

How Reform Broke Through: The 2025 Local Elections

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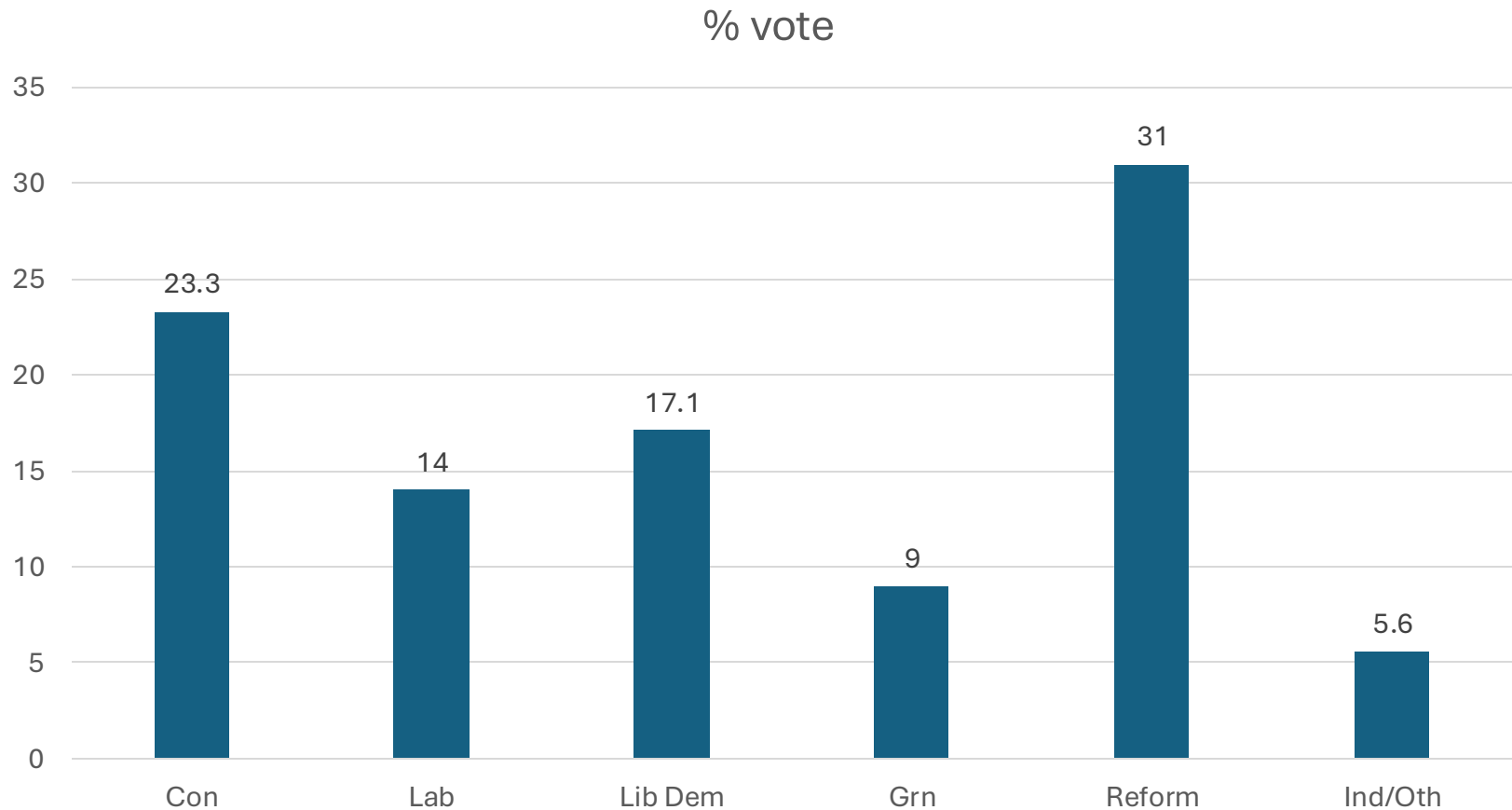
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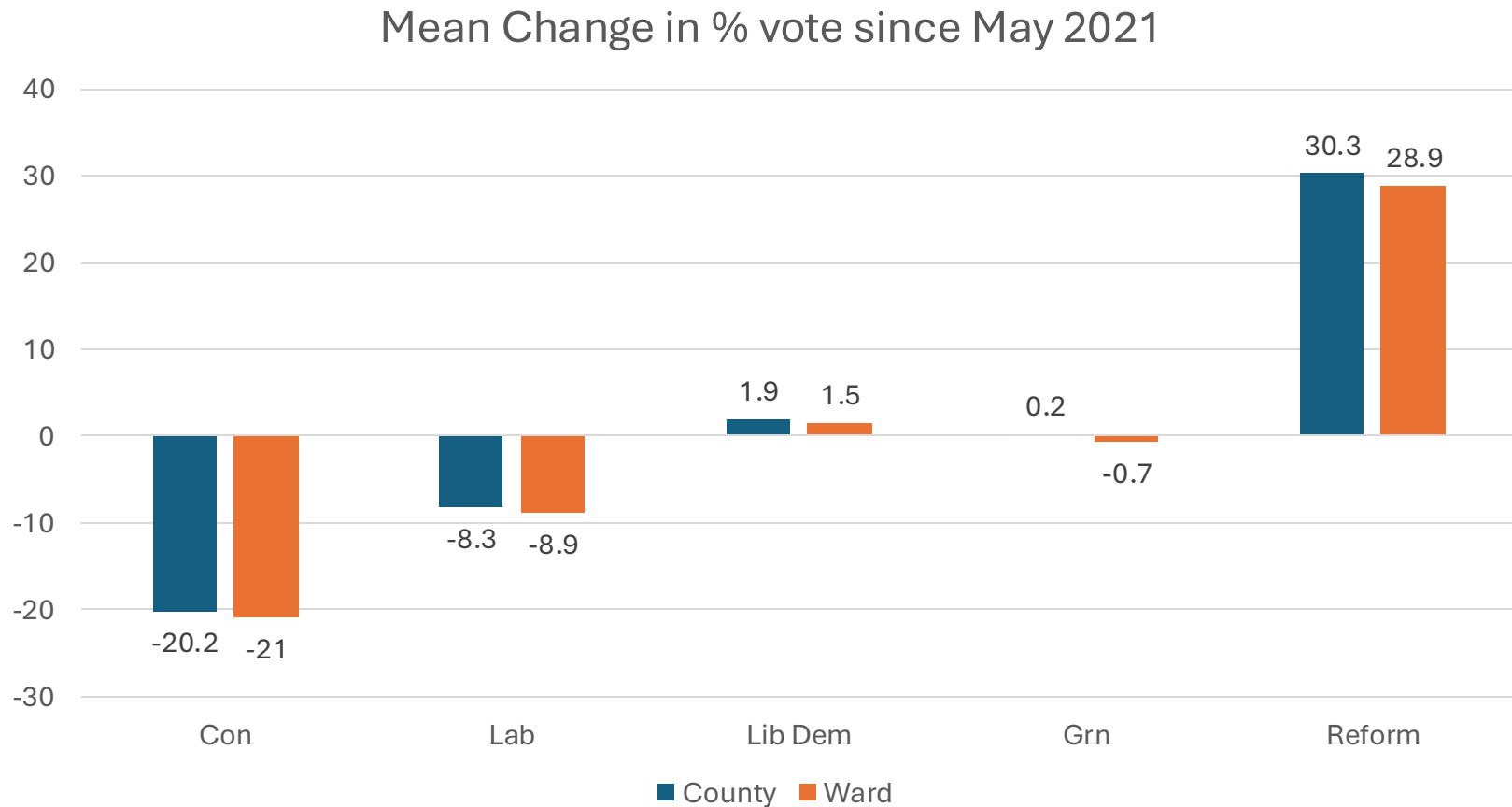
Analysis by Patrick English, Robert Ford, Steve Fisher, Lotte Hargrave

