



Mood of the Nation

February 2025 Update

13.02.2025

Thinks
— Insight & Strategy —

Summary headlines

1

Net optimism for the UK dropped towards the end of 2024 and remains low today.

2

Reform are performing well but pose a greater threat to the Conservatives than to Labour.

3

2024 Labour voters are disappointed with what they have seen in the first six months, but unlike Conservative voters, the alternative is less clear.

4

But the majority think Labour still have (some) time to deliver their agenda.

We conducted a survey with the public and focus groups with 2024 Labour voters



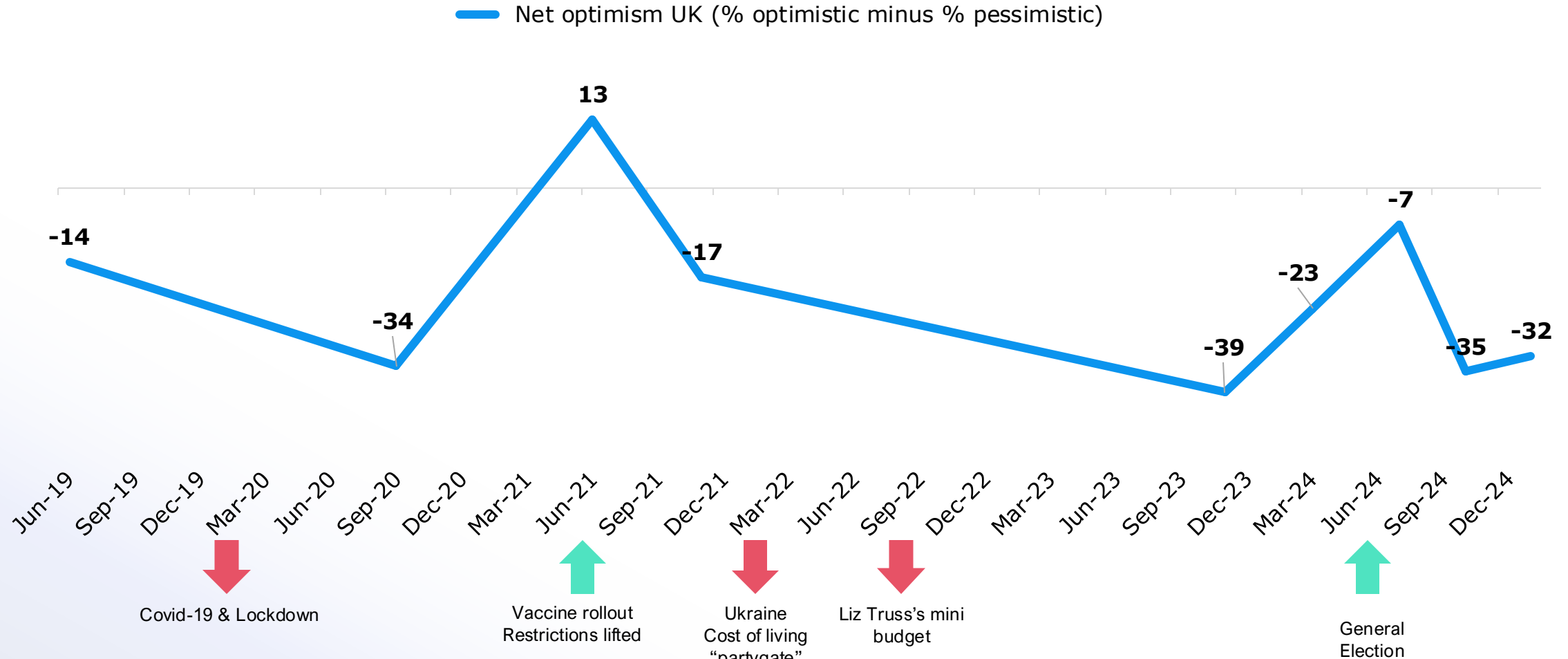
Nationally representative survey of 2,067 adults in the UK

29th-30th January 2025



2 online focus groups with Labour voters in seats that swung to Labour in 2024: Dudley, Halesowen, Bury North and Bury South

Following a post-election uptick, net optimism for the UK fell back by November 2024, and remains low today.



