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Legatum Institute Briefing Paper: Who's Voting Reform?

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Executive Summary

The rise of Reform UK represents the most serious challenge to the United Kingdom's established parties since the rise of the UK Independence Party (UKIP) and the Brexit Party. But, until now, little if anything has been known about what drives public support for Reform UK. Who is voting for it and why? And what issues are Reform supporters most concerned about?

Drawing on a unique survey of more than 3,400 self-identified supporters of Reform UK, the largest poll of the party's supporters so far, this Legatum Institute briefing paper throws light, for the first time, on their social and political backgrounds and overriding concerns.

Support for Reform UK has a very distinctive social and political profile, with the party appealing most strongly to middle-aged and older people who live outside London, used to vote for the Conservative Party, and who strongly believe life in the UK today is much worse than it used to be.

Supporters of Reform UK are overwhelmingly concerned about illegal and legal immigration, which they perceive to be out-of-control and damaging Britain, though they also hold negative views of globalisation, Net Zero, and big business. Reform UK supporters are united by a general feeling of discontent with the UK's current economic model, though their concerns about legal and illegal immigration are paramount.

In conclusion, we suggest that unless these strong concerns about both illegal and legal immigration are addressed, concerns which are shared by much of the rest of the population, then there will remain ample space for Reform UK, or a party like it, in the years and decades ahead.

Introduction

The rise of Reform UK represents the most significant electoral challenge to the established political parties since the rise of the UK Independence Party (UKIP) in the early 2010s, and its main successor, the Brexit Party, in 2019.

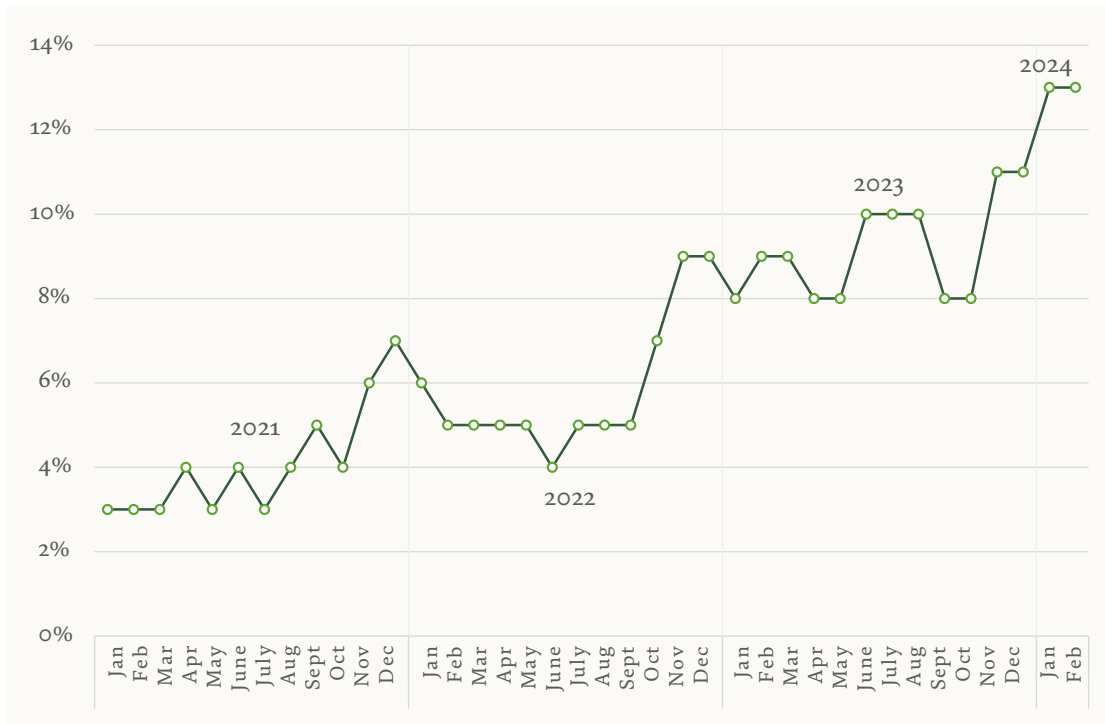
Founded in 2018, with support from Nigel Farage, Reform UK has evolved from campaigning against lockdowns during the Covid-19 pandemic to campaigning against mass legal immigration, illegal migration on small boats, Net Zero policies, high levels of taxation, a big state, and an incumbent Conservative Party which, Reform UK argues, is out-of-touch with much of the country. As its name implies, Reform UK also calls to reform parts of the UK political system, including the House of Lords and the first-past-the-post electoral system.

