

Ready for change:

**Voter opinions,
experiences and hopes in
the UK**

About this research

Survation undertook this research on behalf of 38 Degrees. Fieldwork was carried out between 21st August and 1st September 2025 on a population of 8,546 residents aged 18+ living in the UK. The survey was conducted online with differential response rates from different demographic groups taken into account. Data were weighted to the profile of all adults in the UK aged 18+.

Using Multilevel Regression and Poststratification (MRP), Survation is able to use this large dataset to produce estimates of opinion and attitudes for small defined geographic areas. More information about MRPs is available at survation.com/what-is-mrp.

Margin of Error

Because only a sample of the full population was interviewed, all results are subject to a margin of error, meaning that not all differences are statistically significant.

For example, in a question where 50% (the worst-case scenario as far as margin of error is concerned) gave a particular answer, given the sample of 8,546, it is 95% certain that the 'true' value will fall within the range of 1.06% from the sample result.

All polls are subject to a wide range of potential sources of error. On the basis of the historical record of the polls at recent general elections, there is a 9 in 10 chance that the true value of a party's support lies within 4 points of the estimates provided by this poll, and a 2 in 3 chance that they lie within 2 points.

Foreword



**Matthew
McGregor**

CEO, 38 Degrees

Two years ago, constituency polling 38 Degrees launched ahead of an impending General Election showed Labour on a clear path to victory. It also showed voters desperate for change in their lives, and a clear message that the election would be fought on two issues: the NHS and the cost of living.

A year on from that General Election, 38 Degrees commissioned Survation to run polling to look at the same picture now. What are the issues people want their politicians to prioritise? What actions will increase their confidence in the government? And how are things feeling for them right now?

Against a political and media backdrop in recent months dominated by immigration, with scenes of division and distrust filling our screens and newspaper pages, it would be easy to assume that voters' prime and most pressing concern is immigration. But that is not what our research shows. Voters told us that the areas they most urgently want to see action on are the NHS, followed by the cost of living, and then immigration. Indeed, in 345 constituencies NHS was the top issue for voters, versus cost of living in 268 seats and immigration in just 17 seats.

Nobody can dismiss the idea that immigration is high on many voters' minds. However, research from focus groups to polling we have conducted in recent months suggests a bigger story. Our polling shows that in 92% of constituencies more people feel worse off than better off or the same as last year. Getting to the root of this issue, by ensuring people reach the end of the week or month with enough cash left over to live a little, is one of the clearest ways to signal to voters that things are changing for the better.

As part of the research we are publishing today, 38 Degrees and Survation have also identified five new voter groups who form a 'progressive majority of the electorate' and therefore a path to victory if a party is able to persuade them to lend their vote. These groups have varied outlooks on immigration, but this isn't the dominant factor in how they will vote. Bold action on improving our NHS, ensuring people have more money in their pocket and a growing economy are what matter to them. And crucially, a sense that a party has the bold ambition needed to really make the changes to improve all our lives.

38 Degrees is a community of a million people, living in every constituency across the country. Our supporters vote for all parties and none. Like the voters polled here, there are many policies the government has brought in which they welcome. But just like the rest of the country, they are crying out for change to come faster – whether that's being able to see an NHS dentist, or having enough cash for a takeaway on a Saturday night. Change must come – and we'll keep banging the drum for that change to be delivered harder and faster.

The cost of living

Compared to this time last year, which of the following statements is closest to your experience?



I feel worse off overall - I am finding essentials/bills less affordable and I am cutting back more

43% nationally



About the same overall - I don't feel better or worse off

29% nationally



I feel better off overall - I am finding essentials/bills more affordable and I am cutting back less

24% nationally

The National Picture

- ▶ Across the country, a majority of voters in 582 constituencies (92%) say they feel 'worse off' than they did a year ago.
- ▶ Just four constituencies report feeling 'about the same' whilst 46 constituencies feel 'better off'. Notably, in 36 of these 50 'better/same' constituencies, 'worse off' is still the second-highest ranking.
- ▶ This suggests almost a national consensus on this issue - people are feeling worse off overall. They are struggling to afford daily essentials, bills, and are cutting back more.

Levels of Trust

To what extent, if at all, do you trust or distrust each of the following?

- ▶ Local MP: +6 net trust
- ▶ Local Councillor: -1 net trust
- ▶ The Media: -8% net trust
- ▶ Corporate CEOs: -12% net trust
- ▶ Members of the House of Lords: -16% net trust
- ▶ MPs: -17% net trust
- ▶ The Prime Minister, Keir Starmer: -19% net trust
- ▶ UK Government, currently Labour: -20% net trust
- ▶ Social Media Influencers: -28% net trust



Britain's Progressive Majority: The Five Groups

Detailed analysis undertaken by Survation on behalf of 38 Degrees in August 2025 found there are five groups of progressive voters whose votes together make up a majority of the country. Below we profile these groups, and the issues and values that matter most to them.

