

# Who are Reform UK's Red and Blue voters?

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And what do they think about regulation?

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# Introduction

Reform UK is on the rise. Once a fringe successor to the Brexit Party, it is now leading the polls, winning by-elections in Labour heartlands, and shaping the electoral strategies of both major parties.

As its influence grows, so too does the need to better understand its voter base. Who are the voters that make up Reform UK's coalition? What issues unite them – and where do they diverge? Are they, as you might expect from a right-wing party, animated by libertarian policies, keen to shrink the state and deregulate the economy? And, crucially, are there ways to reach or engage them with the right narrative?

This public opinion review brings together the latest polling and focus group data to answer these questions. We find that although Reform UK – and UKIP before it – have often been depicted as a party of older, small-state, Brexit-supporting voters, this view is simplistic and increasingly outdated. In reality, the party draws together a much more complex coalition.

While Reform UK's leadership may be profoundly influenced by a pro-market agenda – often [railing against EU regulation](#) or aligning themselves with the [interests of global corporations](#) – we find that its voter base is much more complex. Unchecked UK's [polling](#), for example, found fewer than a third of 2024 Reform UK voters agreed that regulation tends to hold back the economy and intrude on people's lives. This is hardly an emphatic endorsement of the libertarian worldview.

Recent party interventions indicate a growing awareness of this at the top of the party. In recent months, Reform UK's leadership has gone to increasing lengths to brand themselves as on the side of working people – whether that's through [pro-union statements](#) or pledges to ['re-industrialise Britain'](#) through significant state investment.

Regulation is a particularly useful way of exploring this complexity. Although Reform UK is ostensibly a deregulatory party (frequently decrying the regulatory 'zeal' of the EU and the ['nanny state'](#)), we find that the attitudes of their voters cannot be neatly characterised as on the left or right of this spectrum. In fact, these voters display far more fluidity in their views, backing measures to regulate large corporations or bring back UK utilities into public ownership – whilst also being the most [supportive](#) of Elon Musk's Department for Government Efficiency (DOGE), for example.

In mapping these complexities, **this review aims to inform the strategic choices of progressive campaigners seeking to engage, persuade, or contest these voters, particularly those of us making the case for strong social and environmental protections.** We hope it provides a useful starting point to consider how we can craft our narrative – and how we respond to the populist political project in the UK.



# 1. Understanding Reform UK's voter base

## The collapse of the Conservative Party and the rise of Reform

Reform UK began life as the Brexit Party, winning just 650,000 votes at the 2019 General Election and no seats in the House of Commons. For the first few years of the following Parliament, its fortunes changed little.

However, as the Tories imploded, this began to change rapidly. With broad swathes of the electorate feeling exasperated by years of scandal and broken promises, large numbers of voters turned to Reform UK. By 2024, they were able to secure over 4m votes – slightly more than UKIP's all time high of 3.8m in 2015.

The vast majority of these voters – nearly 80% – [voted Conservative in 2019](#). However, this does not necessarily make them natural Conservatives. Many Leave voters began to see the Conservatives as the natural party of Brexit after the 2016 referendum, as evidenced by the large numbers of UKIP voters that [backed Theresa May](#). And so with Johnson's manifesto pledge to 'Get Brexit Done', many Leave voters again opted for the Conservative Party.

### Figure 1: How did 2019 voters vote in 2024

Which party did you vote for at the General Election in July 2024?  
% of 31,490 voters who voted at the 2019 AND 2024 general elections



The success of Reform UK at the 2024 General Election might be better explained as the return of historic UKIP voters to Farage, driven primarily by a breakdown of trust in the Conservatives. [Research](#) by academics at Royal Holloway and the University of Portsmouth suggest this is a reasonable interpretation. Their work on the geographic and social demographics of both UKIP and Reform UK argues that the main story is “one of continuity rather than change”. The authors stress that:

*“The social base of support for Reform—both at the individual level and constituency level—bears striking similarities to that of UKIP nearly ten years earlier. There is also remarkable continuity between the places that previously backed UKIP and those which now back Reform.”*

It is interesting to note that despite all the talk of Farage providing a voice for alienated voters, he did little to persuade non-voters to vote in 2024. The 2024 election saw just [59.9% of the public cast a ballot](#) – the worst turnout since 2001. Reform UK’s success is therefore far more a story of the party benefiting from Conservative collapse than it is about Reform UK’s mobilisation of ‘drop-out voters’.