Overall Share of Vote 2025



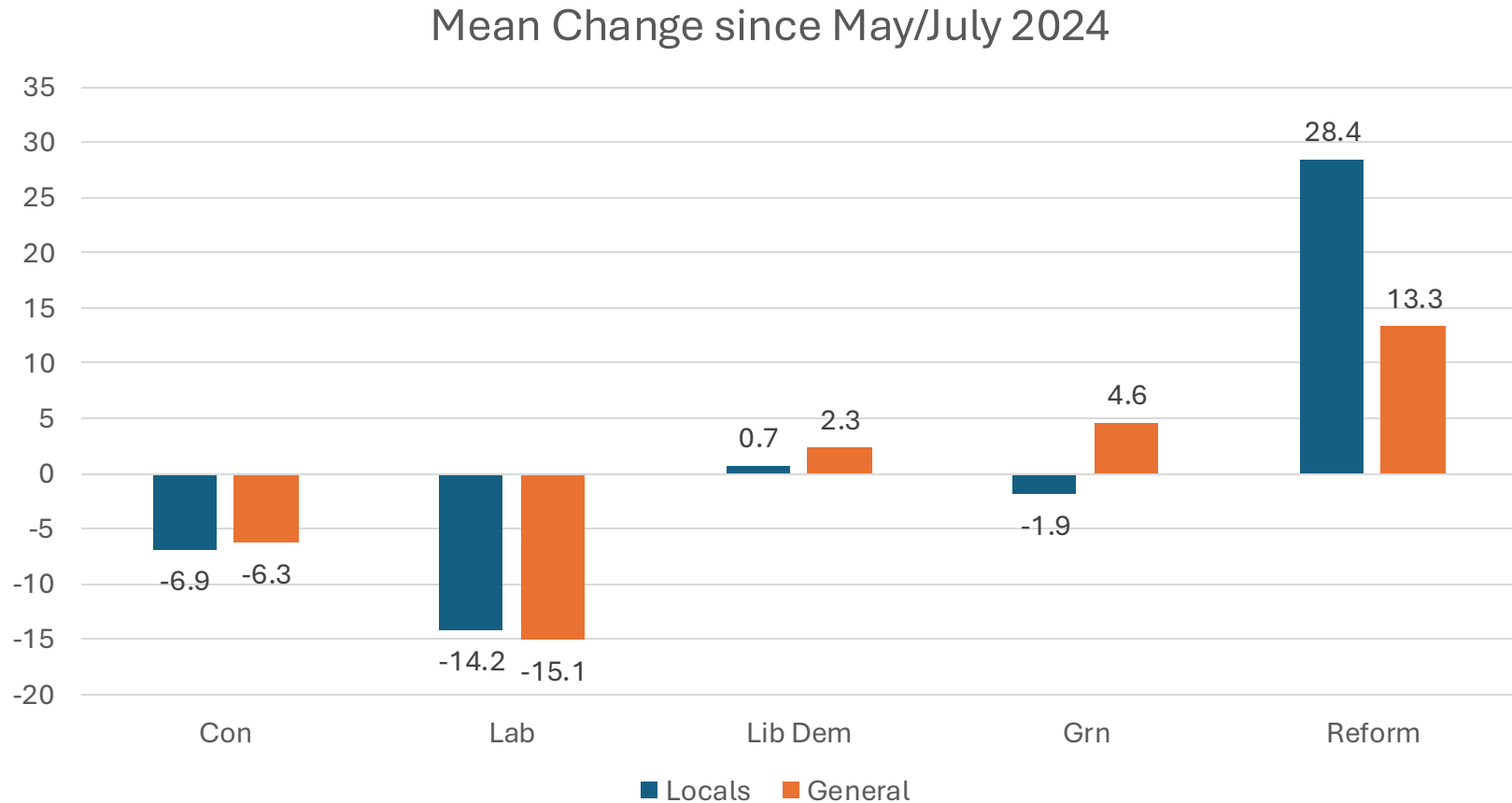
Source: BBC. Based on all 1,399 local council wards polling

Change since 2021



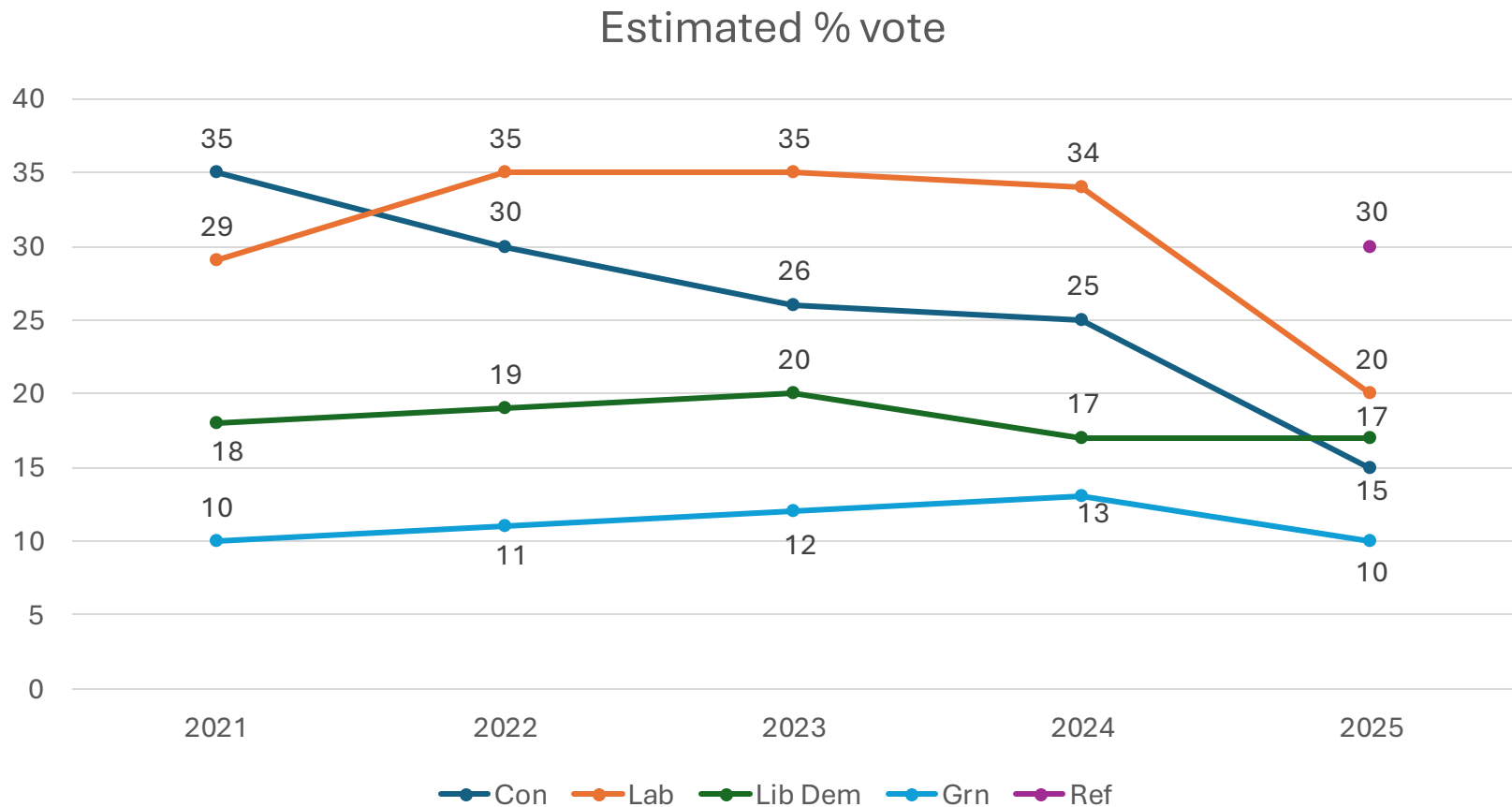
Ward is based on all wards with unchanged boundaries fought by Con, Lab and Lib Dem in 2021 & 2025. (Green figure only based on wards they contested both times. Reform figure based on all wards fought in 2025 and comparison is with Reform+Ukip in 2021.)

