



Public Opinion

# R&D in a shifting voter landscape

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## About this report

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This report explores how changes in the UK's political landscape could impact research and development (R&D) using quantitative and qualitative research. It builds on CaSE's extensive public attitudes programme and the wealth of expertise across the R&D sector.

CaSE thanks the many organisations and individuals who contributed to the project, and the agencies which delivered the research: Icaro, Brook Lyndhurst and The Social Agency. We also thank the public participants for their contributions in the qualitative and quantitative research.

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## Foreword

**The UK's political landscape has shifted dramatically since the 2024 General Election.** The familiar dynamics and dividing lines of British politics have given way to a fragmented landscape. We started this project to generate insights that could help advocates navigate this unfamiliar terrain.

Our findings show that voters feel united in their pessimism about society, but not in their view of who or what is to blame. Many have grown frustrated with institutions that don't appear to deliver solutions, with attitudes shifting from scepticism to outright contempt.

Against this backdrop, the R&D sector finds itself in a fragile position. On the surface, this report offer reassurance – support for Government investment in R&D remains broad and never drops below a majority for any voter group. However, this support is shallow. The public struggle to see how R&D benefits their daily lives or addresses their immediate priorities. Without a personal connection, this instinctive positivity is unlikely to survive a change in the political wind.

This report points towards actions we can take, but the clock is ticking. We have precious few years before the next General Election – a moment where voting intention crystallises into actual votes.

As a sector we must change both how we engage and how we act. Yes, we must convey a stronger story – flipping the pervasive "Broken Britain" narrative and positioning R&D as a shared source of hope. But we must also invest the time, energy and humility needed to renew our sector's contract with society – even if this means changing the practices and incentives at the heart of the R&D system. Doing so offers our best chance of converting shallow public support into something that feels deep-rooted and personal.

**When scoping this project, we resisted the temptation to lead with R&D.** Instead, the qualitative fieldwork that anchors the study begins somewhere else entirely: with people's daily lives, their local area, their hopes for their families, and their politics. R&D is introduced only once those foundations are in place. That sequencing matters. Rather than asking people what they think of a policy area in the abstract, we can see where – if at all – it connects to the things already occupying their attention.

The findings offer reassurance but also a challenge. R&D instinctively feels like a "good thing"; but that sentiment is a default, not something people have reasoned themselves to. To build something more resilient, R&D advocates must start from where people are. R&D must offer solutions to problems that matter to them, it needs to be relatable and – above all – it needs to capture the imagination.

From a methodological perspective, a mixed methods approach has proven invaluable. The qualitative research allowed us to get under the surface of issues and hear real people talking about their real lives, concerns and aspirations. Alongside this, being able to return to a data set as rich as CaSE's tracker study – Public Attitudes to R&D 2025 – and interrogate it with another lens shows the value of collecting such data proactively and at regular intervals. We have then built on that data with a new quantitative survey, focussing on how the landscape is shifting.

Together, these insights offer a genuinely three-dimensional picture. I hope it proves as useful as it was interesting to produce.



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## Introduction

CaSE works to champion research and development (R&D) as a political and societal priority that can transform lives and livelihoods. R&D tackles major societal challenges, grows our economy and creates jobs and opportunities for people of all ages. But it can only deliver these impacts with supportive decisions from policymakers.

We cannot expect those supportive decisions without public support; this is our sector's social license to operate. Earning and maintaining public support means listening to the views of people across society, and engaging respectfully, openly and meaningfully.

In the years since the 2024 General Election, the UK's political landscape has visibly fragmented. Five parties now regularly poll at greater than 10%, influencing everything from the composition of parliaments and local authorities, to party policies and priorities.

This fragmentation is driven by cultural and societal changes that have been unfurling for at least a decade. These have moved the points of political cleavage away from class and towards culture, and public trust in governments, public institutions and politicians has moved from scepticism towards contempt.

British politics has shifted from the predominantly two-party system towards two voting blocs, albeit with porous edges rather than sealed walls. In this new system, parties are evolving their policies and rhetoric to solidify their voter bases and appeal to swing voters – leaving the familiar dynamics and dividing lines behind.

Although things remain in flux, those who support, communicate and advocate for R&D need to understand and respond to the causes and symptoms of these changes.

CaSE's latest project, R&D in a Shifting Voter Landscape, aims to help the R&D community navigate this fragmented landscape and prepare for a future where longstanding cross-party support for R&D breaks down.

This means doing things differently – but if we don't adapt to our new reality, we risk losing touch with the public and struggling to keep policymakers on side.

This project aims to provide robust evidence on what's driving public attitudes, and how R&D does, or should, fit into this new political conversation. Delivered by CaSE's research consortium and with input from more than 30 organisations across the sector, the project combines existing evidence and new qualitative and quantitative research across four phases:

**1****Review of external research**

Drawing on evidence on public attitudes and social change from outside and within the R&D sector, a desk review identified a range of cultural lenses that are reshaping British society.

**2****Review of CaSE's public opinion research**

To inform the development of the subsequent phases, we reviewed evidence from our most recent large-scale studies with a specific focus on differences between voter groups.

**3****Qualitative research with self-ethnography**

Exploring the views of 25 voters, spread across the five main political parties and non-voters, to understand their priorities, ambitions and concerns, and how R&D fits into those, providing rich insights into individuals' lives.

**4****Quantitative research**

A nationally representative survey of 4,173 UK adults tested how prevalent the themes identified were among a large sample, and explored the narrative opportunities and challenges the R&D sector will need to navigate.

The results are sobering. A fragmented electorate is facing economic insecurity and deep cultural anxieties, with immigration emerging as a dominant dividing line between voter groups. There is a widespread loss of trust in institutions and a pervasive view that Britain is "broken".

These feelings are not confined to one party's supporters. The public may differ on the causes and solutions, but they are united on the diagnosis: a divided and troubled society at a crossroads. Many people feel let down or left behind, they worry about their finances and their futures, and often don't feel represented in political debate. Few feel positive that this can be fixed.

## Introduction

R&D appears to have been relatively well sheltered from this pervasive pessimism. Trust in R&D messengers, and in-principle support for investment, remain high and extends across all voter groups. However, this support is shallow – people find it hard to connect with R&D or see its benefit in their own lives.

This lack of connection may have protected R&D. CaSE research has consistently shows that many people have simply never considered the R&D system – how it is funded, how it functions – in any detail. But it won't serve us to remain distant from the public. In the absence of familiarity or awareness, people naturally gravitate towards their core beliefs. At present, these are often deeply sceptical – particularly of government spending – having been marred by scandals like procurement during Covid and highly-criticised projects like HS2.