Since the 2024 election, Reform UK has continued to benefit from the Conservative Party’s challenges. According to [YouGov voting intention data](#), of those that voted for the Tories in 2024, 31% would now vote Reform UK, up from 15% at the beginning of the year. Meanwhile, just 8% of 2024 Labour voters and 8% of Liberal Democrat voters would now vote Reform UK.

## The populist coalition – Reform UK’s Blue and Red voters

The stereotype of the party’s base as a collection of disaffected, small-state, older Leave voters holds some truth. Reform UK attracts a group of voters who are typically slightly more affluent than the working class and more economically libertarian in their beliefs. They are animated by a desire to shrink the state, are sceptical of income redistribution and benefits, and are opposed to regulating the private sector. They are also deeply socially and culturally conservative, especially in relation to immigration.

A typical voter from this group is a small business owner, most likely retired. They could be self-employed tradesmen or a market trader, for example. What is important about this group is that they often hold

highly individualistic beliefs, rarely seeing the state as the answer to problems across society. These are voters sandwiched between the working and middle classes – a group which, as the natural home of Margaret Thatcher, has always been a [bedrock of support](#) for small state (although not necessarily libertarian) thinking. Indeed, Reform UK voters are almost as likely as Conservatives to [think](#) Margaret Thatcher had a positive long term impact on the country. As per [YouGov’s original categorisation](#) of UKIP voters, they could be referred to as ‘Blue Reform’ voters.

However, all political parties bring together diverse beliefs, and Reform UK’s coalition is no different. As we will explore in greater detail, the party also attracts a proportion of voters with what could be described as more traditional working class attitudes. These voters value a strong state and believe in redistribution and the need for robust regulations. This segment of the Reform UK coalition could be labelled ‘Red Reform’ voters. These voters are most likely part of the roughly [25% of 2024 Reform UK](#) voters who had voted for Labour in at least one election since 2003.

This complexity to Reform UK’s voter base bears many strong similarities to the dynamics within UKIP. [Research](#) from 2015 concluded that the party was primarily “an alliance between the working class and the self-employed (and employers), rather than a party of the disadvantaged.” Part of this working class base, the research argues, came from ex-Labour voters who felt alienated from the liberalism of New Labour, and began to search for alternative vehicles for their social conservatism.

Research on the attitudes of Reform UK voters towards regulation of the private sector provides a useful way of exploring this key rift. [Polling](#) shows they are fairly split as to whether more regulation on businesses is generally in the interests of ordinary people. 33% say it is not, while 20% say it is. This divide could be explained as the Blue Reform voters interpreting it as meaning further regulation on *their* small business, while the more working class segment likely interprets the regulation of the private sector as meaning further protections for workers against exploitative employers.

YouGov [polling](#) from November last year confirms a similar dynamic. When asked whether reducing taxes and regulations for businesses benefits the wider economy and the general population, 42% of Reform UK voters said it does, compared to 32% that say it does not (see Figure 2). This puts them far closer to Conservative voters than it does Labour and Lib Dem voters, and again underscores the internal tension within Reform UK.

**Figure 2: Does reducing taxes and regulations for businesses and the wealthy benefit the wider economy and general population?**



4970 GB adults surveyed. 11 November 2024

Source: YouGov, November 2024

This is perhaps why, despite the image of Farage’s party as turbo-charged Thatcherism, he has often shown such ideological flexibility. Ahead of the 2015 General Election, he **echoed** Labour’s criticism of zero hours contracts, promised to scrap the bedroom tax, and even campaigned to ‘protect your benefits’ during the Wythenshawe by-election. This leftward turn put UKIP much more in step with European populist parties, which **often campaign** on platforms offering strong economic and social protections. Reform UK’s recent pivots in relation to welfare and trade unions begin to make far more sense within this historical context.