Change since 2024



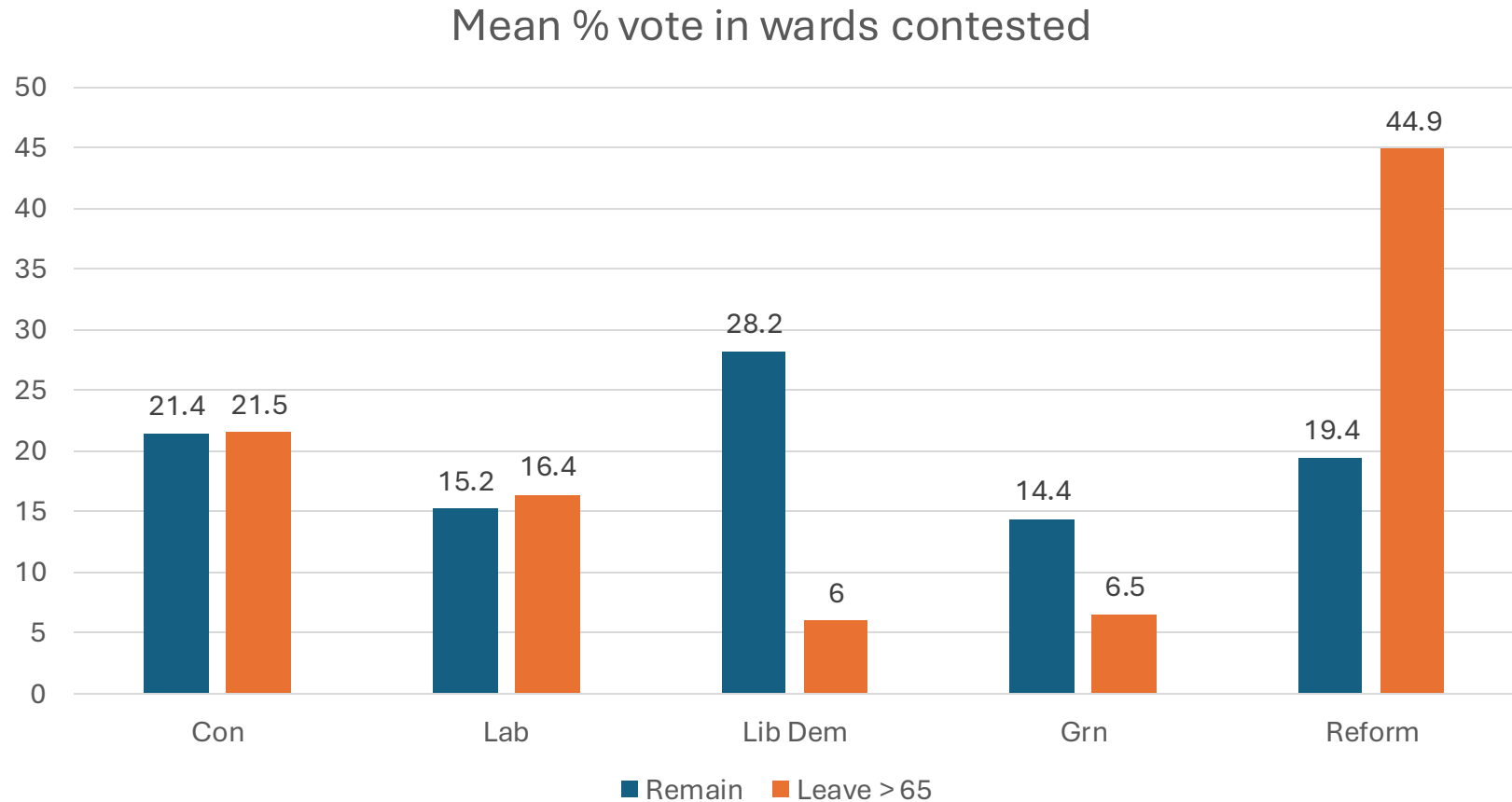
Locals: Mean change in overall share of vote in 15 district councils with elections in May 2024. General: Weighted average across 15 areas containing 51 constituencies where ward and constituency boundaries map and where there was at least close to a full pattern of candidates. Includes 2 mayoral contests in Cambridgeshire & Hull.

Summary of Recent Local Election Performance



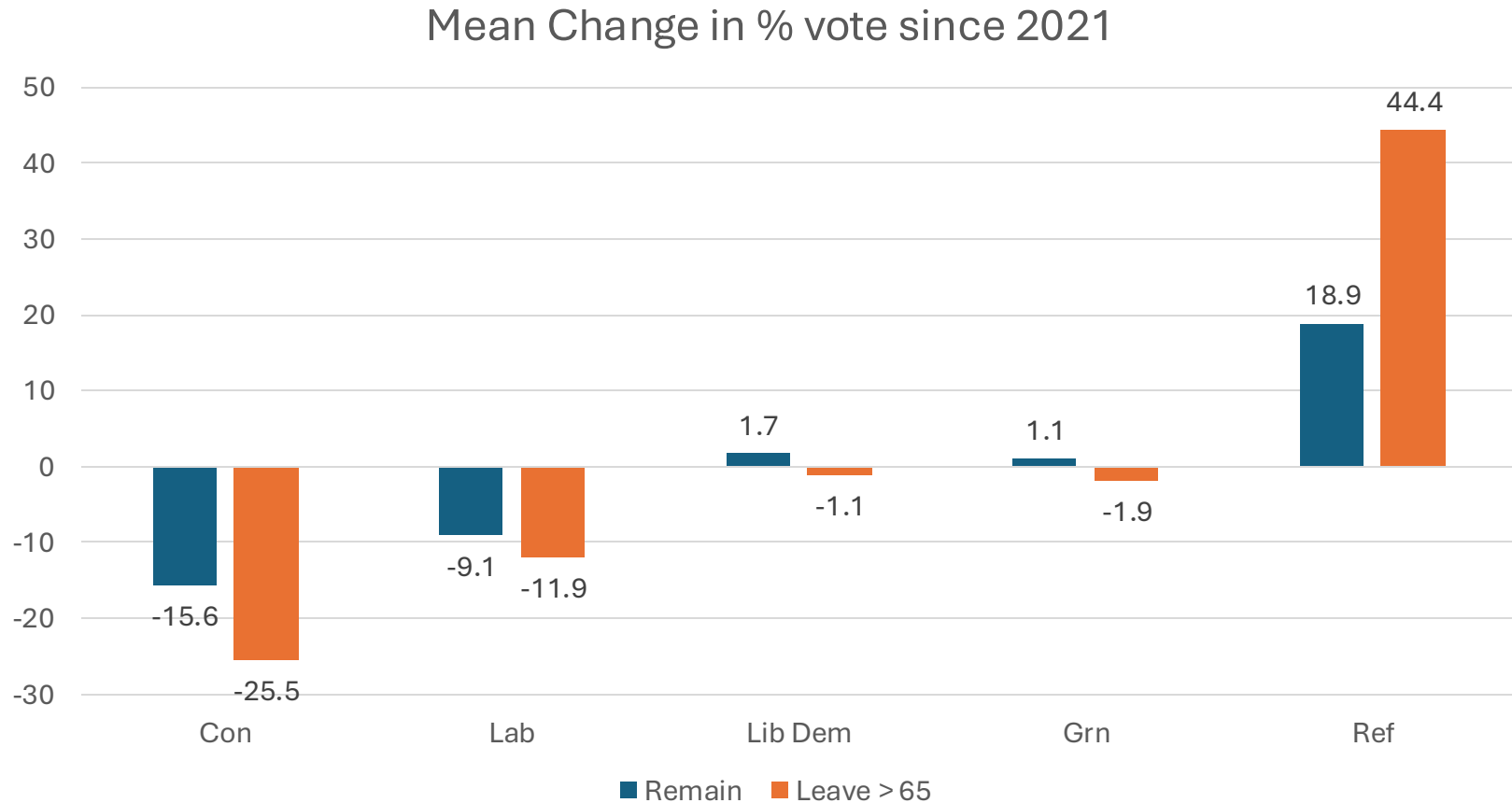
Source: BBC Projected National Share. 2021 figures are for county elections over. Figures for 2025 subject to revision.