Q1. Thinking about the next year or so, how optimistic or pessimistic do you feel about each of the following? Base: All respondents (multiple samples of n>2000)

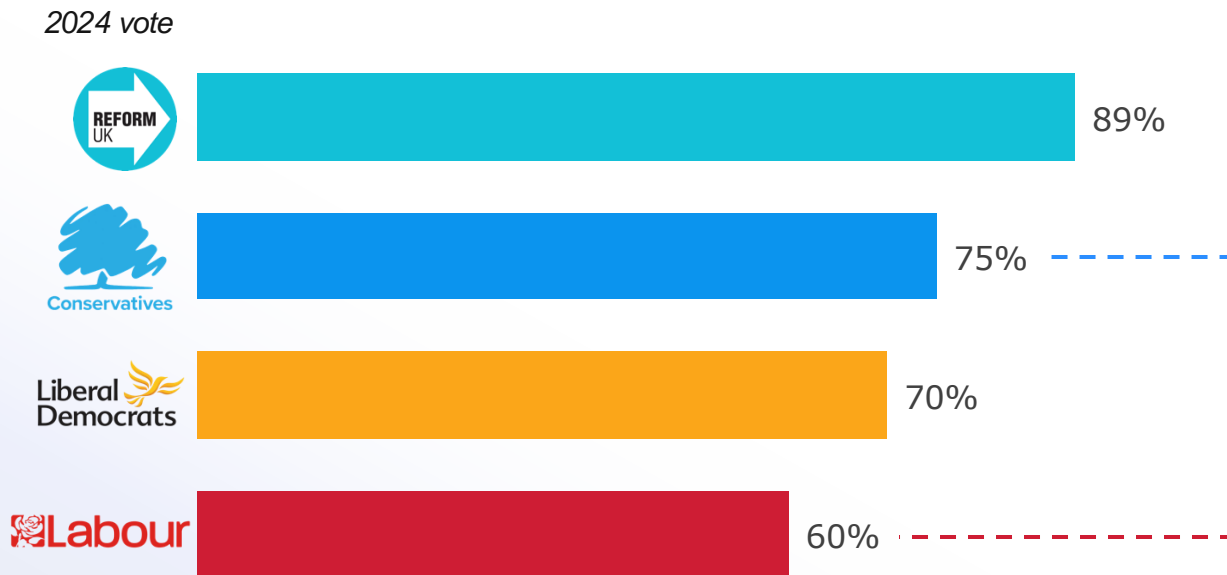
*NET optimism is % saying they feel optimistic minus those saying they feel pessimistic

PRIVATE AND CONFIDENTIAL

Given the chance to change, 89% of Reform voters would stick with their 2024 vote. Only 60% of Labour voters would do the same.

If you could go back in time to the General Election 2024 with the knowledge you have now, would you vote the same way again, or would you vote for a different party?

Showing % selecting "I would vote for the same party"



25% of 2024 Conservative voters would change their vote:

- 13% would switch to Reform
- 2% would switch to Labour
- 1% would switch to Lib Dem
- 8% now don't know / would not vote

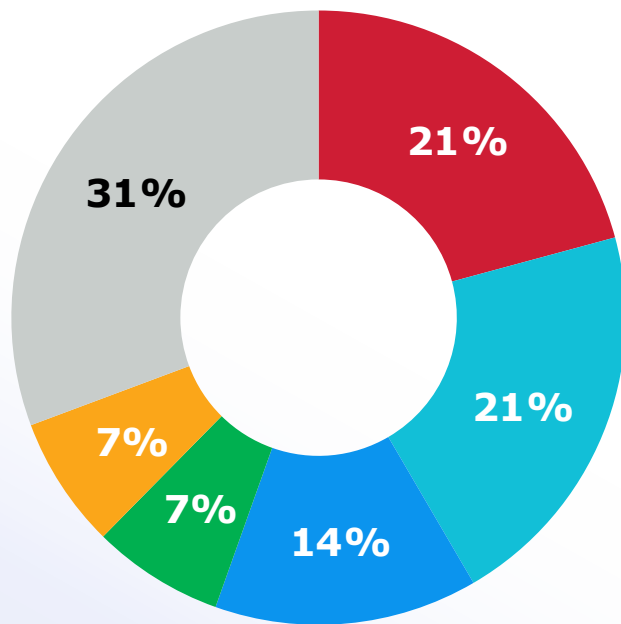
40% of 2024 Labour voters would change their vote:

- 16% now don't know / would not vote
- 6% would switch to Lib Dem
- 6% would switch to Reform
- 5% would switch to Green
- 5% would switch to Conservative

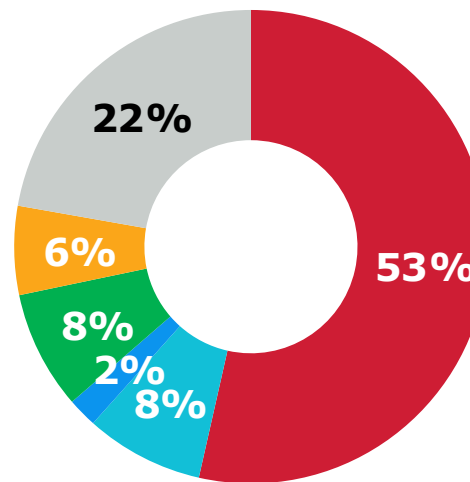
Labour and Reform are each seen as the most effective Government by 21% of UK Adults.