This means that, while R&D is not yet a politicised issue, the risk is not hypothetical. We already see opinions towards R&D diverge around specific issues – such as climate or defence – and debates about the value of universities rage on. The instinctive support enjoyed by the R&D sector has not been fully stress-tested and we can't assume it would survive a compelling political narrative.

What we can do is prepare. We must proactively build our sector's resilience, converting shallow support into a connection that feels personal and local – a support that can drive political narratives, rather than be blown around by them.

There are things we can do immediately to better connect with people; finding stronger narratives and engaging with people where they are. But we can't focus on narratives alone. Our sector must show people that we recognise the realities they're facing, by genuinely listening and responding. Yes, we must change what we say, but also what we do and how we think.

If we want R&D to truly transform lives and livelihoods, we must embrace these deeper changes. This might mean ceding some power, recognising that involving people – in the right ways, at the right times – benefits our work, as well as making us more open and accountable to the public. Doing so will take time, energy and humility – but it will be worth it to create a resilient sector that truly serves both individuals and society.

## Recommendations

The findings in this report make a clear case for action. CaSE has offered a series of recommendations (found in full on page 34), all of which must be grounded in genuine, open engagement with people across all parts of society.

R&D advocates must reconsider **how we act** to ensure we work in ways that can earn lasting public support, and **how we engage** to ensure we reach voters across society with compelling narratives. Both are vital: we must reach people in the here and now, while recognising that long-term support won't result from narratives alone.

### How we act

1. The R&D sector must proactively listen to the public, partnering with them to make our work better.
2. The R&D sector must open up the research process by better valuing and resourcing public participation.
3. The R&D sector must prioritise and incentivise trustworthy behaviours.
4. The R&D sector must explore and evaluate ways to collaboratively put insights into practice.

### How we engage

1. The R&D sector must flip the "Broken Britain" narrative and position R&D as a source of hope.
2. The R&D sector must make its case outside crisis moments.
3. The R&D sector must adapt its messaging to suit a new voter landscape, and avoid stereotyping voter groups.
4. The R&D sector must create and champion narratives that make R&D feel more human, more local and more relatable.

## Results Summary

This project sought to understand how a fragmenting UK electorate may affect R&D advocacy. It draws on a review of external research, an analysis of CaSE's own evidence, in-depth qualitative fieldwork with 25 voters and non-voters, and a nationally representative survey of 4,173 UK adults. We have used this to examine the voter groups of each of the five main political parties, defined as those regularly polling over 10% in voting intention surveys in early 2026, as well those who do not plan to vote. When read together, we can draw six overarching conclusions:

### Fragmentation is creating a new political landscape

1

#### A new political cleavage is reshaping British politics, with party loyalty at a historic low.

The organising axis of British politics has moved from economic class to education, age and cultural values, and institutional trust has collapsed to historically unprecedented lows. The country has shifted away from a predominantly two-party system towards two voting blocs – but variation within the blocs is often as large as the differences between them. Vote intention remains fluid, but voters tend to stay within each bloc; Labour and the Conservatives have seen the greatest leakage from their 2024 General Election vote share, but largely to the Greens and Reform, respectively.

2

#### Challenger parties are a symptom of this fragmentation, not its cause.

Populist parties have emerged simultaneously on the right and the left, and the Greens and Reform are best understood as mirror images of each other, on different sides of the same dealignment process. Reform voters are united more by grievance than political ideology, while Green voters converge around a more consistent ideological core of environmentalism and redistribution. Disengaged, low-trust voters are largely switching to challenger parties rather than exiting politics; these parties are functioning as an exit valve from the two main parties.

### Voters are united by pessimism, but divided by its causes

3

#### A pervasive pessimism unites voters and centres on a “Broken Britain” narrative.

There is a shared sense that the country is in decline and that institutions no longer work for ordinary people. Our desk research, qualitative fieldwork and survey all point to a consistent “Broken Britain” narrative – and an equally striking “anxious Britain” thread – across all voter groups, in which daily life feels like a balance of small pleasures amid wider pressures from a country seen as financially broke, divided and adrift.

4

#### Immigration is the sharpest dividing line, but a sense of unfairness pervades all groups.

Immigration has become the dominant political dividing force, with our quantitative research showing that 90% of Restore Britain voters think immigration has made the country worse, compared with 16% of Greens. However, immigration is acting as a framework for a wider set of anxieties around fairness, identity and institutional competence. Voters share a sense that the social contract is broken and unfair, but hold differing views on the root cause. This is immigrants and benefit claimants for Reform, Restore and many Conservative voters; and wealth concentration and inequality for Green and some Labour voters.

### R&D enjoys broad public support, but this consensus is at risk

5

#### R&D gains support from voters despite broader fragmentation, and is often a source of hope.

Our quantitative research shows that in-principle support for Government investment in R&D never drops below a majority for any voter group, and British science is one of the top sources of hope among a largely pessimistic electorate. The research also emphasises that researchers, scientists and universities are trusted messengers, although there are pockets of distrust and uncertainty.

6

#### The consensus around R&D is shallow and stark divisions appear around specific issues.

Few feel they know much about UK R&D and, without prompting, investment into R&D can land as a cold and unfamiliar abstraction that many struggle to relate to their own lives or ambitions. This unfamiliarity risks R&D being linked to wider attitudes towards government spending, which often focus on waste or scandals. Moreover, R&D on certain issues, like climate change and defence, or the best way to tension global collaboration against domestic job creation, expose strong divisions along party lines.

# Reviewing external evidence: Class, culture and the collapse of consensus

The first phase of the project, in early 2026, was a review of existing sources. This was not intended to achieve the academic standards of a formal Rapid Evidence Assessment, nor provide an authoritative review of the literature, but represented a purposeful selection of 25 sources by the project team, informed by a call for evidence across the R&D sector. These sources included national social attitudes tracking, studies of populist right and populist left support, voter segmentation and tactical voting analysis, and cross-cutting analyses of party fragmentation and institutional trust.

## Key findings

1

### **A new political cleavage and a collapse in institutional trust are reshaping British politics.**

The organising axis of British politics has moved from economic class to education, age and cultural values. Meanwhile, institutional trust has collapsed to historically unprecedented lows, driven by specific, remembered failures rather than diffuse malaise. Science appears to have weathered this collapse fairly well, but there are risks to navigate.