Contrary to some expectations that the delivery of Brexit in 2020 would remove space for a national populist alternative to the big two parties, since its formation in 2018 Reform UK has attracted steadily rising support in the national opinion polls. Much of this support, the polls suggest, has come from disillusioned former Conservative Party voters and Brexit voters.

In early 2024, for example, polling by YouGov suggested that once undecided voters were excluded; Reform UK was attracting just over one in four people who had supported Boris Johnson and the Conservative Party in 2019, and just over one in four who had voted for Brexit at the national referendum in 2016.¹

Figure 1

Support for Reform UK in opinion polls, 2021-2024.



Source: Reform UK support in UK opinion polls. Accessed via UK Wiki Polls.

Since the summer of 2022, Reform's average support in the polls has increased three-fold from an average of 4 to 12 per cent. At the same time, it has attracted steadily rising support at parliamentary by-elections, notably in February 2024, in the pro-Brexit seats of Kingswood and Wellingborough, when Reform polled 10.4% and 13% respectively, with the latter a record high. In March 2024, Reform gained its first Member of Parliament after former Conservative MP Lee Anderson defected to the insurgent party.

But many questions about Reform and its support remain unanswered. There is a glaring lack of reliable and robust research on this phenomenon. Who, exactly, is supporting this rebellion on the right of British politics, and why? What are their views and beliefs when it comes to the most pressing issues facing the country, including the national economy, immigration, Net Zero policies, and more? And what is this rising support for Reform telling us about the state of contemporary conservatism, British politics, and wider trends across Western democracies?

This unique Legatum Institute briefing paper directly addresses these gaps by drawing on an exclusive online survey of 3,421 self-identified supporters of Reform UK, the largest survey of its kind to date. The survey was conducted by People Polling Limited on 4th-8th February 2024, shortly before Reform UK enjoyed record support at two by-elections and while it was averaging 10% of the vote in national opinion polls.

Our sample of Reform UK voters is comprised of British adults who stated they were planning to vote for Reform UK at a general election, with the filtering question as follows: "If there were to be a general election tomorrow, which party would you vote for?" Respondents who selected Reform UK as their option were then included in the study. For the first time, this allows us to paint a detailed picture of who is supporting Reform UK and why.

Reform Voters: Who Are They?

Much like supporters of Reform's two predecessors, UKIP and the Brexit Party, Reform supporters have a distinctive social and political profile.

They tend to be middle-aged or elderly, with a slight bias toward men, live outside London and Scotland, were overwhelmingly supportive of the Conservative Party at the last general election (in 2019) and were very likely to have voted to leave the European Union at the national referendum in 2016.

Table 1

DEMOGRAPHIC BREAKDOWN		DEMOGRAPHIC BREAKDOWN	
Sex		Region	
Female	42%	London	5%
Male	58%	Midlands/Yorkshire	24%
Age		North	29%
18-24s	0%	Non-London South	38%
25-44 yrs old	23%	Scotland	4%
45-64 yrs olds	38%	2019 Vote	
65 years+	39%	Conservative	67%
Social Class		Labour	4%
AB	36%	Lib Dem	1%
C1	22%	Brexit vote	
C2	23%	Leave	86%
DE	19%	Remain	7%

Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

Of our more than 3,400 respondents, more than three-quarters were aged over 44, with the largest group, 39% of respondents, aged 65 and above.