Open-hearted collectivists (25%)

Strongly pro-immigration, community-minded

- ▶ Age: older demographic profile, skewing towards the mid-50s
- ▶ Most likely to vote in local elections
- ▶ NHS: consistently see the NHS as a more important issue than the national average
- ▶ 58% of the group cite being able to access NHS care more quickly as an action that would improve their confidence in the current government (+15 on the national average)
- ▶ Cost of living: slightly more likely to rank the cost of living in their top two issues for seeing progress on
- ▶ Immigration: 98% believe immigration is good for life in the UK and 76% believe the UK benefits from immigration even if it changes the make-up of communities



Guarded Localists (19%)

Cautious on immigration, focused on national cohesion, think politicians should primarily focus on domestic issues

- ▶ Age: concentrated in the 25-55 bracket
- ▶ The second most likely group to trust their MP (56%)
- ▶ Economy: 70% said that feeling better off financially would make it more likely for them to change their support
- ▶ NHS: slightly below the national average when they rank the NHS in terms of their priorities, but 72% cite improving the NHS as making them more likely to change their vote - the highest of all groups
- ▶ Immigration: roughly two-thirds cite that immigration was bad for UK culture and way of life (65%) and bad for the UK economy (63%). 62% associated more with reducing immigration, whilst 39% still supported immigration on the basis of the benefits they believe it to bring



Methodology

This segmentation is drawn from a nationally representative survey of 8,500 UK adults conducted by Survation in August 2025 on behalf of 38 Degrees. From this, 4,594 respondents were identified as part of the "centre-left universe" - defined as those scoring 7-10 on likelihood to vote for at least one progressive party (Labour, Liberal Democrats, Green, SNP, or Plaid Cymru).



Pragmatic Youth (28%)

The youngest group, moderate and middle-ground in most views

- ▶ Age: twice as many 18-24 year olds as the progressive average, with very few over 50s
- ▶ More likely to lean towards strong leadership in progressive movements
- ▶ Immigration: 56% believe immigration is good for life in Britain vs 44% who say it is bad
- ▶ NHS: Broadly in line with the national average, with 40% placing it in their top two issues for the government to make progress on.
- ▶ Cost of living: along with Guarded Localists, they are one of the two groups that deprioritise cost of living. Just shy of a third (30%) have the issue as being in their top two for the government to make progress on (-9 compared to the national average).
- ▶ Economy: They favour economic growth over green policies. They care more about feeling better off individually than the state of the economy as a whole, with 73% saying that feeling better off would make them likely to change the party they support



Rooted Traditionalists (16%)

The oldest, and most economically insecure group, living away from big cities. Economically on the left but socially conservative

- ▶ Geography: concentrated in the South East, South West, and Scotland, but with very little presence in London
- ▶ They tend to dislike most political parties and have little trust in politicians
- ▶ NHS: Rooted traditionalists are up there with Open-hearted Collectivists in caring about the government making progress on the NHS: 49% have it as a top two issue (+9 vs national average)
- ▶ 51% said accessing the NHS more quickly would improve their confidence in the current government (+8 vs national average)
- ▶ Cost of living: along with Open-hearted Collectivists, they put the cost of living as a top two priority for the government to make progress on.
- ▶ Immigration: 98% believe it's bad for life in the UK overall and 87% say the UK should reduce immigration, even if that changes the make-up of communities
- ▶ 54% define themselves primarily by national identity



Cosmopolitan Optimists (12%)

Urban, highly educated, affluent, pro-state and optimistic about the future

- ▶ Geography: regionally concentrated in London and the North West
- ▶ Highly internationalist in outlook, more willing than other groups to see individual freedoms limited for the greater good.
- ▶ Immigration: 90%+ say that immigration is good for the economy, culture, and public services
- ▶ 50% strongly favour renationalising railways (vs 24% national average). 47% strongly favour taking over British Steel vs 24% national average.
- ▶ NHS: least likely of the groups to rank the NHS as an area for the government to make progress, but most likely to say that being able to access the NHS more quickly would improve their confidence in the government
- ▶ Cost of living: Similar to the national average, 38% place the issue in their top two for the government to make progress on and 61% have it as a top three issue facing the country, but most likely to say that they feel better off financially compared to last year
- ▶ Economy: the most likely group to say that growing the economy would increase their confidence in the government (68%)

Labour's Policies Since the Election

When asked their opinion of a list of policies brought in by Labour since the general election, on average the public had a net positive rating of nine of them:

To what extent, if at all, do you approve or disapprove of each of the following government actions?