2

### **Immigration is a central and misunderstood fault line.**

Immigration has become the dominant political dividing force, functioning as a container for a wider set of anxieties around fairness, identity and institutional competence.

3

### **The electorate has fragmented leading to the rise of challenger parties.**

The collapse of trust has produced not only dealignment but a voter landscape in which a shrinking, ageing core does most of the voting while a larger, more centrist and volatile portion of the public remains disengaged and 'up for grabs' as swing voters. Populist parties have emerged simultaneously on the right and the left, representing a symptom of dealignment, not its cause.

4

### **Reform UK and the Greens are best understood as structural mirror images.**

Reform are a coalition of voters held together more by grievance than political ideology, while Green voters converge on a more consistent ideological core of environmentalism and redistribution.

5

### **New divides by both age and gender mean that many current trends won't simply resolve themselves as voter cohorts age.**

Recent data undermines some widely held assumptions about how different demographic groups think and behave, including the belief that younger voters are uniformly more socially liberal.

## From Class to Culture

The traditional model of British politics – working-class voters backing Labour, middle-class voters backing the Conservatives – no longer describes how the country votes. British Social Attitudes (BSA) data for 2024 shows no meaningful variation in Conservative or Labour support by occupational class; the dominant dividing lines are now age, educational attainment and cultural values.<sup>1</sup> Not holding a university degree roughly doubles the odds of voting Conservative or Reform, independently of financial circumstances.<sup>2</sup> This pattern is echoed across Europe, where a continent-wide reordering by education and values, rather than economic class, has eroded mainstream vote shares while boosting challenger parties in some 28 countries.<sup>3</sup>

A closely related shift is the emergence of a libertarian/authoritarian values axis that now rivals, and by some measures surpasses, the traditional left/right economic axis in predicting voting choices. BSA data for 2024 shows this to be more predictive of vote choice than the left/right economic divide, with Reform drawing 28% of the most authoritarian-leaning voters but only 4% of libertarians, while the Greens and Liberal Democrats show the inverse pattern.<sup>4</sup> This trend has hardened: as recently as 2011, immigration scepticism was evenly spread across party lines, but by 2024 Conservative and Reform supporters were heavily negative about the issue, while Labour, Liberal Democrats and Green supporters were broadly positive.<sup>5</sup>

# Reviewing external evidence: Class, culture and the collapse of consensus

## The collapse of institutional trust

Running alongside – and substantially explaining – this shift in political cleavage is a seemingly unprecedented collapse in institutional trust. Only 12% of the public trust government to put the national interest above party interest "just about always" or "most of the time," and 59% "almost never" trust politicians to tell the truth.<sup>6</sup> Changes in government at elections historically produce at least a partial recovery in trust – but the 2024 General Election produced none.

Three driving factors for this collapse recur across the evidence: deterioration in the NHS (which functions as a symbolic barometer of whether the state cares about ordinary people); the cost of living crisis; and Brexit (with 60% of Leave voters "almost never" trusting politicians – a collapse rooted in a specific "broken promise").<sup>7</sup>

The trust crisis also incorporates a shift from scepticism of institutions to something closer to contempt. This matters because contempt, unlike scepticism, is not compatible with pragmatic engagement: even objectively effective policy can be rejected based on the messenger, and the professionalisation of political communication has become self-defeating, with stage-managed messaging read as inauthenticity.<sup>8</sup>

## Science, universities and institutional legitimacy

Science appears to have weathered this collapse in trust fairly well. Ipsos' long-running Veracity Index shows that in 2025, scientists were trusted by 81% to tell the truth<sup>9</sup>, and a November 2025 study from More in Common found that 84% have at least some trust in science<sup>10</sup>. This general trust in science is echoed in CaSE's own research in terms of the messengers people trust to talk about R&D and investment in it (this is discussed further in the next chapter).

However, these results are not cause for complacency. Trust is not held uniformly across society, it is fragile and the groups least represented in scientific roles are the least trusting. Recent studies emphasise a shift towards greater uncertainty and apathy, and more qualified levels of trust.

We also see nuance in attitudes towards different parts of the R&D sector. Universities illustrate, in microcosm, the same legitimacy dynamics that are reported elsewhere in this chapter.

Universities have not yet become a target of sustained political hostility thanks to reasonable public support – 63% of the public see a positive impact – and the most consistent concern is whether a degree delivers genuine value: 75% agree universities are not held accountable when degrees fail to lead to good jobs, with graduates viewing universities more positively than non-graduates.<sup>11,12</sup>

## Immigration is a central and misunderstood fault line

Immigration is the most potent unifying issue within the populist right coalition and the attitudinal dimension that has moved most sharply in recent years. Researchers consistently caution against viewing this as straightforwardly reducible to racism. Immigration functions as a proxy for a cluster of anxieties – about fairness, the pace of cultural change, and institutional failure.

This is supported by analysis suggesting economic insecurity acts as a push factor destabilising political allegiances, while cultural values act as the sorting mechanism, determining where a voter lands. This helps explain why financial precarity is not, in the UK, an independent predictor of right-wing support once cultural values are accounted for.<sup>13</sup>

Typological work identifies distinct motivations within wider concerns about immigration. Among more economically precarious groups the idea that there are "good ones, bad ones" has arisen, while among others conspiratorial narratives about child safety or cultural contamination prevail. Explicit ethno-nationalism exists among a smaller cohort.<sup>14</sup> Immigration therefore acts as a container for several anxieties rather than a single, uniform attitude.

## The electorate has fragmented leading to the rise of challenger parties

This collapse in trust has coincided with rising hostility towards established parties, not mere indifference. The proportion who "strongly dislike" the Conservatives has risen from 16% to 27% over the past decade, and for Labour from 9% to 22%.<sup>15</sup> Party dealignment has accelerated in step – 40% of voters now report no party identity, up from 29% in 2020, and the combined Conservative/Labour vote share fell to its lowest-ever level at the 2024 election, itself the most disproportional result in British electoral history.<sup>16,17</sup>

# Reviewing external evidence: Class, culture and the collapse of consensus

This dealignment is not primarily channelling into abstention. Disengaged, low-trust voters are more likely to switch to challenger parties – principally Reform and the Greens – which function as an "exit valve" from the traditional two-party system rather than an exit from democratic participation. The evidence suggests challenger parties respond to issue salience rather than creating it – symptoms of an accountability vacuum rather than its cause.<sup>18,19,20,21</sup>

The result is a fragmented electorate, with five parties regularly polling over 10% and Restore Britain potentially opening the field wider since it emerged in mid-2026. However, two main blocs remain, and tactical vote transfers occur overwhelmingly within, rather than across, these blocs. In a hypothetical Labour-versus-Reform contest, Labour's tactical vote is built almost entirely from current Labour, Green and Liberal Democrats supporters; Reform UK's from current Reform and Conservative supporters.<sup>22</sup>

That boundary is not fixed. In a hypothetical Conservative-versus-Reform fight, the Conservative lead has grown from a marginal 26%-25% a year ago to 31%-24% now, driven by Labour, Liberal Democrats and Green voters voting tactically.<sup>23</sup> Bloc loyalty operates alongside, and sometimes in tension with, party-specific calculation.