This is consistent with UKIP and Brexit Party support, which was strongest among older voters who had often come of age in an era before Britain was fully committed to EU membership and had opened to the door to mass immigration.

Turning to social class, based on our sample, Reform UK appears to be drawing its support relatively evenly from across the social classes.

While more than one-third of Reform supporters, 36%, describe themselves as upper/middle-class (AB), usually working in professional-managerial occupations, 22% put themselves in (C1) supervisory, clerical, and junior managerial, administrative, and/or managerial occupations, and a larger 42% identify themselves as working-class, working in skilled manual occupations (C2) or semi-skilled and unskilled manual occupations, or unemployed. While Reform UK has a strong working-class following, like UKIP, it is important to stress that it also has a significant following among the professional middle-classes.

Turning to the political backgrounds of Reform UK voters, our results reveal the overwhelming majority voted for the Conservative Party at the last general election, underlining the threat this new party poses to the incumbent Conservative Party. Overall, over two-thirds (67%), said they voted Conservative at the last general election (in 2019), while only 4% said they voted Labour.

Meanwhile, a striking 86% of Reform voters backed leaving the EU at the 2016 referendum, providing further evidence of how the party has stepped into the space vacated by UKIP and the Brexit Party, appealing to a distinctive group, united by similar concerns about Britain's relationship with the European Union and perhaps closely related issues, like immigration.

Both findings point strongly to the conclusion that, currently, Reform UK is drawing the bulk of its support from disillusioned former Tories who supported leaving the European Union and might have turned to Reform UK to vent their frustration with the direction of contemporary conservatism.

It also suggests that Reform UK is now directly benefitting from the failure of the post-2019 Conservative Party to capitalise on the post-Brexit realignment which propelled the party and Boris Johnson into office with an eighty-seat majority, a realignment that saw the Conservative Party reshape itself around mainly working class, non-graduate, older, and culturally conservative voters. But to know this for sure, we need to explore their beliefs and attitudes toward a wide range of issues and policies, to which we now turn.

Reform Voters: What Do They Think?

In terms of organisation and personnel, the Reform party is rooted in the anti-EU campaigns that were led by the Brexit Party in 2019, the UK Independence Party during the 2000s and the early 2010s, and, in an even earlier era, movements like the Anti-Federalist League and the Referendum Party in the 1990s.

Many Reform UK activists and candidates, including Nigel Farage, have direct links to these parties, so in terms of its organisation and personnel Reform UK should be seen as a continuation of the mainstream tradition of party-based Euroscepticism in UK politics.

This is an important point. Unlike other national populist parties in Europe, many of which are rooted in campaigns against immigration, Reform UK is foremost anchored in this long and uniquely UK tradition of campaigning against the EU and for national sovereignty. This provides it with what academics call a reputational shield, making it inaccurate to describe the party simply as an anti-immigration party. Its roots are both broader and deeper.

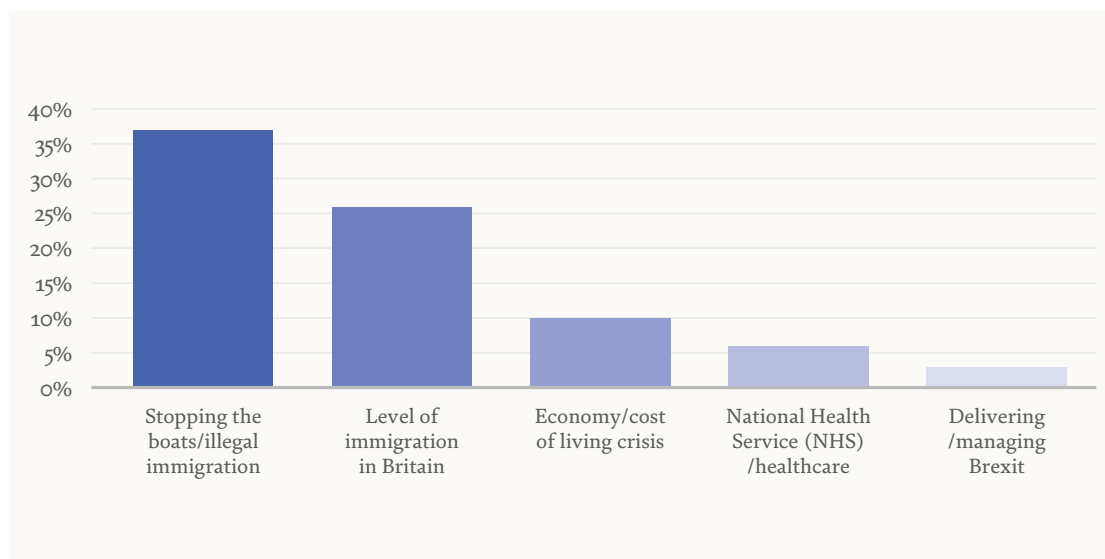
That said, when we ask Reform UK supporters to tell us about their overriding concerns, they now tend to point to one issue: immigration. With the UK having formally left the European Union in 2020, it is clear from our findings that the overwhelming focus among Reform supporters has shifted to both legal and illegal immigration.