Approve Neither Approve or Disapprove Disapprove Don't Know/Haven't Heard

Introducing stricter regulations on sewage pollution



Introducing tougher immigration and asylum laws



Increasing NHS spending



Increasing the minimum wage by 6.7%



Expanding free school breakfast clubs



Strengthening workers' rights



Retaining the pensions triple lock



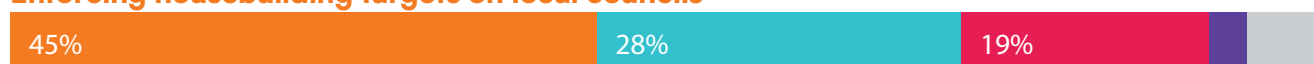
Taking control of British Steel



Renationalising railways



Enforcing housebuilding targets on local councils



Restricting eligibility for the Winter Fuel Allowance



Reducing disability benefits



Raising the £2 cap on bus fares to £3



Increasing Confidence in the Current Labour Government

Which of the following, if any, would most increase your confidence in the current government?

Being able to access NHS care more quickly (e.g. GP appointments or surgery)

43%

Seeing immigration numbers fall

39%

Growing the economy

38%

Having more money in my or my family's pocket

36%

Fewer pensioners struggling to make ends meet

27%

Local services improving where I live (e.g. public transport, bin collection, community support)

20%

Big businesses paying their fair share and facing tougher penalties for breaking rules

20%

None of these - my confidence wouldn't change

10%

Don't know

3%

Something else

1%

Analysis

Along with the NHS and immigration, it's notable that three of the five top answers to this question all relate to the cost of living and the economy.

Looking to the Future

Looking ahead to the next general election, which of the following changes would make you more likely to change the party you usually support, or to support a party you don't normally vote for?

■ Approve ■ Neither Approve or Disapprove ■ Disapprove ■ Don't Know

Immigration being handled better



Having an improved experience with the NHS



Feeling better off financially



Feeling more optimistic about the future



Feeling more trust in politics and politicians



Analysis

Whilst immigration is significant across these questions and cannot be ignored, it should not be allowed to become the dominant issue subsuming all others. The NHS, cost of living, and feeling better off all rank highly (and in many cases rank higher than immigration).

Showing bold, ambitious progress on the cost of living and the NHS - and delivering this in a way that voters can clearly see and feel in their own lives - is as important today as it was before the election, and reflects the change so many voters across the country are crying out to see.

The State of our NHS

Based on your experience, how would you describe the current overall state of the NHS?

Excellent

9%

Improving

27%

Struggling

49%

Not Fit For Purpose

11%

Don't Know/Not Relevant

4%

Analysis

156 constituencies record 'improving' scores above the 27% national average, compared with just 79 where 'struggling' exceeds its 49% average. This suggests optimism clusters in pockets - inner London, university towns, knowledge-economy seats - while pessimism is more evenly spread across the country. In other words, positive sentiment

is localised; negative sentiment is a broader national baseline with fewer extreme outliers.

In focus groups run by 38 Degrees, improvements in being able to get a GP appointment have been raised unprompted by participants.

About 38 Degrees

38 Degrees is a community of a million people who - in a moment away from their busy days - take small actions on issues they care about, which all add up to something bigger, a movement for a better Britain for everyone who calls our country home.

With supporters in every UK constituency, we come from all walks of life; we're nurses, taxi drivers, parents, shopkeepers, pensioners and more.

With on and offline campaigning technology, a creative and dedicated staff team and a people powered movement, we work to change lives, communities and our country. By coming together we can have an impact far greater than any of us could achieve alone.

Whether it's the grieving wife who forced the Government to review betting laws after the tragic loss of her husband to gambling-related suicide, or the 1.2 million of us who pressured Paula Vennells to hand back her CBE and in doing so helped turbo charge the sub-postmaster's campaign for justice. Every time we win, we move our country a step towards the fairer, more sustainable place we're fighting for, where we are treated - and treat each other - with respect.

Working with 38 Degrees

As a politically neutral organisation, 38 Degrees works with MPs across different parties on the issues we care about together.

In 2025 MPs including Louise Haigh, Stella Creasy and Clive Lewis launched their own petitions on our free 'Campaigns By You' platform, with

hundreds of thousands of members of the public backing their campaigns as a result.

To find out more, or to discuss launching your own petition via Campaigns By You, contact us on publicaffairs@38degrees.org.uk

38Degrees people power change

38degrees.org.uk