## Reform UK and the Greens are best understood as structural mirror images

It is important to understand these two challenger parties as structural mirrors of each other, rather than unrelated entities. On environmental attitudes and nearly every cultural dimension measured, Reform voters sit at one extreme and Green voters at the other, with wider voters clustering in-between. On questions of national identity or diversity the gap regularly exceeds 60 percentage points, which is wider, on some measures, than equivalent US partisan divides.<sup>24</sup>

Party choice is now a stronger predictor of a person's attitudes than any conventional demographic variable, underscoring how far identity-based allegiance dominates over policy positioning. Demographically, Reform skews older, non-graduate, male and authoritarian; the Greens draw disproportionately from younger, graduate, socially liberal voters. They represent two divergent exit routes from the same dealignment process, both filling simultaneously and at scale.<sup>25</sup>

## Reform UK: A coalition of grievance, not ideology

Since the 2024 General Election, Reform has regularly polled as the most popular party, peaking at around 29% of the vote in September 2025. Independent analyses converge on one central finding: the coalition is not ideologically coherent.<sup>26</sup>

What holds the coalition together is a pervasive distrust of institutions, a collective sense of cultural alienation, heightened and acute threat perception, and views towards immigration – which acts as the principal adhesive. However, as the Reform voter base has expanded, priorities have diversified to include the cost of living, the NHS and crime.

On economic questions, Reform supporters diverge from a standard right-wing profile. They support nationalisation of utilities at a similar rate to the wider public and believe big businesses exploit ordinary people. They are more likely than Conservative voters to think working people don't get their fair share, while also opposing high taxation and viewing the benefits system as too easily exploited. This is not contradiction but a coherent, fairness-based view that distrusts both state and market when either reward those judged not to have "earned" their position.

On social issues, the picture is more mixed. Reform voters are close to the wider public on family-related questions such as gay marriage and abortion, but diverge sharply on trans rights. On climate, Reform is the only group where opposition to net zero outweighs support, but this is not straightforward climate denial, with a majority in favour of renewables investment.<sup>27</sup>

Restore Britain, which emerged in mid-2026, sits further to the right of Reform on several measures explored in this project's primary research (see the chapter on CaSE's quantitative research), but had not been discussed in depth in external literature reviewed in early 2026. It is important to note that where desk-reviewed sources predate Restore's emergence, their findings about the Reform coalition may already have been partially superseded.

# Reviewing external evidence: Class, culture and the collapse of consensus

## The Green surge

Since Zack Polanski's election as Green Party leader in September 2025, the party has recorded a sustained surge in membership size that has seen it overtake the Conservatives.<sup>28</sup> YouGov vote intention figures show an increase from 8% (13 Jan 2025) to a high of 21% (2 March 2026), although it has since fallen back to 12% (9-10 August 2026).

Attitudinal data confirms that Green voters are an ideological mirror image of Reform voters: furthest from the national average on environmental prioritisation, at the socially liberal extreme on every cultural measure, and to the left of Labour on redistribution.<sup>29</sup>

## Gender and generational patterns are adding complexity

Recent evidence runs against several common assumptions about how different demographic groups think and behave. This includes the idea that younger voters are uniformly more socially liberal than older cohorts. Among 16-24 year-olds, the proportion wanting the country to "return to how it used to be" has nearly doubled since 2020 (16% to 31%); those saying trans rights have gone too far has doubled (9% to 19%); and those calling "woke" an insult has risen from 19% to 38%. These remain smaller absolute figures than among older cohorts, but the direction and pace are notable.<sup>30</sup>

There is also a distinct gender divergence. Young women (16-29) are the only group more likely to see "woke" as a compliment than an insult, with the highest rate of any group (42% compared with 31% for young men) saying trans rights have not gone far enough. Young men are the only male age group with a substantial rise in self-identifying as "woke" (17% to 29%), while simultaneously showing higher anti-woke identification than young women – polarisation within the young male population specifically, rather than a uniform generational drift.<sup>31</sup>

## Reviewing CaSE's evidence: Divisive issues but trusted messengers

Where the preceding chapter drew on external literature to describe how and why the UK electorate is fragmenting, this chapter revisits CaSE's own research to understand what that fragmentation means for public attitudes to R&D.

It draws on two pieces of CaSE-commissioned work: Public Attitudes to R&D 2025 (PAR25), a nationally representative survey of 8,000 UK adults (11-25 July 2025), and Public Attitudes to R&D in Scotland and Wales 2026, which comprised surveys of 2,707 adults in Scotland and 1,626 adults in Wales (20-28 January 2026).

We note that, although PAR25 was only conducted a year ago, the voter landscape has already changed, with more younger voters moving to the Green Party and shifts in Reform's supporter base.

### Key findings

1

**Voter blocs are not monolithic and there are similarities between the challenger parties.**

CaSE's research shows that differences within a voter group can be as large as differences between them. Although on many issues, Reform and the Greens are on opposite ends of the spectrum, there are notable commonalities.

2

**Support for R&D is broad but shallow, with divisions appearing around issues.**

Support for R&D investment is notably broad, but this consensus rests on shallow foundations, with weak personal and local connections. Issues, such as climate or defence, open up divisions.

3

**R&D voices are trusted messengers, even among the most distrusting groups.**

CaSE's research consistently shows that research charities, researchers and universities are trusted as messengers by comfortable majorities across every voter group.

### Voter blocs are not monolithic and there are similarities between the challenger parties

The surveys considered in this chapter both show that differences within voter groups often match, or exceed, differences between them, emphasising that treating "Reform voters" or "Labour voters" as uniform audiences risks missing variations.

This offers a genuine advocacy opportunity for more tailored messaging that recognises different audience groupings.