It is important to stress that these issues have become far more salient to *all* voters in recent years, not just Reform UK supporters, as a succession of post-Brexit Conservative governments presided over a record increase in net migration, rising to around 700,000 in 2022-23, while losing control of the UK's borders. The latter is symbolised by the fact that more than 112,000 illegal migrants have entered the UK on small boats in the Channel since 2018² while, according to data in early 2024, only 1.3% of these illegal migrants have been removed from the country.

When Reform UK supporters are asked to choose the most important issue that will determine how they vote at the next general election, their priorities in rank order were as follows: (1) stopping the small boats (37%); (2) dealing with the level of immigration in Britain (26%); (3) the economy/cost of living crisis (10%); and (4) the NHS/healthcare (6%).

Figure 2

Reform UK supporters' responses when asked to choose the most important issue that will determine how they vote at the next general election.



Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

While Reform is not a single-issue movement, it appeals to disillusioned voters who are overwhelmingly concerned with illegal and legal immigration, which they clearly feel have been badly managed by the established parties, including the incumbent Conservative Party, which has been in office for fourteen years.

Beyond this strong focus on immigration, we also find Reform voters are united by a sense of pessimism about the direction of UK society. They appear convinced the future will be worse than the present and that the present is already worse than the past. When asked whether, overall, life in the UK today is better, worse, or about the same as it was 30 years ago, most Reform supporters, 85%, say life in the UK today is worse than it was 30 years ago. Only 7%, less than one in ten, think life has improved over the last three decades. The vast majority think life has got worse, a view that may be shaped by their very strong concerns about the scale and speed of illegal and legal migration in the UK.

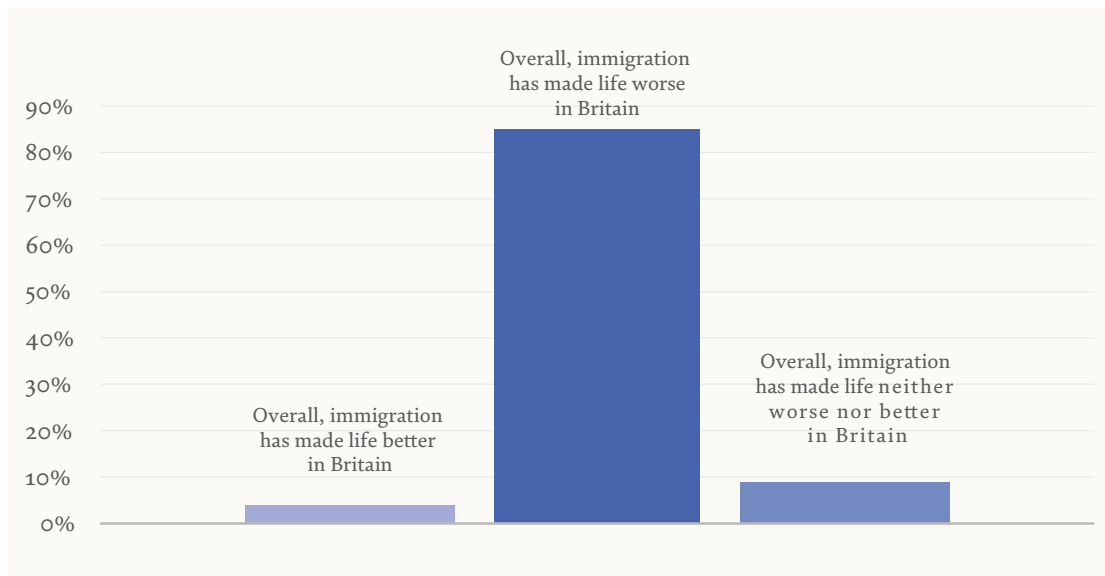
Indeed, when Reform voters are asked whether, overall, immigration into Britain has made life better, worse, or made no difference, the vast majority, 85%, think "immigration has made life worse in Britain" while 9% think it has made no difference and just 4% think immigration has made life better in Britain.