Splitting Reform UK into two blue and red camps is, of course, crude. However it is important to recognise that the party has a faction – as did UKIP before them – that is not animated by promises to strip back the state or deregulate the economy. As will be discussed later in this report, this is where the opportunity could lie for progressive campaigners, including those who advocate for strong protections.



# 2. What unites the Reform UK coalition?

## Pessimism and disillusionment

There are two key factors which drive support for Reform UK, says [Luke Tryl](#), director of More in Common. These boil down to: “[these voters] being more likely than not to think the country is getting worse, and more likely than not to feel disrespected.” According to the pollster, just **3 in 10 Reform UK voters say they feel respected, and as a group, they score particularly low in terms of their satisfaction with their finances and their work.**

HOPE not hate’s [research](#) from September 2024 confirms a similar outlook. They found that **95% of Reform UK supporters believe Britain is in decline, while just 2.8% disagreed** – figures which are significantly out of step with the broader public (see Figure 3). This bleak outlook is compounded by a strong sense of pessimism, with nearly 80% of Reform UK voters saying they are pessimistic about the future compared to just 21% who are optimistic.

Figure 3: Optimism vs pessimism about the future



Source: HOPE not hate, September 2024

Reform UK voters are also more likely to have given up hope that mainstream politicians will improve things. Over eight in ten **(84%) think the political system is broken**, while 92% believe that ‘politicians don’t listen to people like me’ (see Figure 4). While these are not uncommon

sentiments in Britain today, the proportion is significantly higher than the national average, where 71% think the political system is broken and 69% think politicians do not listen to them.

Figure 4: Attitudes to politics



Source: HOPE not hate, September 2024

### Cultural grievances and national identity

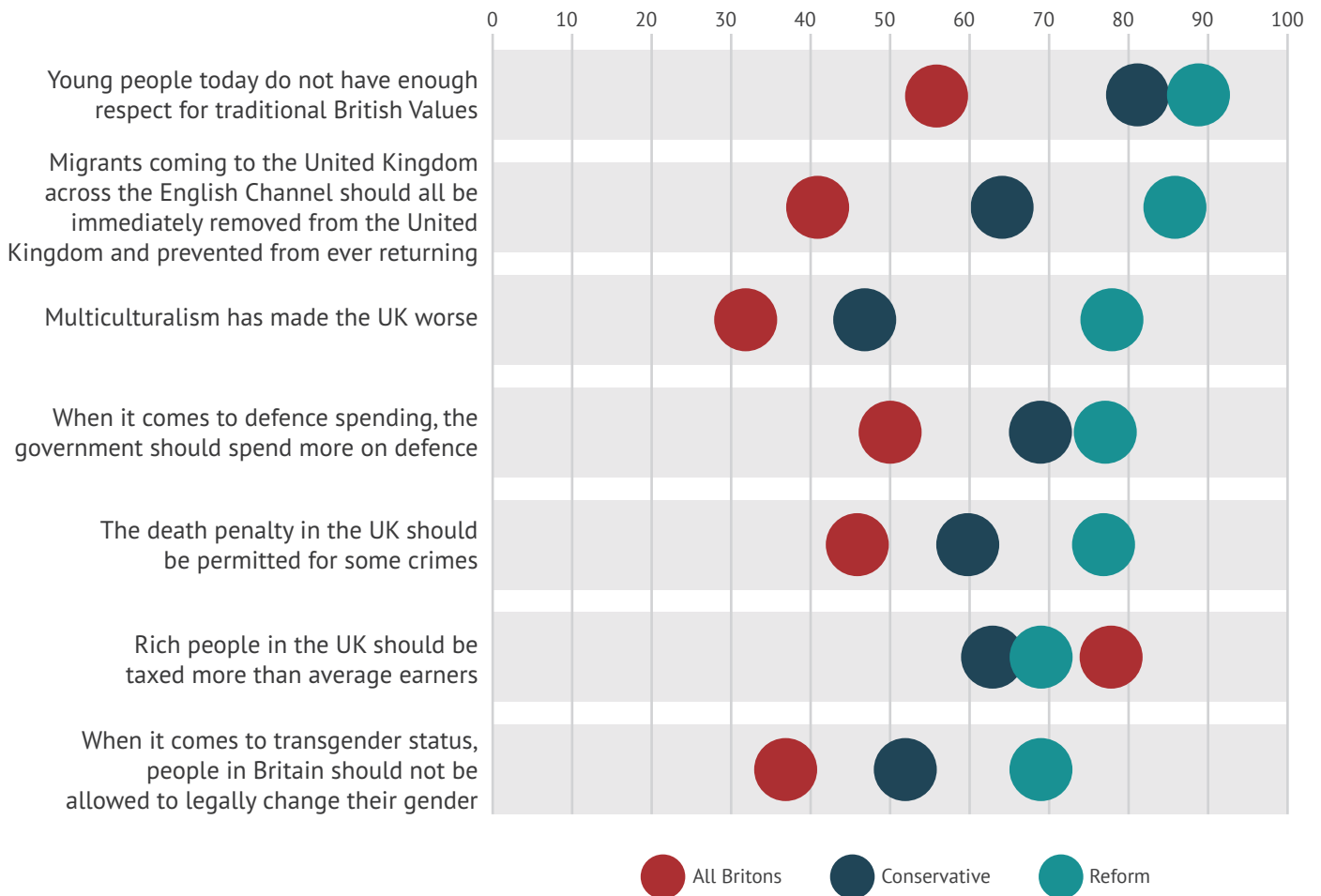
Reform UK voters have a strong sense of national identity. When asked about their [views](#) on different political ideologies, 'nationalism' comes out as the most popular, closely followed by 'conservatism'. **For many, preserving what they see as traditional British identity goes hand-in-hand with resisting social and cultural change.**