PAR25 challenges some assumptions about voters:

- Some 73% of Green voters aged 55+ cited the environment and nature as a particular personal interest, compared with 44% of those aged 18 to 34. This gap is wider than many of the gaps observed between different parties on the same question.
- Younger Reform voters were measurably less negative about the idea of tackling climate change than their older counterparts, and more evenly divided on the value of getting involved in global problems than older Conservative voters. This means a segment of Reform's youngest supporters sits closer to the political centre on these issues than the Conservatives' older voters.
- Although Reform supporters were less likely to hold a degree – with two in five having no formal qualification beyond GCSE – a majority had some further or higher education.

PAR25 also reveals alignments between voters on different parts of the political spectrum:

- Voters for the challenger parties were more likely to agree the UK is a country in decline and least likely to say that R&D benefits people in the country equally.
- Voters for the challenger parties are considerably less likely to feel connected to their local area or to the UK than supporters of the two established main parties.
- When asked how well their area was doing, the only group where a majority took a positive view were Labour voters. Reform and Green voters were at the other end of the spectrum.
- Voters for the two established main parties were far more likely to think working people get their fair share of the nation's wealth, highest (40%) among Conservatives, compared with just 15% among Green voters.

## Reviewing CaSE's evidence: Divisive issues but trusted messengers

### Support for R&D is broad but shallow, with divisions appearing around issues

CaSE's research has consistently found that support for R&D is broad, and holds across the political spectrum. When asked if it was important for the Government to invest in R&D, a majority in each voting group agreed, and this is true across each of PARD25 and the surveys in Scotland and Wales.

Framing matters, though: a question in PARD25 that asked whether R&D should be funded "by taxpayers' money" found lower levels of support. This was most notable among Reform voters, although a greater proportion still took the pro-R&D position.

When asking about national priorities for the country, some areas – notably defence, immigration and climate change – provoke strong differences across voter groups. However, a majority of every voter group says that "investing in research, science and technology" should be a priority for the UK.

But, broad in-principle support does not necessarily translate into something deeper: society's connection to R&D is weak, and many struggle to see its benefits. PARD25 found:

- Around half (51%) could not immediately think of any ways R&D benefits them or their family, rising to 61% among Reform voters, against 34% among Labour.
- Almost three quarters (74%) said they knew hardly anything or nothing about R&D in their local area. Again, the highest figure (83%) was among Reform and the lowest (57%) among Labour.

CaSE's research shows that those who are more optimistic tend to be more supportive of R&D, with optimism also being divided by vote intention. For instance, in the 2026 Scottish survey, 68% of Scottish Conservative voters think Scotland is a country in decline, against just 15% of Green voters and 13% of SNP voters, who are considerably more likely to think that Scotland is a country moving forwards.

Looking beyond high-level support, framing R&D around different societal issues can expose fractures. Environmental and climate-related R&D gains more support among Green voters; 84% in PARD25 said responding to climate change should be a priority for extra R&D investment, compared with 45% of Reform voters. In contrast, 75% of Reform voters would prioritise defence R&D, compared with 49% of Green.

The same trend is seen outside the lens of R&D. In the 2026 Scotland survey, just 2% of Green voters said strengthening the armed forces should be a national priority for Scotland, compared with 15% of Reform voters; just 2% of Reform voters said tackling climate change should be a national priority for Scotland, compared with 47% of Green voters.

Pharmaceutical R&D and higher education create similar but less extreme divides. In the Scotland and Wales surveys, those intending to vote Green were less likely to support increased or maintained investment in R&D when framed around the pharmaceutical industry, but were more supportive when it was framed around higher education. The reverse was true of Reform voters.

### R&D voices are trusted messengers, even among the most distrusting groups

CaSE's research consistently shows that research charities, researchers and universities are trusted as messengers by comfortable majorities across every voter group, in contrast to politicians, journalists and social media influencers.

In PARD25, nationally, 74% said they would trust researchers to be honest about how much money the Government should invest in R&D, rising to 82% among Labour voters and falling to 68% among Reform. A similar pattern is seen for universities, but there was notably more distrust among Reform voters, where 24% said they don't trust universities – this figure was around 10% for other groups.

Although Reform voters tended to be among the least trusting of any messenger (with the exception of those who would not vote, for all messengers), they were notably more trusting of large businesses, with a figure of 44%, just two percentage points below the national average.

In contrast, Green voters were notably distrustful of large businesses, with nearly two in five saying they don't trust them to be honest about how much money the Government should invest in R&D.

Politicians fare worst of all messengers tested, with only Labour voters being split more evenly between trust and distrust. Social media influencers performed almost as badly: every voter group except Labour distrusted them on balance, although younger voters within every group were consistently more trusting of influencers than their older counterparts.

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

This chapter presents findings from an exploratory qualitative study of 25 voters using the Indeemo research platform and an approach based on self-ethnography. This approach was chosen to explore and contextualise the lenses through which voters are making decisions. This produces a rich and personal account of how people think and feel, in their own words and in their own settings.

Participants were recruited across the political spectrum, and recorded selfie videos and photographs over the course of a week in response to 11 structured tasks. Thirteen participants completed the exercises alone and 12 were invited to complete some jointly with a partner, friend or family member, allowing us to see voters discussing topics with each other.

We note that this is a small, exploratory sample comprising six Labour, five Reform UK, five Green, four Conservative, three Liberal Democrats and two would-not-vote participants. Its value lies not in statistical generalisability but in the depth of insights and its ability to bring findings to life.

### Key findings

#### 1 A “Broken Britain” pessimism unites voter groups, with a more personal “anxious Britain” undertone.

Daily life was described as a balance between small pleasures and constant pressure, in a country viewed as financially broke, divided and adrift. Pessimism and anxieties were tangible and often personal (from fear of experiencing hate, to having to carve out calm spaces to survive) alongside anxieties about the direction of the country and the wider world.

#### 2 A shared sense of unfairness is directed towards different causes

A common view is that hard work no longer reliably pays off, but there is disagreement on why this is the case: immigration and benefit claimants are the focus for most Reform and some Conservative participants, wealth concentration for Green and some Labour participants.

#### 3 Investment in R&D lands as a cold, unfamiliar abstraction, and the instinctive reaction was to its scale rather than its substance.

Introduced without prompting via a headline referencing the £20.7bn invested in R&D each year, the dominant first response was surprise at the size of the figure and a demand to justify it against more pressing priorities. This echoed the suspicion of government spending visible in earlier chapters. The term R&D itself was regularly misunderstood compared with how the sector would define it – especially the word ‘development’.