Reform supporters, in short, are both overwhelmingly concerned with, and deeply pessimistic about, the effect immigration is having on Britain. And it is important to note that this concern and pessimism reflects wider trends in the country.

Contrary to what many columnists and commentators suggest, namely that most British people are enthusiastic and supportive of the new era of mass immigration, in recent months and years they have become notably more pessimistic about both the level of immigration and its actual or perceived effects on the country. In this regard, these views are by no means unique to Reform supporters.

Figure 3

Below are some statements. Please say which statement you most agree with, even if you don't completely agree with it.



Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

In February 2024, for example, polling by YouGov suggested that the share of *all* voters who thought immigration "has been too high" over the last ten years had reached a new, record high of 64%, while the share who think immigration into Britain over the last decade "has mainly been

good for Britain" slumped to a new record low of just 21%.³ Other analysis suggests that wanting to lower migration is now the dominant view in at least 80% of all seats in the UK, underlying how reducing immigration has become what academics call a valence issue – namely, one that the vast majority of people agree with.

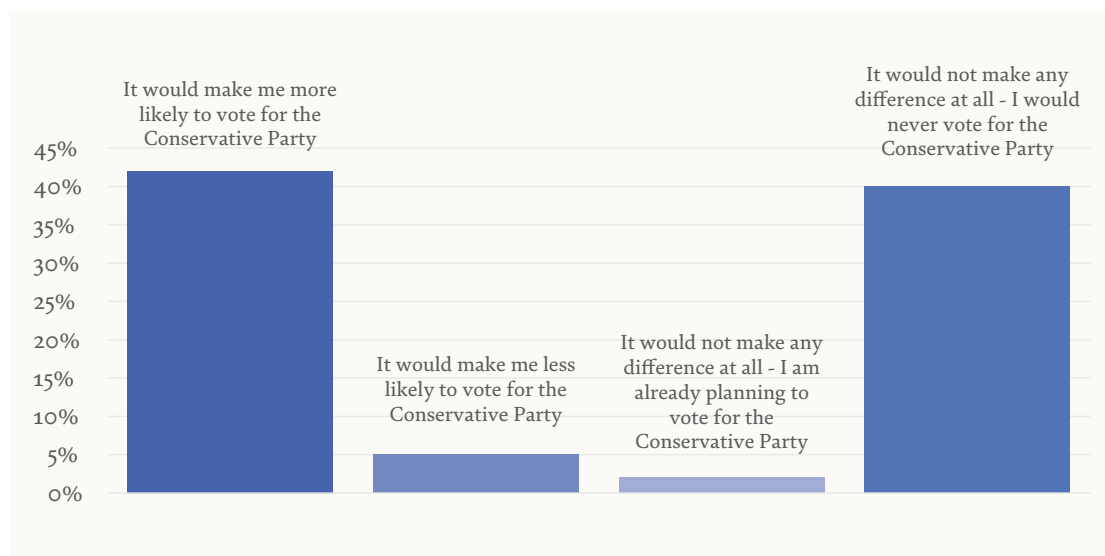
Reform UK, therefore, appears to be benefitting not just from the remnants of the Brexit Party and UKIP but a much larger reservoir of public concern about the scale and effects of large-scale immigration, especially the liberalisation of the immigration regime following the vote for Brexit.