**Polling** from YouGov highlights the strength of these views among 2024 Reform UK voters. An overwhelming 89% agreed with the statement: "Young people today do not have enough respect for traditional British values." Large

majorities also backed the statements: "Multiculturalism has made the UK worse" (78%), and "Migrants coming to the UK across the English Channel should all be immediately removed and prevented from ever returning" (86%). Reform voters are also far more likely than the general public to support reintroducing the death penalty in certain cases (see Figure 5).

As Figure 5 below shows, whether it's issues of migration, culture, law and order, or progressive social values like support for transgender rights or the death penalty, Reform UK voters are markedly more hardline than the average voter, including Conservative voters.

Figure 5: Attitudes of Reform UK voters compared to other voters



Source: YouGov, July 2024

A major driver of this worldview is a belief that the country is being reshaped by a liberal elite, whose values run counter to their own. In fact, [polling](#) shows that the second most popular reason for supporting the party at the 2024 General Election was that “Reform would oppose wokeness in all forms” (50%), behind a belief that they would reduce immigration (71%).

This hostility to so-called ‘woke’ agendas is especially evident in views on Diversity, Equity and Inclusion (DEI) regulation. YouGov [polling](#) found that Reform UK voters are significantly more likely than any other party’s supporters to say that DEI has “gone too far”. For example:

- 65% said DEI efforts for ethnic minority communities had gone too far (compared to 39% of Conservatives, 11% of Labour voters, and 12% of Lib Dems).
- 61% said the same about initiatives aimed at transgender people.
- 51% said DEI had gone too far for lesbian, gay, and bisexual people.

### Distrust of big (foreign) business

Reform UK voters also tend to express economically populist sentiments, broadly agreeing that the economy is structured in a way that doesn’t benefit ordinary people. YouGov’s [poll](#) found that 73% think ordinary working people do not get their fair share of the nation’s wealth,

