters believe Britain is broken – but want realistic change

Liberal Democrat voters have a distinct theory of change: unlike most Labour voters, they believe that Britain is broken. But unlike most Green and Reform voters, they don't want to "burn down" the system and start again from scratch.

An offer of ambitious yet practical, gradual change would be likely to appeal to this voter group.

Most **Liberal Democrat** voters say Britain is broken – yet 3 in 4 believe our system is worth preserving

(Proportion who agree with each statement)



I think that's the challenge though, isn't it? Labour have always had the glorious policies. I remember back in the day it was free wifi for everyone, and that's going to get you the votes. But if they're gripping an issue and it's not a glamorous policy statement, it might not necessarily grab the headlines, but it might show they've got a better understanding of what needs to change... if this is something they've actually looked at in detail, thought about, and they've got a plan to go and change something, then that's good. I think that's something we'd probably need

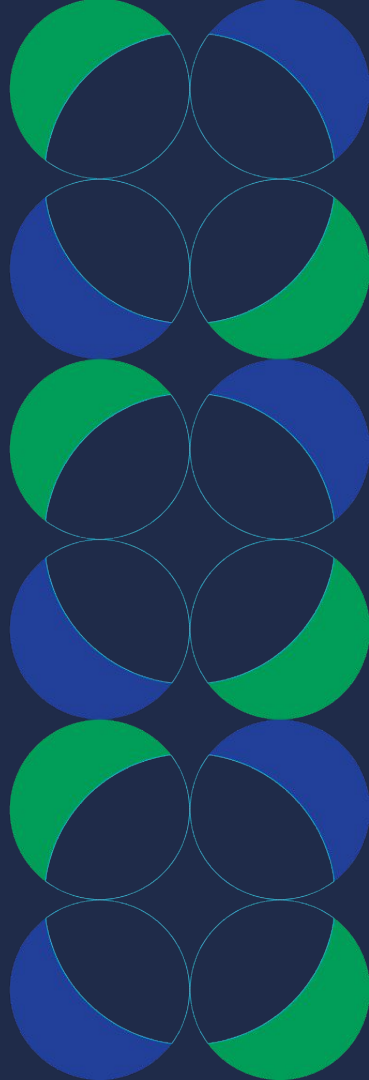
Rob, logistics manager, North East Hampshire



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Who and what are the Liberal Democrats for?

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Nature and Liberal Democrats - Growing the base



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Vickers**

The House
Magazine
(Chair)



**Alistair
Carmichael MP**

Chair of Environment,
Food and Rural Affairs
Committee



**Abigail
Bunker**

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Royle**

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