Keeping their views about immigration and past political loyalties in mind, we also asked Reform supporters whether the prospect of the Conservative Party offering the country a national referendum on reducing the rate of migration from nearly 700,000 today to less than 100,000 would make them more or less likely to vote Conservative at the next general election.

Significantly, we find the most popular view, shared by 42% of all Reform supporters, is that such a pledge would make them more likely to vote for the Conservative Party at the next election, while 40% said such a pledge would not make any difference at all because they would never vote for the Conservative Party. After dividing our sample into strong Reformers, who are absolutely certain to vote for Reform, and Reformers on the fence, who say they are less certain to vote for Reform, we find that almost half of the latter group, 47%, say they would be more likely to vote Conservative should such a pledge be made.

Figure 4

Imagine Rishi Sunak and the Conservative Party offered the country a referendum on reducing net migration from nearly 700,000 today to less than 100,000 in the years ahead. To what extent, if at all, would this make you more or less likely to vote for the Conservative Party at the next general election?



Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

This does suggest, then, that a significant chunk of the Reform electorate might be convinced to return to the Conservative Party by a bold and radical offer on immigration, such as a national referendum.

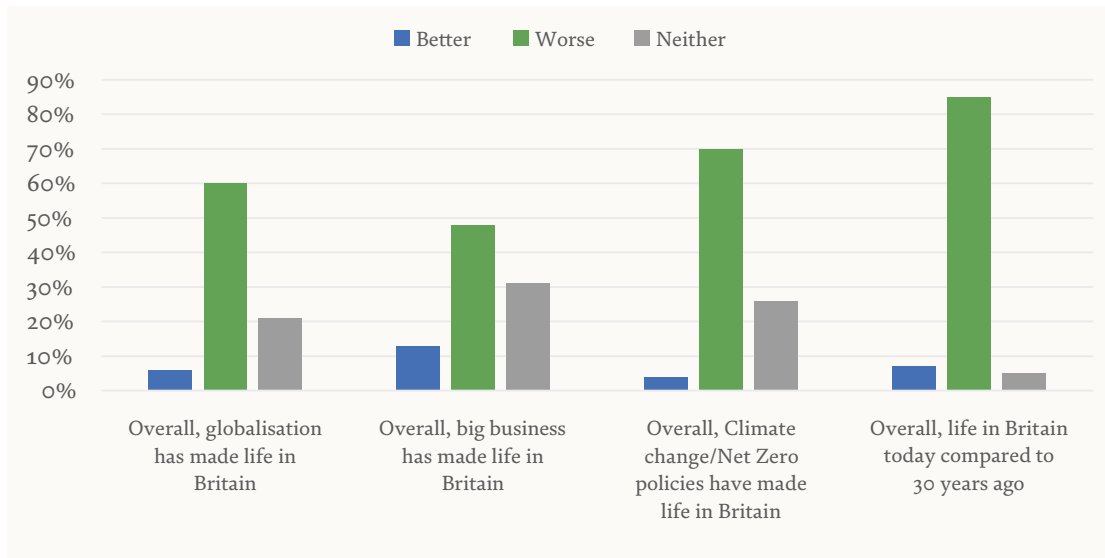
Interestingly, however, this pessimism is not limited to immigration. Reform UK supporters are also pessimistic about a range of other issues in British society, from Net Zero policies to the country's current economic model.

Regarding Net Zero, an issue which is being actively targeted by Reform, when asked whether, overall, climate change/Net Zero policies have made life better in Britain, made life worse, or made no difference, seven in ten Reform supporters think Net Zero policies have "made life worse" while only one in twenty, or 4%, think they have "made life better", with a remaining 26% thinking Net Zero policies have made life neither better nor worse. This suggests that, among Reform supporters, Net Zero policies are very unpopular and contributing to their general sense of pessimism about the current direction of Britain. It also suggests that, while this scepticism is not shared to the same extent by the public at large, it has become an important aspect of Reform's current support.