The Brexit Divide



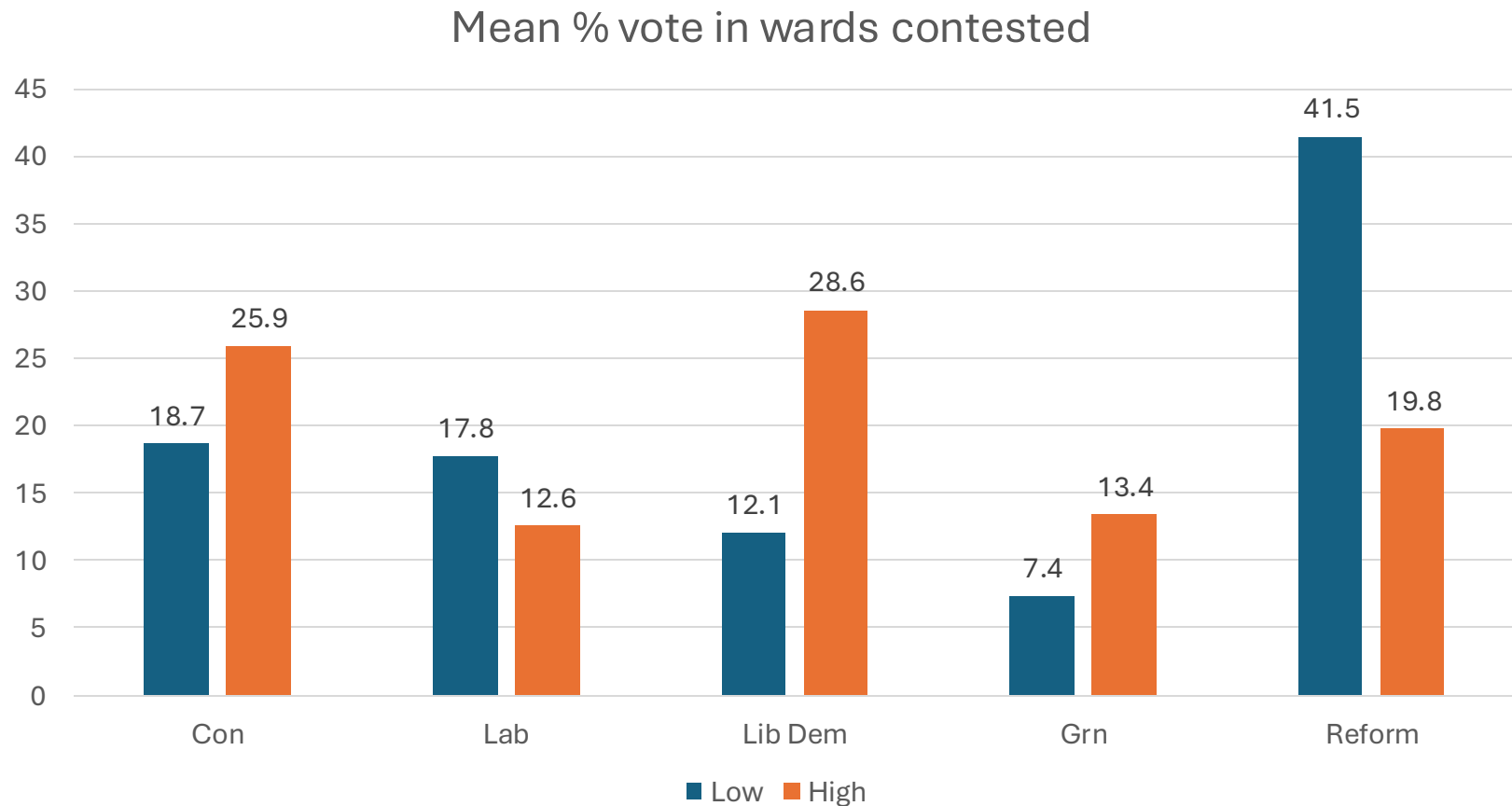
Remain: Estimated Leave share in ward in 2016 < 50%. Leave > 65: Estimated Leave share in ward in 2016 > 65%.

Change Since 2021



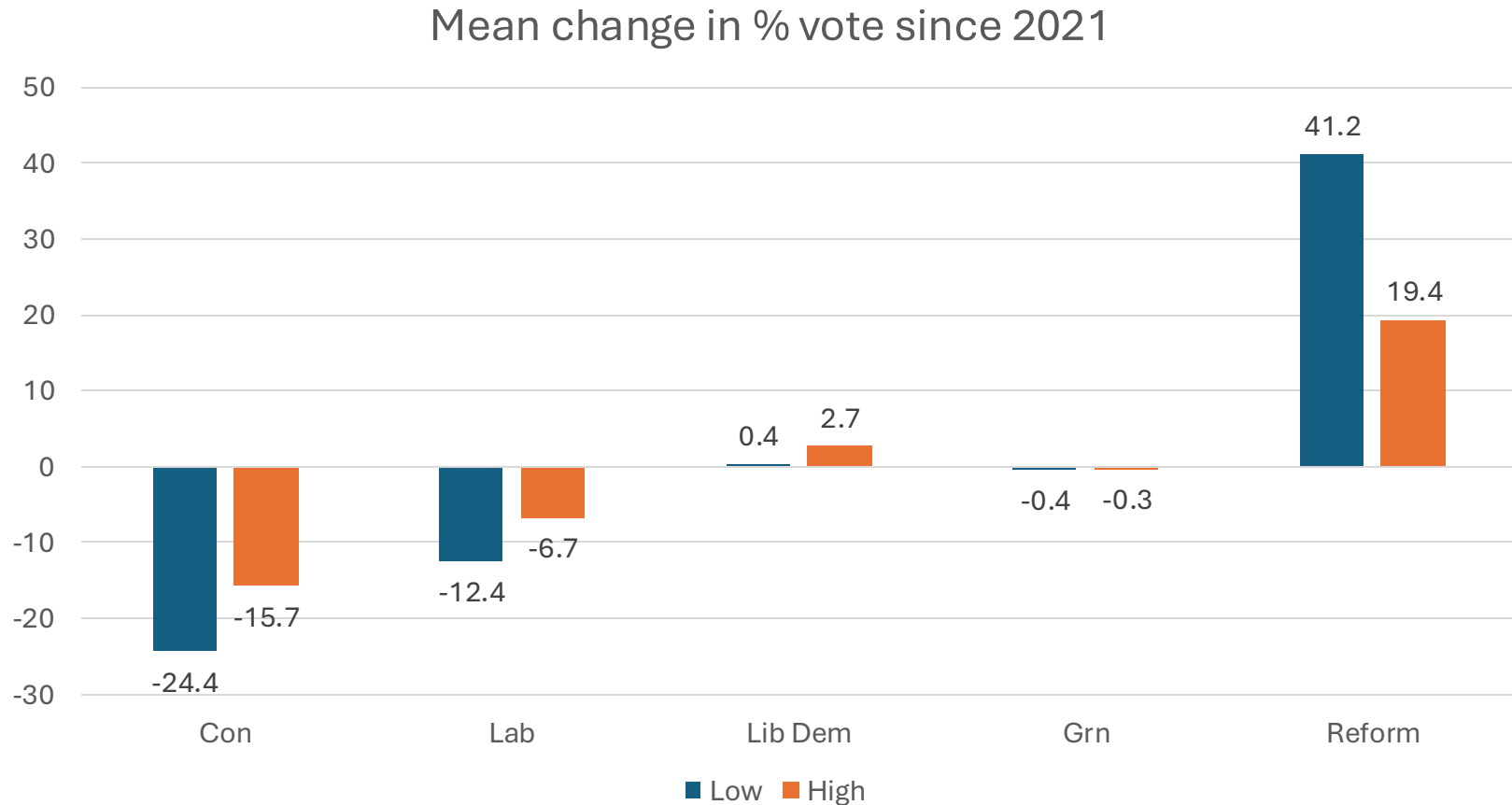
For all but Reform figures based on all wards with unchanged boundaries contested in 2021 & 2025. In the case based on all wards contested in 2025 irrespective of whether ward fought in 2021. See also previous slide.