Regardless of the election result, which party do you think would be the most effective Government for the United Kingdom today?

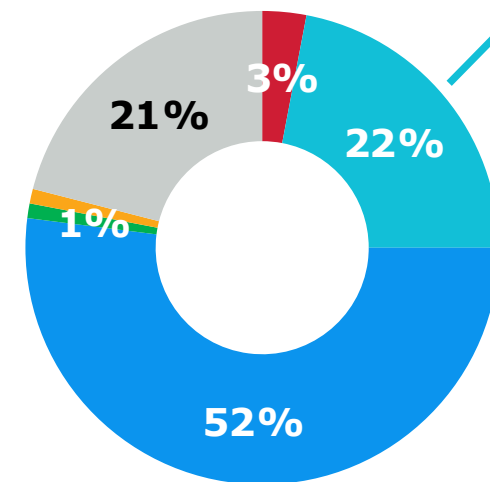
UK Adults



2024 Labour voters



2024 Conservative voters

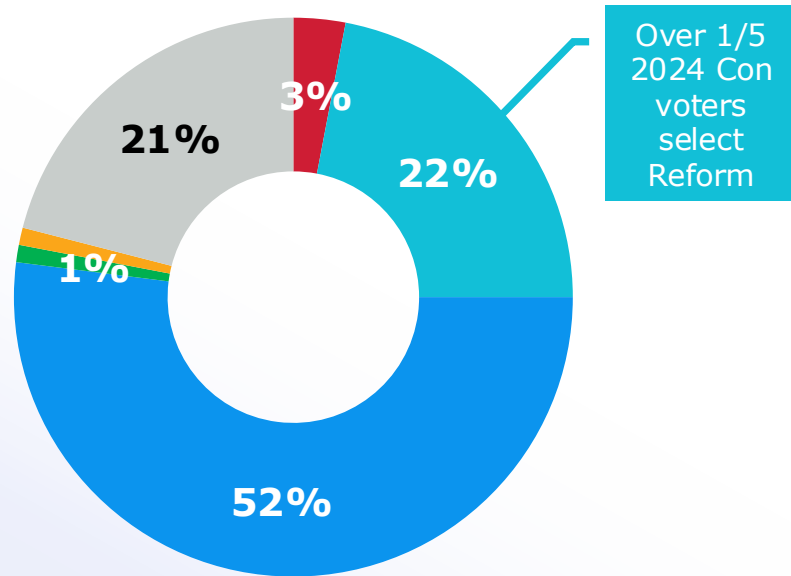


Over 1/5
2024 Con
voters
select
Reform

■ Labour ■ Reform UK ■ Conservatives ■ Greens ■ Lib Dems ■ Other/None/Don't know

More than a fifth of Conservative voters say that Reform UK would make the most effective government for the UK.

Regardless of the election result, which party do you think would be the most effective Government for the United Kingdom today?
(2024 Conservative voters)



■ Labour ■ Reform UK ■ Conservatives ■ Greens ■ Lib Dems ■ Other/None/Don't know

Qualitatively, we heard from voters that they see Reform as an attractive option for Conservative voters that are disappointed with the Tories, particularly over immigration.

While they wouldn't necessarily vote for Reform themselves, Labour voters told us that they'd expect Reform to perform very well if an election was held tomorrow.

"I think the most angry Conservative voters have moved over to Reform... especially over immigration problems."

22-35, Bury South

"I think the Tories would do a lot worse [if there was an election tomorrow], because a lot of their voters have gone to Reform. If there was an election tomorrow, Reform would do really well."

22-35, Dudley

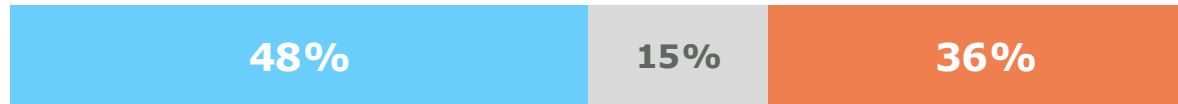
The expectation is that the Conservatives will be out of power for a while. Reform are expected to go from strength to strength.