Notably, most of the people who have rallied to Reform UK say they are sceptical about the impact globalisation is having on Britain. Contrary to the popular view of Reform supporters as people who are instinctively comfortable with globalisation and free trade, we find a more nuanced and different picture.

Figure 5

Below are some statements. Please say which statement you most agree with, even if you don't completely agree with it.



Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

Overall, three-fifths of Reform UK supporters share the view that globalisation has made life worse in the UK while only 6% think globalisation has made life better and 21% think it made no difference.

The fact that 60% of Reform voters hold a negative view of globalisation speaks volumes, suggesting many have rallied behind Reform are deeply worried about the actual or perceived impact of globalisation on the UK economy and workers.

It may be that these voters feel their leaders are routinely prioritising the interests of global

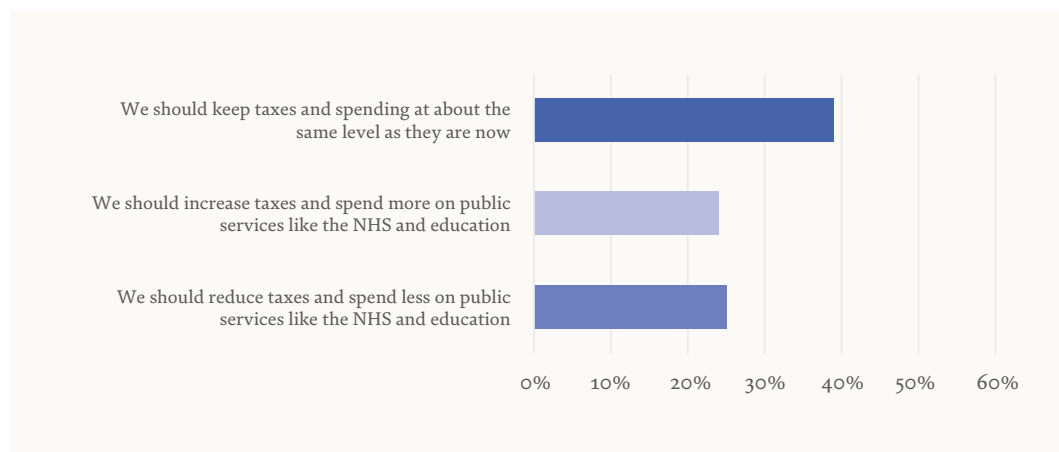
corporations and international markets over the perceived interests of the national community and economy. In this respect, Reform is making inroads among people we might call "national conservatives", voters who simultaneously hold strong concerns about the impact of illegal and legal immigration on the country but who also worry about the impact of corporations which they may perceive to be more interested in importing cheap labour from abroad than serving the interests of a national economy and national community.

This picture is reinforced when we asked Reform supporters whether, overall, they feel big business has made life better in Britain, made life worse, or made no difference. Only 13% of Reform voters think big business has made life better in Britain while almost half the sample, 48%, think big business as made life worse in Britain, leaving 31% who think it has made no difference.

Once again, we find an instinctive pessimism among Reform supporters when it comes to the actual or perceived role of big business in British society. When viewed with our other findings, this points to a group of voters who are not only worried about the impact of mass immigration.

Figure 6

Thinking now about taxation in Britain, which of the following statements comes closest to your view?