The Education Divide



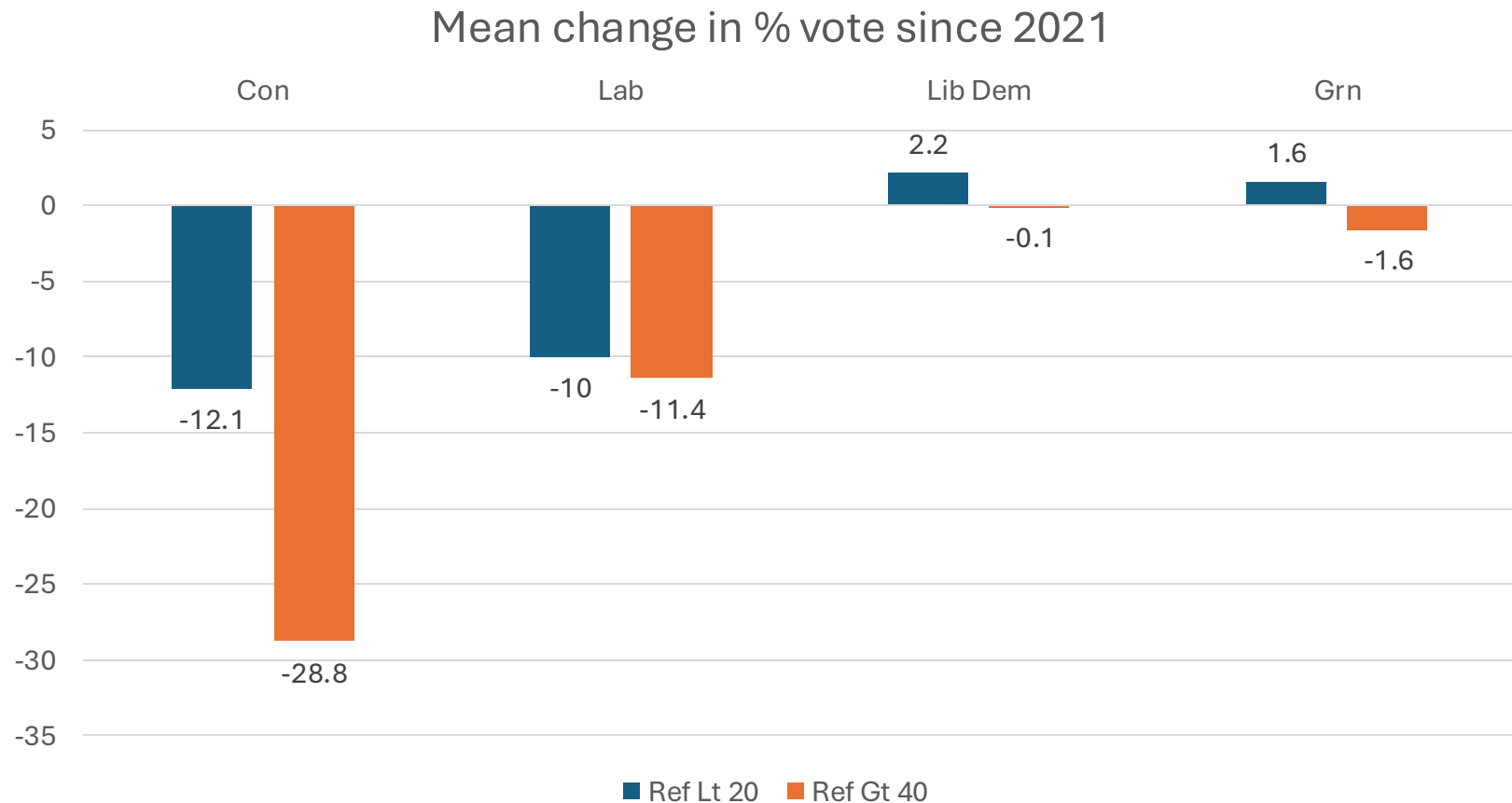
Low: < 25% with degree. High > 40% with degree (Data not available for 264 wards)