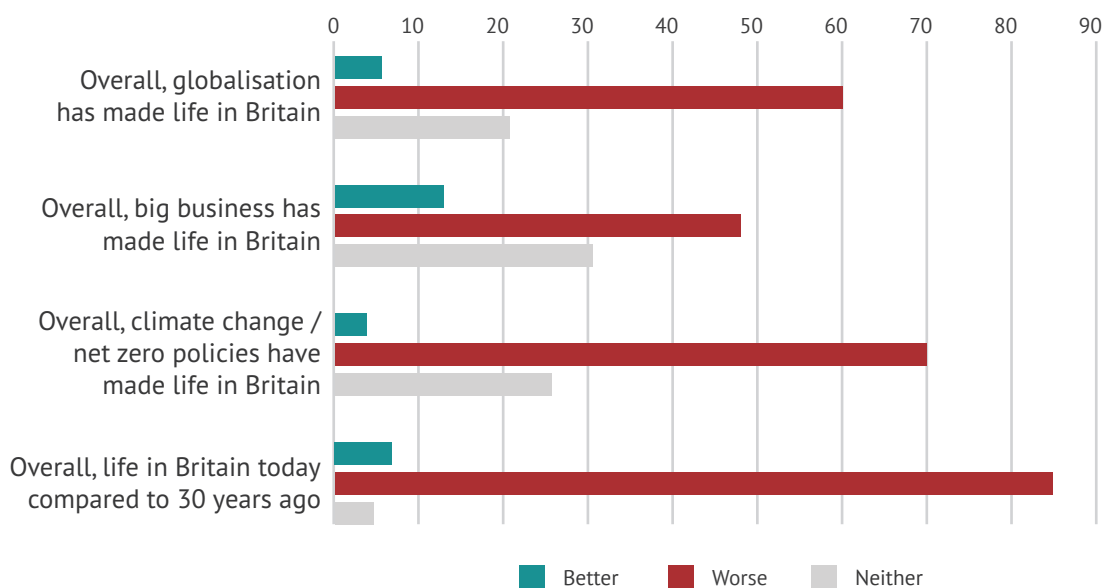
whilst 69% agreed that the rich should be taxed more than average earners. On top of this, 74% think big businesses take advantage of ordinary people and 78% said rich people are able to get around the law more easily.

These sorts of opinions suggest a large section of Reform UK’s voter base are unhappy with the direction of travel of Britain’s economy. As Luke Tryl [says](#):

*“If I listen to a group of Reform UK voters and they’re talking about the economy, they could be Corbynites. They’re saying big business prices are too high, we need to nationalise more. There’s this real sense that economic growth is set up to benefit the rich and powerful.”*

These findings resonate with the former academic Matt Goodwin’s 2024 [research](#) for the right-wing think tank, The Legatum Institute, which found strong scepticism towards both globalisation and big business. He found that 60% of voters thought globalisation had made life in Britain worse, whilst just 6% said it had made life better and 21% said it made no difference. Similarly, 48% said the same of big business – compared to just 13% who think it has improved life and 31% who said it had made no difference. All of this paints a picture of an average voter that is frustrated by both the dominant economic model and the impunity of corporate elites.

Figure 6: What’s made life in Britain better or worse?



Source: Legatum Institute, March 2024

Farage's followers are clearly not aligned to a vision of Britain shaped by unregulated markets and dominated by global capital. In fact, Goodwin concludes from his research that:

*“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 goes a long way in explaining why Reform UK voters are also sympathetic to tariffs. Goodwin's research found that over half (53%) said they would be happy to tax goods and services from abroad to prioritise British alternatives, even if they made them more expensive, meanwhile a third (35%) said they wouldn't. Whilst there is division here – perhaps due to the prospect of a price increase during a cost of living crisis – it does suggest a large chunk of Reform voters are strongly supportive of prioritising UK businesses over foreign capital.

Reform's leadership are seemingly aware of this. Whilst they were once seen as a party of 're-heated Thatcherites', their pitch to the electorate at the previous general election was different. Their [manifesto](#) promised to lift the corporation tax threshold to £100,000 (from £50,000) and pledged to abolish business rates for small and medium-

sized businesses on the high street, paid for by an 'Online Delivery Tax' of 4% on "large, multinational enterprises". Moves like this suggest the party is making a [direct pitch to](#) small business owners and positioning themselves as the party of domestic 'family capital', rather than national and international capital.

Public ownership is another area where the party has increasingly diverged from conventional pro-market policies. In their [manifesto](#) Reform promised "tighter regulation and new ownership models for critical national infrastructure". This new model would "remove foreign ownership" of UK utilities and would see at least 50% come into public ownership with the other 50% owned by British pension funds.