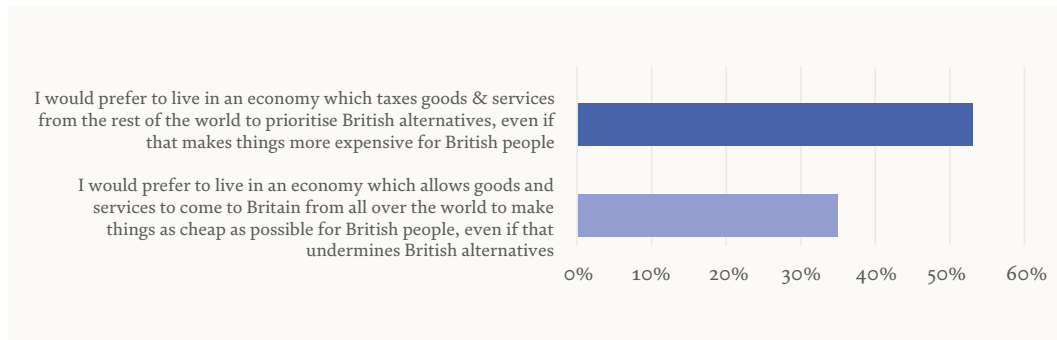


Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

Interestingly, these distinctive economic views also emerge when we ask Reform supporters which of the following statements about economic policy come closest to their own view, namely: (1) "I would prefer to live in an economy which allows goods and services to come to Britain from all over the world to make things as cheap as possible for British people, even if that undermines British alternatives"; or (2) "I would prefer to live in an economy which taxes goods and services from the rest of the world to prioritise British alternatives, even if that makes things more expensive for British people".

Figure 7

Below are two statements. If you had to choose one, even if you don't completely agree with it, which comes closest to your view?



Source: Legatum Institute/People Polling Ltd. N = 3,421 self-identified Reform UK supporters.

Once again, contrary to the view some people might hold of Reform party voters as comfortable free traders who want to make goods and services as cheap as possible, we find that most of them, 53%, would prefer to tax goods and services from the rest of the world to prioritise British alternatives. Just over one-third of Reform supporters, 35%, would instead prefer to make things as cheap as possible for British people even if this weakens British alternatives. However, Reform supporters are relatively divided on this issue.

We also find considerable disagreement among Reform voters when it comes to the issue of tax and spend. When asked whether Britain should reduce taxes and spend less on public services like the NHS and education; should raise taxes so we can spend more on public services like the NHS and education; or should keep taxes and spending at about the same level as they are now, Reform supporters split into three distinct groups. While a plurality, 39%, want to keep taxes and spending at about the same level as they are now, 25% want to reduce taxes and spending and 24% want to increase taxes and spending, with the remainder saying they do not know.

Conclusions

Reform UK is drawing support from people who share a distinctive social, political, and attitudinal profile. Above all, they are strongly concerned about the scale and impact of both illegal and legal immigration into the United Kingdom and deeply pessimistic about its results. They are also firmly of the view that life in the United Kingdom is getting worse, not better.

While these concerns over immigration are dominant, Reform UK supporters are also very pessimistic about other trends in UK society, including globalisation, Net Zero, and big business. They feel that our politics and national conversation are shaped too heavily around socially liberal if not radically progressive values, beliefs, tastes, and priorities. They are firmly opposed to mass immigration, Net Zero policies, weaker national borders, and a national economy which they believe prioritises the interests of global firms and big business over the interests of the British people and British firms.

Furthermore, our analysis suggests that the longer the issue of mass immigration remains salient in British politics, the better Reform UK will do. Immigration is now the top concern of all for 2019 Conservative Party voters and the third most important issue for all voters in the country. In short, the longer people remain concerned about this issue the more space will emerge for Reform UK, or a party like it. The liberalisation of immigration policy since Brexit has kept this space wide open to new challengers.

Notes

- 1 See, for example, regular YouGov national polls https://ygo-assets-websites-editorial-emea.yougov.net/documents/TheTimes_VI_240221_W.pdf
- 2 Migration Observatory. 'Deportation, removal, and voluntary departure from the UK', 14 February 2024 <https://migrationobservatory.ox.ac.uk/resources/briefings/deportation-and-voluntary-departure-from-the-uk/>
- 3 <https://yougov.co.uk/topics/politics/trackers/do-brits-think-that-immigration-has-been-too-high-or-low-in-the-last-10-years;> <https://yougov.co.uk/topics/politics/trackers/has-immigration-in-the-past-10-years-been-good-for-britain>

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