How It Changed Since 2021



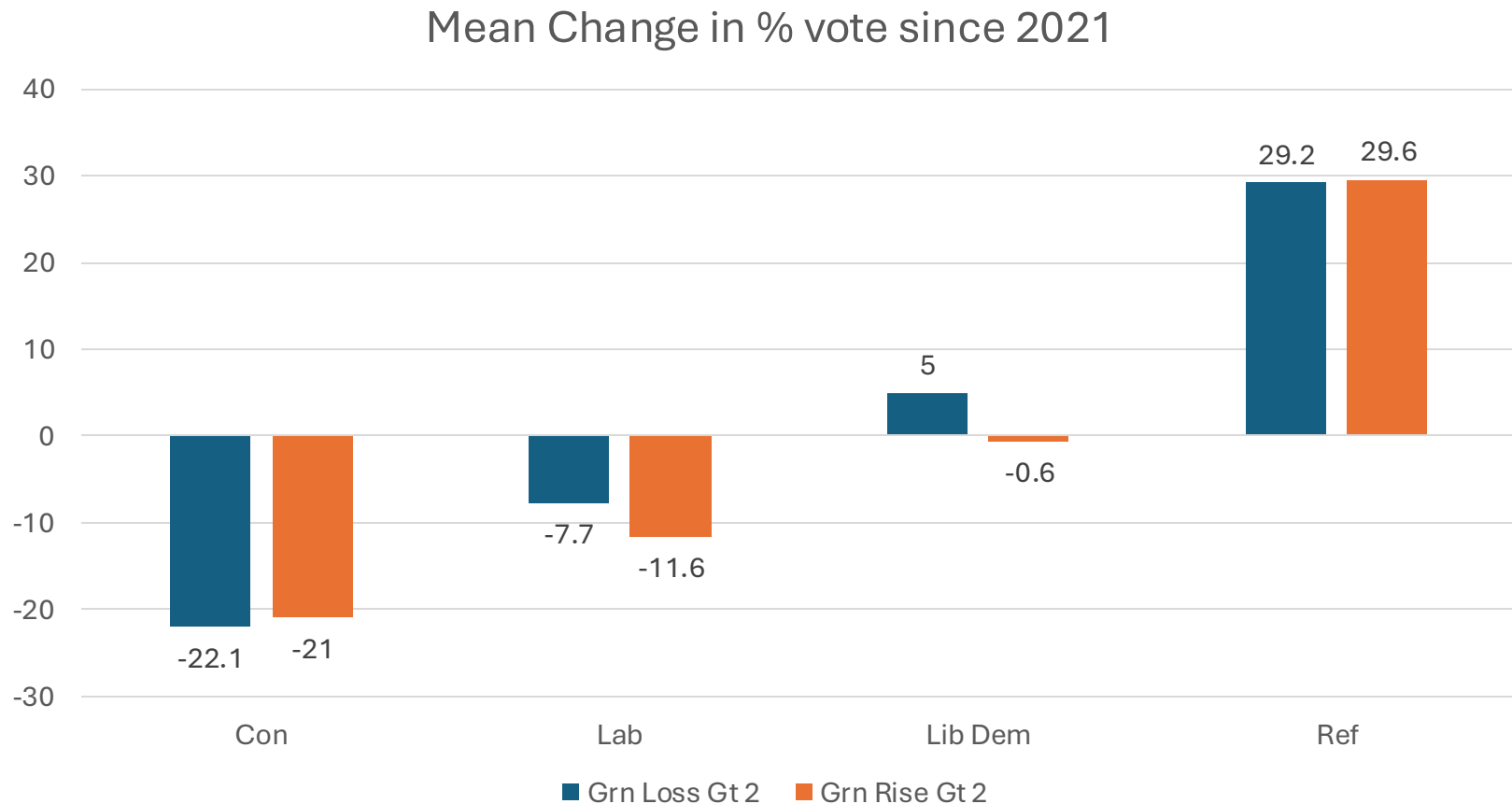
See notes to 2 previous slides

Who Lost Out When Reform Did Well?



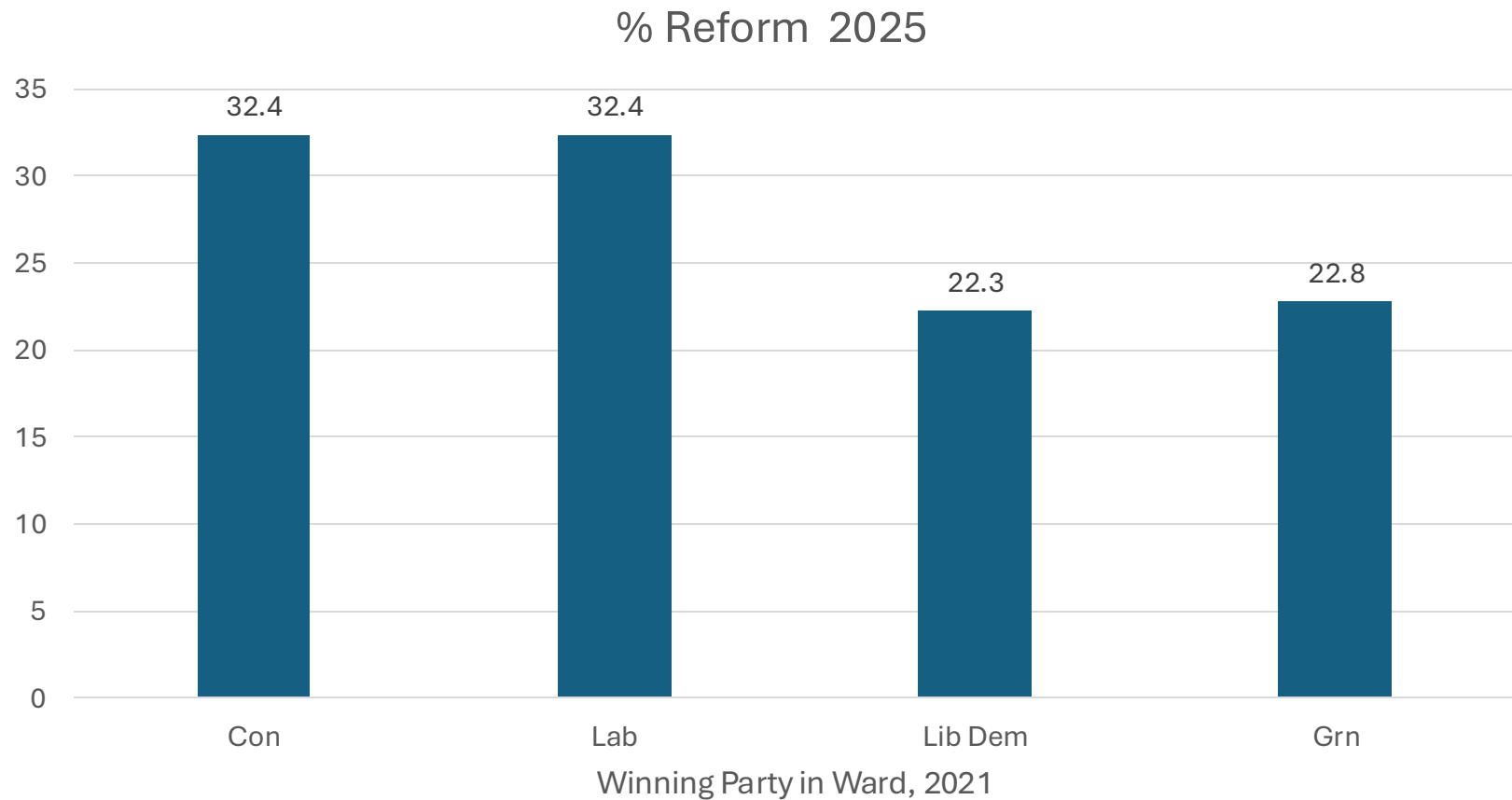
Ref Lt 20: Reform vote up < 20pts on 2021, irrespective of whether seats fought in 2021. Ref Gt 40. Reform vote up > 40 pts. See also note to slide 7.

Whereas In The Case of the Greens....



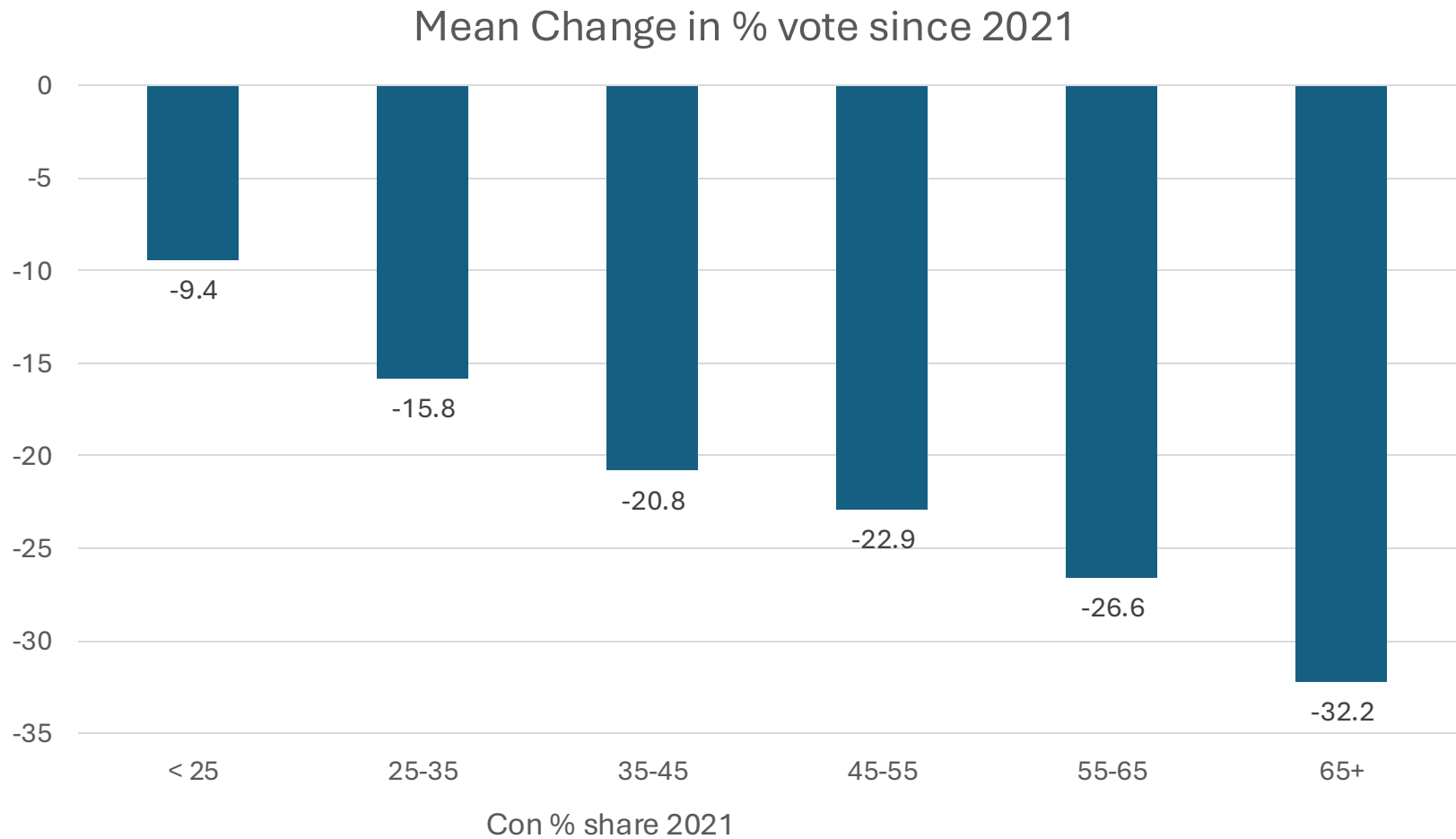
Grn Loss Gt 2: Green share of vote down 2pts or more since 2021, irrespective of whether Greens fought ward in 2021.
Grn Rise Gt 2: Green share up more than. 2pts. See also note to slide 7.