This sort of economic nationalism finds broad support amongst their voter base. Over [three quarters](#) (77%) would like to see water companies better regulated, meanwhile [84% supported](#) Labour's proposal in the King's Speech to make the CEOs of water companies personally liable for company wrongdoing. On top of this, proposals to bring key utilities into public ownership regularly get between [57% to 71%](#) support depending on the poll – policies that were [similarly popular amongst UKIP voters](#).

In general, **Reform UK voters share a similar diagnosis of the problems facing Britain. In their eyes, the nation is in decline.** The reasons are best attributed to what is perceived to be a powerful economic elite in the form of foreign capital and unscrupulous CEOs, and an influential metropolitan elite forcing 'woke social values' and pro-immigration policies on the rest of the country.



## 3. What divides Reform UK's coalition?

While there is a shared diagnosis that Britain is broken – and that powerful metropolitan elites, big business and corporate greed are to blame – there is far less consensus when it comes to what should be done about it. And although Reform voters' economic nationalism can lead to support for interventions such as nationalisation and stronger regulation of industry, that does not mean these voters are naturally economically left-wing.

On one side of the coalition are the so-called *Red Reform* voters: often economically precarious, probably former Labour or perhaps non-voters, and more open to state-led solutions. On the other side are Blue Reform voters: typically slightly more affluent, and more ideologically wedded to a small-state, low-tax vision of politics. Both camps may distrust the political establishment and share a populist outlook, but their economic prescriptions diverge sharply.

There is a [clear disagreement](#), for example, over how much the state should be intervening to redistribute income. 42% of 2024 Reform voters say the government should not redistribute from the better off to those who are less well off compared to 33% that say it should.

A similar dynamic plays out when looking at the types of tax rises Reform voters would support. [Polling](#) shows that Reform voters are generally very sceptical of increasing the basic rate of income tax, with just 7% saying they would support it. But that figure jumps to 22% and 48% when asked about increasing the higher rate and top rate of income tax – a clear indication of Red Reform preferences. Meanwhile 60% and 34% respectively oppose such tax increases.

Interestingly levels of support for an increase in the level of corporation tax is split equally at 43% for and against. This aligns Reform UK voters far more with Conservative voters and likely reveals a strong wariness of state overreach unless targeted at a specific offending company or industry (e.g. water utilities).

Attitudes to welfare and benefits expose similar tensions. While some in the coalition support safety nets for working people, there is deep suspicion – particularly among Blue Reform voters – that the welfare system is abused. YouGov [polling](#) with 2024 Reform voters found 61% think benefits in the UK are too generous, compared to 16% that say they are not generous enough and 16% that say neither.

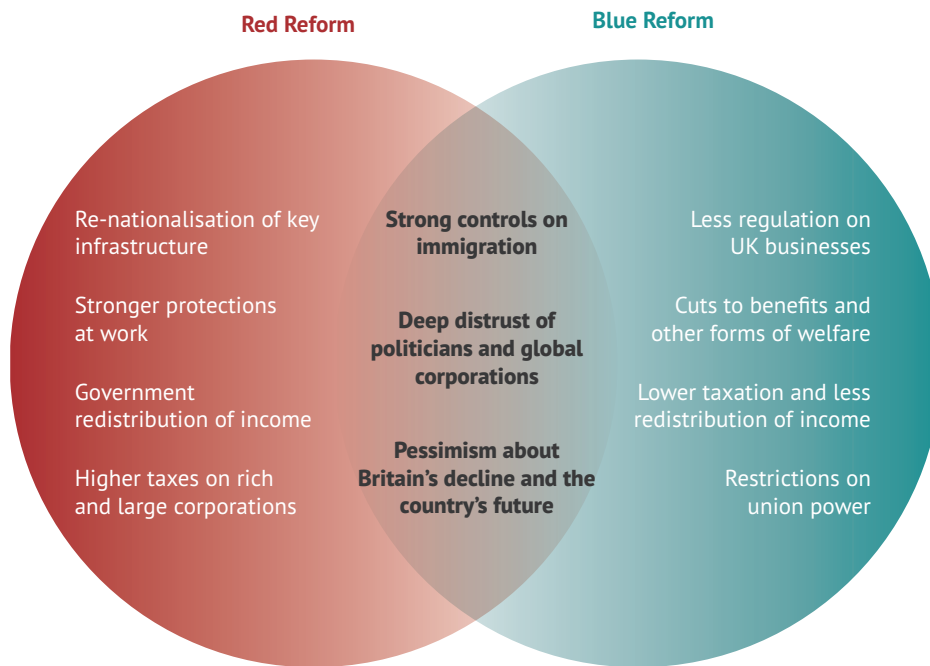
Finally, attitudes towards the state and the public sector are often critical. [Polling](#) on attitudes to government tax and spending priorities reveals this. One of the statements which drew the strongest support from 2024 Reform UK voters was: *'The government could find all the money it needs if it made better decisions - like not giving fat cat train drivers a bumper pay deal'* (78%). This level of support put them on a par with Conservative voters (78%) and placed them dramatically out of step with Labour and Lib Dem sentiments – 22% and 31% respectively.