I think the Conservative party are going to take more than one election to be competitive again



I think the Conservative Party will be back in the running by the next election

Reform UK, with Nigel Farage as its leader, is going to go from strength to strength



Reform UK have peaked at the last election and are unlikely to grow their support in future

33%

2024
CONSERVATIVE
VOTERS

AGREE: "Nigel Farage would make a good prime minister for the UK"
(28% of UK adults agree)

85%

2024
REFORM
VOTERS

45%

2024
CONSERVATIVE
VOTERS

AGREE: "I would like to see Conservatives and Reform UK join forces as a single party"
(23% of UK adults agree)

41%

2024
REFORM
VOTERS

Labour voters are disappointed with what they have seen so far. Just 3 in 5 say they would vote Labour again if they could go back.

In focus groups, voters explained that they opted for Labour because of an attractive manifesto that promised change. Six months in, they feel they have seen little sign of improvement.

Voters feel that Kier Starmer's government has been more similar to the Conservatives than anticipated. Many cite the changes to the Winter Fuel Payment as an example of a policy they didn't expect from a Labour government.

If you could go back in time to the General Election 2024 with the knowledge you have now, would you vote the same way again, or would you vote for a different party? (2024 Labour Voters)



“There was a hope that something was going to change. We waited so long... I feel disappointed because **it's been 6 months without an inkling of change.**”

45+, Dudley

“He might be a Labour leader, but **he's the most Tory labour leader we ever had.** He came into the power and took the heating allowance off pensioners.”

22-35, Dudley

Labour voters are less drawn to a specific competitor and a (small) majority still think Labour makes the most effective government.

The disappointment with the current government is leading some Labour voters to look elsewhere, but the alternative for them is less clear than it is for Conservative voters.

While some are considering Reform, the Green Party and/or the Liberal Democrats, most disillusioned Labour voters are unsure who they would vote for if they could go back in time.

“I think I would be more considerate to the other parties than I ever have been before...

Not sure Nigel Farage is enough to win my vote but it's definitely something I'd look at more now than I would have a year ago.”

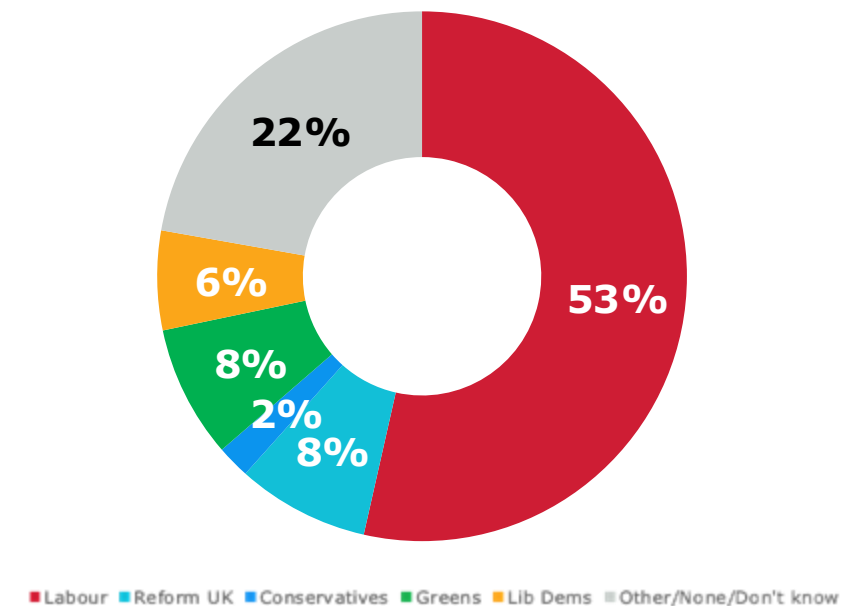
45+, Dudley

“I would never vote for them [Reform]. I've always been Labour but if there was vote tomorrow, I don't think I'd vote to be honest.”

22-35, Dudley

Regardless of the election result, which party do you think would be the most effective Government for the United Kingdom today?

(2024
Labour voters)



Q. Regardless of the election result, which party do you think would be the most effective Government for the United Kingdom today? Base January 2025: 2024 Labour voters (n=667).

Majorities still say Labour has (some) time to deliver on its agenda.

No matter how I feel about them the Labour government should, be given time to deliver on their agenda



I would prefer for this Labour Government to be replaced by a different party immediately

Even if this Government is effective, it will be a year or two after the election before we start seeing much improvement



If this Government is effective, I would expect to see real improvements in our country within a year of the election

The UK's current economic problems are mostly due to long-term issues that pre-date the current Labour government



The UK's current economic problems are mostly this Labour Government's fault

"I would prefer that something was a bit more stable, and people took the time and made a proper decision. It's about quality, and how long things will take rather than thinking we can change everything tomorrow... **It takes years to change society and processes.**"

45+, Bury North

"In terms of the NHS, I think they've had very little time to try and turn it around. It'd be harsh to criticise him [Kier Starmer] for the NHS at the minute.

22-35, Dudley