A Crucial Consequence



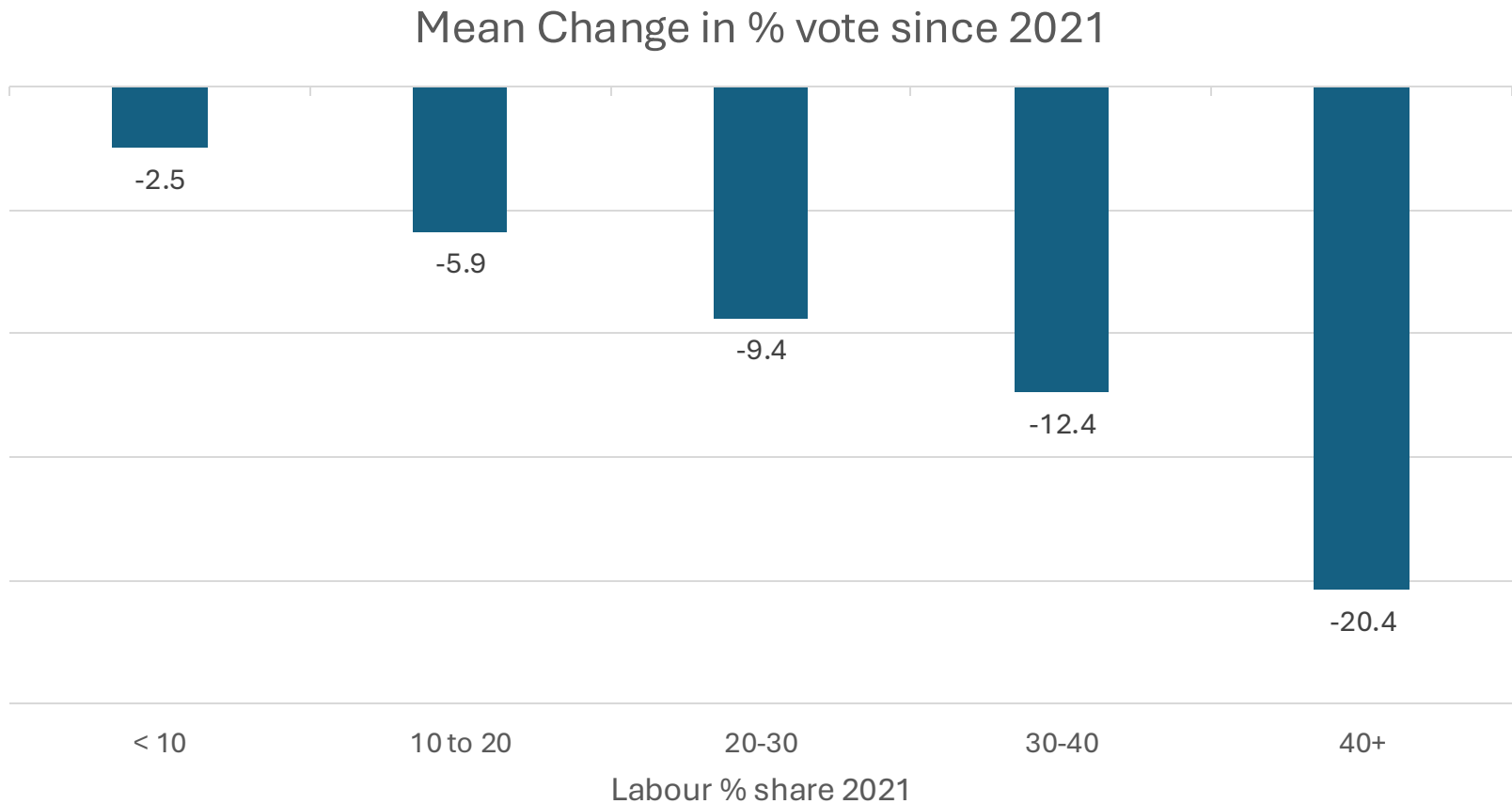
In wards with boundary changes, winning party in 2021 is as estimated by Colin Rallings and Michael Thrasher

Pattern of Vote Loss - Conservatives



Con support fell on average by 25.1 points in wards it was defending, but by 15.9 points where it was not. See also note to slide 7