4

#### R&D is hard to relate to personal aspirations and people struggle to take an informed view on government support.

Participants struggled to see how R&D linked to their aspirations, and local connections focused on the desire to see problems fixed, rather than a clear expression of how R&D might help achieve that. Participants were split on how their party should treat R&D and didn’t think it would influence their voting choices.

5

#### Researchers, scientists and universities are the most trusted to talk about R&D across voter groups.

They were named as the most trusted messengers by virtually every participant regardless of party, while politicians and social media commentators were consistently the least trusted. But some participants, notably Reform voters, concede they find it difficult to know who to trust.

### Outlooks and sentiments

The first seven of the 11 tasks asked participants to describe their daily lives, relationships, communities, local area, views of the UK, and hopes for themselves and their families. There was no reference to R&D at this point. The purpose was to start from where people are, rather than lead with the subject of ultimate interest, to allow the findings to validate, extend or challenge the conclusions of the desk review. This section summarises the themes identified across the seven tasks.

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

### Daily pressures, quiet loneliness and mixed feelings on locality

A broadly consistent account of daily life emerges regardless of political affiliation: a balance between small, genuine pleasures – family time, gardens, pets, exercise, hobbies – and a constant undertow of pressure from work, time poverty, parenting logistics, traffic and finances. These pressures were described in near-identical terms by participants across every party grouping.

Most participants described social lives built around a small number of close, often long-standing relationships with family, and one or two enduring friendships or friendship groups. Maisie (Green) described a friendship group that has met weekly since she was ten or eleven years old. Only a few participants had wider networks. This pattern of small, contained social bubbles was general across the sample rather than distinctive to any one party.

There were no instances of acute social isolation or disengagement. Where loneliness or social isolation was noted, it aligned with personal circumstances, such as the cost or distances involved, or someone's life stage, rather than voting intention. This often came with a desire to have more time to spend with friends or opportunities to meet new people.

"We always cancel and I just find it really difficult to see friends. It also comes down to money. Everybody's always skint."

**Bryony, Reform**

When asked whether their local area was thriving, in decline, or left behind, and what should be done about it, there was a range of sentiments. This ran from unreservedly positive to deeply negative, and was not aligned with voter groups. For instance, Conservative voters described *"a nice area... well cared for"* (Layla), *"half the shops are closed... it's just really dead"* (Sean), council debt (Vincent) and a lack of local facilities (Sami).

This indicates that individual circumstances – the state of the local high street, a specific council's record or recent local event – are just as important in how someone feels about their area as their politics.

### "Broken Britain": pessimism, division and anxiety

The research points to a consistent narrative: a sense that the country is, in some fairly fundamental way, financially broke; that its society is divided (for some participants irreparably so); that its institutions no longer care about ordinary people or the country's future; and that there is no clearly hopeful future in sight. Where this pessimism surfaced, it was frequently accompanied by impatience for visible, immediate fixes rather than long-term investment, including from participants who had hoped for faster improvement under the Labour Government after the 2024 General Election. Taken together, this amounts to something close to a "Broken Britain" account of the country's condition.

Running alongside this is an equally striking "anxious Britain": a country that feels persistently on edge. This anxiety was rarely expressed in the abstract. It surfaced, unprompted, in intensely personal terms. Aaron (Reform) described his garden as "my happy place and my safe space" – a small, deliberately protected place of calm carved out against the backdrop of a demanding job, three children and a wider sense that "we're losing our identity" locally.

For Bryony (Reform) the anxiety ran further, into a fear, discussed with her partner in her videos, about the possibility of large-scale conflict: *"I guess he [partner] is ready and he thinks that there's a war coming, and it's not nice to hear."* This led her, elsewhere in the same task, to ask, *"Have I done the right thing having children? Is our safety as a family secure?"*

A related theme was a widespread sense of division within British society. For several Reform and some Conservative participants, division was experienced as a sense of being discriminated against or overlooked in favour of others, particularly recent immigrants. By contrast, for several Green and some Labour participants the more pressing source of division was the perceived rise of a harder political right, with increasing hostility towards minorities and immigrants.

"I live in London as a Black female and I think there's a lot of hostility towards people of colour, disabled people, people that have immigrated here."

**Charlotte, Labour**

Steven (Labour) reflected on what growing up amid this division means for his own children: *"It's saddening and I feel bad for my children that they're growing up in that."*

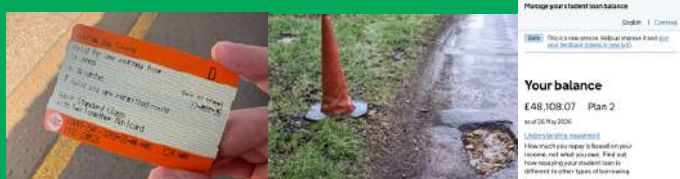
# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

### Images chosen to represent Britain

The sense of decline and division was particularly apparent in a task where participants were asked to choose an object or image that best represented where they thought the UK was heading, and to explain their choice.

**Green participants** chose to emphasise costs and prices. This was through a ticket or, in Elliot's case, a screenshot his own student loan balance, explaining that his parents had each been able to buy a house for around £50,000 and commenting *"that's not now"*. Another chose the ever-present problem of potholes.



**Conservative participants** chose to highlight the problems they see in society through a pothole and an image of small boat crossings.



**Labour participants** chose symbolic images to show a country at a crossroads; an umbrella held together with tape to suggest resilience under pressure; and a ruler to represent an increasingly exclusionary society. Steven chose a photograph of police in riot gear confronting a crowd, highlighting the effect of political rhetoric on public division: *"I think Nigel Farage stoked that division... he made it OK to be racist for a lot of people."*



**Liberal Democrats participants** chose images representing division and challenges, whether symbolic or real. These were the English flag, that the country has a mountain to climb, and graffiti reading *"this is Eglad"* (sic).



**Reform participants** chose images to convey their sense of a country in decline or going down the drain through "closing down" signs on the high street or a bathroom plughole. Sylvia, choosing an overflowing bin, offered one of the most emphatic statements of national pessimism in the sample, saying she felt the UK is *"on a road to destruction that can never be repaired"*. Another participant chose an image of flags, to represent national pride.



The references that emerge from this exercise reinforce a conclusion from the desk research: that a sense of national decline and division is genuinely cross-cutting, but the explanations for it diverge sharply. The divisions identified in this qualitative research follow the same value and identity lines already identified in the desk review: immigration and cultural change for Reform voters, economic unfairness and generational injustice for Green voters, institutional incompetence for many Conservative voters, and a more hopeful, resilience-under-pressure framing for several Labour voters. The diagnosis is shared, but cause, prognosis and solutions feel starkly different across the voter groups.