Similarly, when asked about reducing pension tax breaks for those on higher income tax rates, one of the most popular statements for Reform UK voters was: *'It is blatantly unfair to raise these taxes for ordinary people when the government has just chosen to spend a load of money giving pay rises to public sector workers'* (72%). Again, this put them on a par with Conservative voters (72%) and out of step with Labour (25%) and Lib Dem (30%) voters.

Red Reform voters may be more sympathetic in principle to strikes and pay demands, but this is clearly dwarfed by a strong scepticism towards organised labour. However, Reform UK voters' **attitudes towards worker protections** are often far more supportive. What this likely speaks to is whether support for workers is understood through a lens of preventing big businesses exploiting their workers by banning, for example, zero hours contracts – something which **UKIP voters similarly supported**. Or, whether it is understood as overpowerful unions pushing for excessive pay demands for public sector workers.

These differences matter. While Reform UK's leadership has recently attempted to embrace more economically interventionist language – through calls for nationalisation, worker protections, or 'reindustrialising Britain' – their base does not yet speak with one voice on these issues. The party's challenge will be in reconciling these competing instincts. And for progressives, the opening lies in recognising that although Reform voters are far from reliably left-wing, there is clear space to win support – especially where economic policy can be framed as serving the national interest over an economic elite that puts profits ahead of workers and communities.

Figure 7: The two tribes of Reform UK





# Conclusion

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Reform UK voters are complex. They are not always neatly mappable onto left-right divides and instead hold a blend of views orientated around a brand of national populism which aims to uphold the national interest against the elites – whether that’s exploitative corporations, global capital, rule-breaking CEOs, or a woke liberal elite.

Regulatory interventions are no different. Reform UK voters are not necessarily pro or anti them, despite the common attempts to understand the party’s base through a libertarian lens. The reality is that support or opposition for regulation will depend on how they are coded and framed. These voters are likely to respond well to regulations when they are cast as a tool to punish wrongdoing, protect the national interest, or restore order and security – but not when it’s seen as progressive social engineering or a woke cultural imposition.

Coming to terms with this is key for progressives who want to challenge the rise of far right populist parties. If we want to make a pitch to peel off some of these voters - or at the very least prevent the drift of voters to the radical right - we need to understand how these voters think and what sort of frames resonate with them. This brief overview provides a starting point for a much deeper discussion about how Reform UK is cutting through – and how we create a compelling political alternative.



# About Unchecked UK

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**Unchecked UK** makes the case for common-sense protections which help keep people safe, allow communities to thrive, and protect nature.

We've spent the last six years mapping the influence of **deregulation** on public life – exposing the policies, narratives and actors working to dismantle hard-won social and environmental protections. But with the rise of the populist right, the nature of that threat is evolving.

Right-wing populists may present themselves as tribunes of working people, but beneath lies a deeply libertarian project – one tied to the **interests of powerful actors** who stand to profit from harm.

Our new initiative – **Populism Unpacked** – is designed to help those of us who believe in strong protections counter the false hope offered by the populist right. As well as providing a repository of insights and practical advice, we will provide a hub for all of us who want to join this conversation.


We are a non-partisan organisation, fiscally hosted by the **New Economics Foundation**.

**Find out more about our work:**  
[www.unchecked.uk](http://www.unchecked.uk)

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