Pattern of Vote Loss - Labour



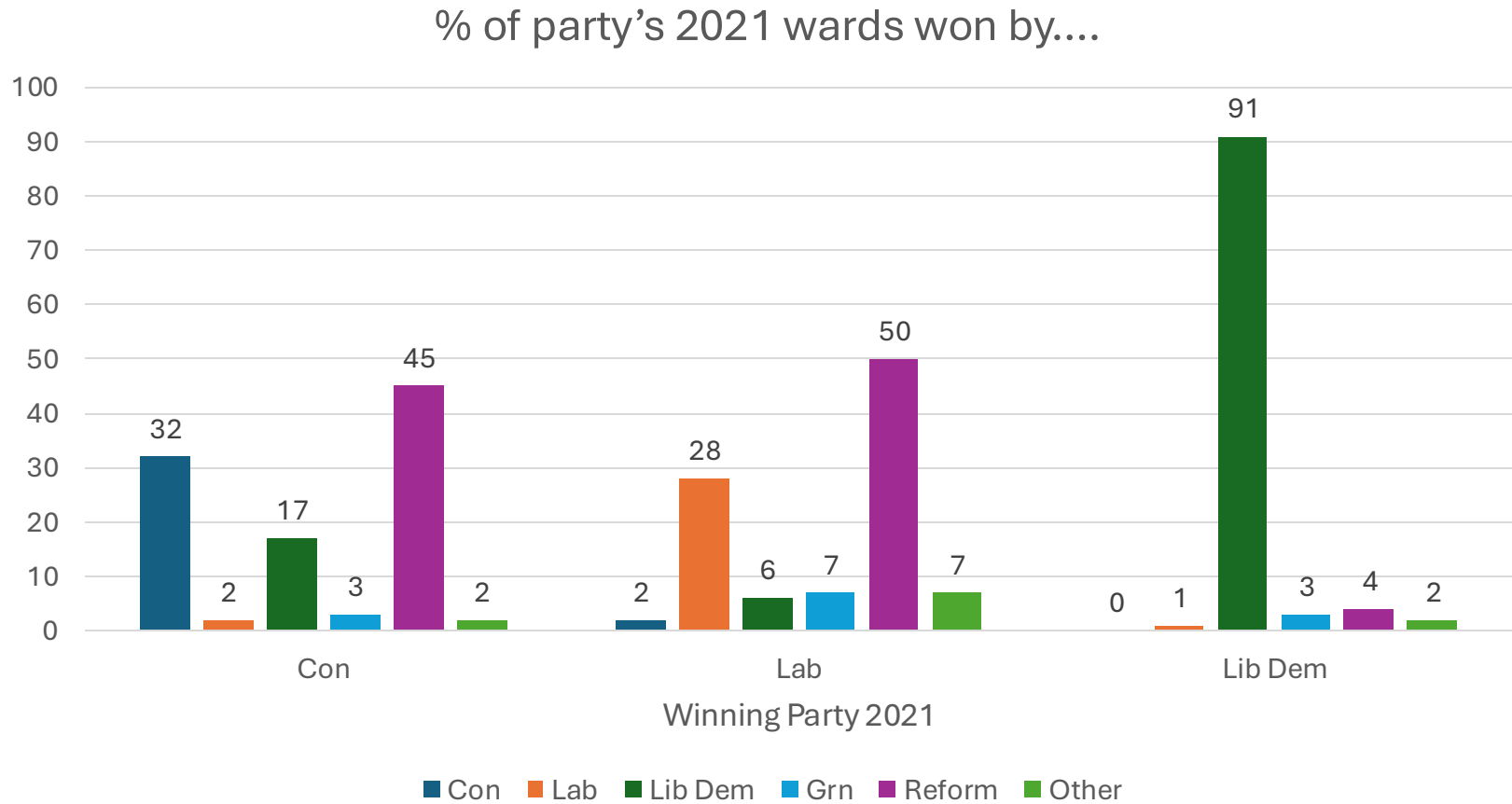
Lab support fell on average by 19.3 points in wards it was defending but by 7.4 points where it was not. See also notes to slide 7.

Little Sign of Anti-Con or Anti-Lab Tactical Switching

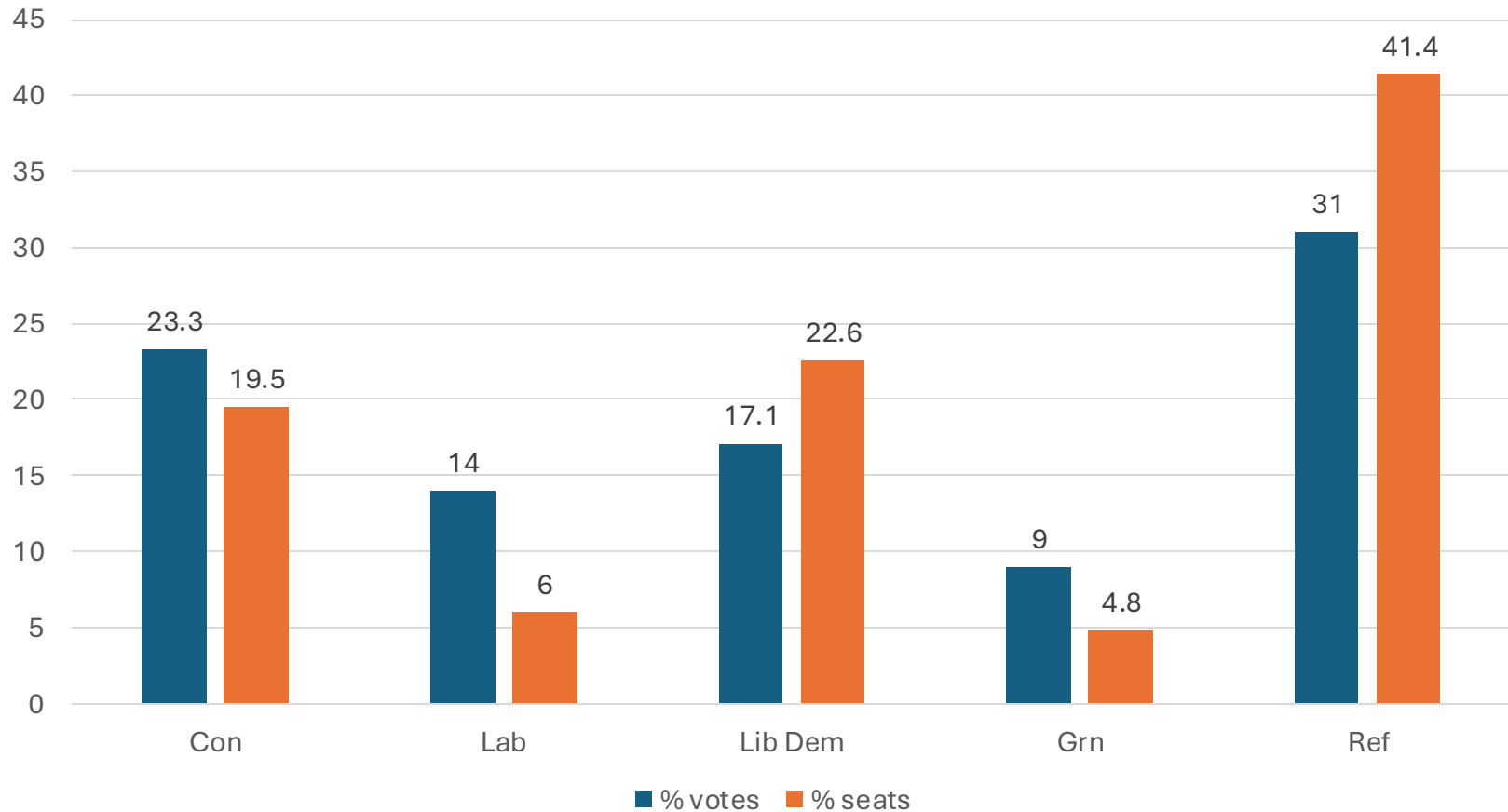
| 1 st /2 nd 2021 | Con Change | Lab Change | Lib Dem Change |
|---------------------------------------|------------|------------|----------------|
| Con/Lab | | -10.5 | +2.5 |
| Con/Lib Dem | | -5.7 | +2.7 |
| | | | |
| Lab/Con | -18.1 | | +2.3 |
| Lab/Lib Dem | -7.1 | | -1.3 |

See note to slide 7.

Pattern of Seat Turnover



Who Benefits from FPP Now?



Standard deviation of party support across wards: Con 12.3; Lab 10.5; Lib Dem 16.8; Grn 10.3; Ref 11.1. Reform % seats > % votes on 16 councils, Lib Dem 12; Con 5; Grn 2; Lab 1

Fragmentation

- On 6 councils, 5 parties won $> 10\%$.
 - On 4 more, 4 parties did so
- On 8 councils, 3 parties won $> 20\%$
- 45% of all council wards (and over half of those won by Con & Lab) won by majorities of less than 10%.
- Nearly a quarter of all wards (23%) won on less than 35% of vote
 - Only 15% by more than 50%
- Average winning share in mayoral elect = 32.3%

Summary

- The foundation of Reform's success was (further) cornering the pro-Brexit Johnsonian coalition that delivered the Conservatives victory in 2019
- Winning that key market – together with Labour's wider unpopularity – enabled the party to win votes and seats in Lab held wards too
- FPP boosted Reform's success, not least because both Con & Lab lost ground more heavily in wards where they were strongest
- Reform posed much less of a threat to the Lib Dems (and Greens) who also benefited from FPP