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

### Fairness, the state and a lack of vision

The dominant sentiment, echoed by participants across the political spectrum, was that politicians and governments simply "don't deliver" and do not understand the everyday struggles of people like them. For several participants this took on a sharper edge: a sense that people who work hard, plan carefully and try to do the right thing – the aspirational strivers – are penalised rather than rewarded by the system.

This feeling extends into a cross-cutting theme of fairness. For several Reform and Conservative participants, unfairness was framed as a system rigged in favour of others – commonly, immigrants and benefit claimants receiving what was seen as preferential treatment. For Greens, unfairness lay in uneven wealth distribution and their own struggles to achieve home ownership or pay off debt.

Consistent with the desk review's findings about decreasing institutional trust, participants expressed scepticism towards the Government. This feeling was grounded in concrete, remembered examples of failure, rather than being an abstract concept. Participants across the political spectrum cited, largely unprompted, the same set of examples: cronyism in public contracts awarded during the Covid pandemic, historical BBC scandals, and Partygate.

There was a pervasive sense that neither the current Government (at the time led by Keir Starmer) nor the political system more broadly had a clear sense of direction. This was expressed by Claudia (Liberal Democrats), who described the UK as *"a country in crisis, with no vision, leadership, or hope for improvement"*. Navjot (Labour) similarly said: *"There doesn't seem to be a plan. We'll invest in this, but what's the end goal? What are we trying to invest and improve?"*

### Opportunities, the next generation and nostalgia

When asked about their ambitions and hopes for their family's future, the dominant theme was pessimism about the next generation's prospects. This cut across every voter grouping without meaningful exception and was primarily driven by housing costs and the cost of living.

"How would they afford to get on the property [ladder]? ... I really don't know how they will ever do it."

**Navjot, Labour**

Among several Reform participants, this pessimism extended to active consideration of emigration. This was a notable pattern that reflects the strength of feeling among these individuals, though it should be interpreted as three individuals within a group of five rather than a defining feature of Reform voters.

Where solutions were proposed, these did not follow a straightforward left/right split favouring collective and systemic change on the centre-left, and personal responsibility on the centre-right. For example, Conservatives Sean and Vincent both called for Government intervention on housing and cost of living in terms very similar to those used by Labour and Green participants.

There was a recurring sense of nostalgia, though it was rarely for a specific historical decade. Instead, participants described a lost sense of psychological safety and a broken social contract; a longing for a time when working hard reliably led to a better life, when young people had an achievable path to home ownership, when there was a stronger sense of belonging within communities, and when public services were effective.

### Vote intention

Task 8 of the 11 asked participants which party they would vote for in a general election and why. This revealed a restlessness and, in many cases, a sense of anger, but with further signs of a two-bloc formation rather than of structureless fragmentation.

Three of the five Green voters previously voted Labour and described a considered, values-driven switch away from it. This was most often driven by disillusionment with Labour's direction rather than a positive pull from the Green party's policies. Several Reform voters noted they had previously voted Conservative or Labour.

For the most part, the research supports the model identified in the desk research: two voting blocs with high internal fluidity, but little movement between them. Few participants described any willingness to move from Conservatives or Reform towards Labour, the Greens or the Liberal Democrats, or vice versa.

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

However, there were exceptions. Asher (Labour) praised Kemi Badenoch's leadership and indicated a willingness to vote Conservative. Robert (Reform) – whose partner intends to vote Green – said he was considering voting Green but also cited Kemi Badenoch's position on student loans as compelling. Neither case should be read as evidence of a wider trend, but they are useful reminders that declared vote intention and settled political identity are not always the same thing.

The appeal of each party was different. Reform's pull was driven more by sentiment than policy: beyond immigration, only two participants named a specific policy (abolishing tax on overtime), and the dominant note was an undirected desire for something different. As Camille put it: *"We've given Labour a chance, we've given the Conservatives a chance."* For Sylvia, support was personal, citing strong agreement with *"everything"* Reform UK's home affairs spokesperson Zia Yusuf puts on Facebook.

However, endorsement for Reform was often qualified. Bryony was open about disagreeing with *"some of their policies"* and uncertain *"how they can make a difference"*, and her partner (a former Labour voter) disliked Reform leader Nigel Farage but was open to voting for either Reform or Restore Britain based purely on their stance on immigration.

Green voters, by contrast, engaged more with specific policy substance. A carbon tax, wealth tax, nationalisation and net zero policies were each raised independently by more than one participant. Several also described the party as having evolved from a single-issue environmental party into a broader left-wing one focused on public services, infrastructure and levelling up. But the party's voters weren't uniformly enthusiastic – while Maisie, Gareth and Spencer expressed genuine conviction, Elliot and Marcus had arrived as Green voters by elimination rather than attraction.

Conservative and Labour voters appear aligned along conventional lines. The Conservatives' appeal centred on individual alignment with the party's economic instincts: Sean identified with entrepreneurs and small business owners, while Layla emphasised education and economic growth. Labour's appeal was more often rooted in inherited political identity and fairness than in policies. Jasmine's and Steven's Labour loyalty both traced to working-class, public-sector family tradition, and Charlotte's centred on the party's historic association with protections for ethnic minorities, women and disabled people.

Where current Labour policy was mentioned – Navjot's approval of breakfast clubs, free childcare and NHS investment – it came with a growing sense that the party's focus had drifted from *"working people"* to *"those on benefits"*.

While many participants were frustrated, they still sought to vote for someone, rather than abstaining. However, frustration could also lead to apathy: Chloe (would not vote) put her own position starkly: *"Would you vote? No. Why? Because there's nobody that's worth voting for."* This feeling wasn't unique to those who wouldn't vote, it extended to some of the intending voters.

"Honestly, I don't really think voting is worth it anymore, because a lot of people feel like no matter what party gets into power, everyday problems don't improve that much."

**Tabitha, Labour**

### Attitudes to R&D

Tasks 9 to 11 marked a pivot in the study. Having established participants' outlooks, relationships, local concerns and voting intentions without any reference to R&D, Task 9 introduced the subject without preamble, showing a statement about the amount of investment in R&D and asking for initial reactions. Task 10 then came back to participants' earlier answers – their aspirations, local area, and chosen party – to test whether R&D connected to any of their stated priorities. Task 11 then asked about trust in different messengers on R&D specifically.

### Large figures need strong justifications

Participants were shown the statement: "The Government will spend £20.7bn of public money to support UK Research and Development (R&D) in 2026." This aimed to mirror a typical news headline, which would not necessarily be nuanced or provide comparison figures.

First reactions to the headline were consistent across voter groups: surprise at the scale of the figure and a demand for more context or justification against other pressing priorities.

"That statement to me needs more information. It's a headline statement, but I guess... it's empty without any detail."

**Robert, Reform**

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

Among those wanting more information, Gareth (Green) said: *"It seems like a big number, but is it a big number? I just don't really know... I'd want to look at what... we're trying to find out."*

Similarly, Chloe (Would not vote) and her mother wanted any large spending commitment explained *"just in lay terms, to try and explain to people... what they're going to do with that money and how it's going to improve people's lives"*. Meanwhile, Kirsty (Liberal Democrats), worried it might just be *"money given to jobs for the boys"*, echoing sentiments of distrust noted in earlier sections about scandals involving public procurement.

These feelings mirror CaSE's previous qualitative research, where focus group participants expressed concerns that large sums would be spent without transparency or accountability, and a sense that the money would disappear into a *"black hole"*.

A recurring, almost identical line of reasoning across the sample held that the Government should *"invest in the country first"* – fixing visible, immediate problems – before spending on research. Several participants felt that *"research"* was unnecessary because problems were already well understood, and solutions known, so the Government should *"just get on with it"*. This is consistent with views in focus groups in [CaSE's PARD25 study](#).

However, several participants felt a natural disposition towards supporting R&D investment in principle. Vincent (Conservative) felt it was *"by and large a very good thing"*, while Maisie (Green)'s first reaction was that it was a *"a good thing"*, with R&D being *"a sector that definitely could do with more"*. Spencer (Green) went further: *"Research and development is how we stay innovative... knowledge is power... anytime more money is put into uncovering the mysteries of the world, then I think that's a noble endeavour."*

Layla (Conservative) was drawn to the entrepreneurial case for R&D spending, name checking Elon Musk and reasoning that *"funding to the right person in the right sector... could make a massive difference [to the country]"*. Even Chloe (Would not vote), whose fuller answer raised several caveats about how the money should be spent, described her first instinct as *"obviously... a positive, definitely a positive"*.

This positivity was not evenly spread: it was most consistent among Conservative, Green and Liberal Democrats participants, while Reform and some Labour participants were more likely to lead with scepticism or caveats.

Sami (Conservative) was considerably more sceptical, worrying that other countries would *"just steal research and development"* from the UK. This was unique among the responses in this sample, though a similar concern was noted in the PARD25 qualitative research.

### The importance of terminology

The term R&D was not always well understood by participants, with some linking *"development"* with delivery – for instance of local development projects. To explore the influence of the term itself, 17 of the 25 participants were sent a written follow up question asking: *"If the headline said 'spend £20.7 billion of public money to support British science and innovation' would that have made any difference to you, or would you feel the same?"*

Of the 16 who responded, some felt that *"science and innovation"* sounded more specific, trustworthy or reassuring. For example, Robert (Reform) said it *"would have made more of a difference, as it's providing a little more information than just a generic statement"*, adding that he liked *"the idea of UK being seen as leading the world in this area"*.

However, this was not universal and the underlying concern – the scale of the figure, or suspicion of how public money is spent – persisted. Sami (Conservative) said the reframing *"would make no difference"*, and Navjot (Labour) said she would *"still think this is a huge number"* and that it was the phrase *"public money"*, not *"research and development"*, driving her concern.

CaSE's previous large-scale research into terminology has found that *"Research and Development"* gains similar levels of support in the context of education, jobs and investment as science or innovation, and that it is understood as an umbrella term for subjects spanning the arts, social sciences and sciences. A summary of our findings from across multiple studies can be found [on CaSE's website](#).

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

### Relevance and relatability

Task 10 asked participants to consider R&D in more depth, explicitly tying it back to their stated aspirations, local concerns and voting choices. Engagement varied sharply by question rather than just by person.

Most participants found it hard, and some impossible, to link R&D to their personal aspirations or their own lives. The most common reaction was that the concept itself wasn't clear.

"I don't know what research and development is. It's not clear enough... so it's very difficult for me to make any real judgement as to whether or not research and development is going to make a difference to my life."

**Steven, Labour**

People struggled to see how R&D would have an impact on their own – or anyone else's – ambitions. Kirsty (Liberal Democrats) said: *"I don't think the research and development can help me achieve anything in my career."* This sentiment was echoed by Asher (Labour): *"It's really difficult to... know how it would directly impact anyone's aspirations really at the moment."*

Maisie (Green) reached a similar dead end when trying to connect R&D to her hope of buying a house: *"There might be a way that research and development could possibly help me get on the housing ladder, but I'm not sure how. If there was a way I would love to know, but I don't see how they would link together."*

Where participants did make a connection, it tended to be indirect and tied to something they imagined might or could happen, rather than specifics. Elliot (Green) reasoned that R&D into cheaper, more sustainable energy might eventually bring down the cost of living and so make homeownership more achievable, rather than identifying anything R&D could do for him specifically, or right now.

It was easier for participants to talk about R&D and their local areas than R&D in their own lives, but closer reading suggests this reflects local priorities more than any real understanding of what R&D could contribute. Asked to relate R&D to their area, participants typically named problems they most wanted solved, then worked backwards to ask whether "research and development" might be the thing that solves it, rather than starting from a sense of how R&D would do that.

"They might come up with machinery that will make the roads better and fixing potholes a lot easier, which is the local problem."

**Vincent, Conservative**

Vincent's suggestion of pothole-fixing machinery captures this pattern precisely: a genuine local frustration, reframed as an R&D solution largely because the question invited it. Camille (Reform) and Maisie (Green) followed the same pattern: Camille wanted *"more research and development into... having more police patrols, more of a police presence in the area"*, and Maisie wanted research into *"why jobs are failing and why no one can get jobs in and around this area"*. Both named outcomes they wanted, rather than seeing a role for R&D.

Bryony (Reform) made essentially the same point in reverse. Asked whether R&D could fix local problems, she listed exactly the same kind of issues – *"the traffic, the infrastructure, the doctors, the waiting times at the hospitals, the schools, the potholes"* – but rejected the idea that research was needed. *"I don't think you need to spend £20 billion on research to have a look. You just have to go outside and just see it with your own eyes... it's common sense."* For Bryony, naming local problems was not evidence that she saw R&D as relevant; it was evidence that she didn't.

A handful of participants made links based on direct, local experience. Layla (Conservative) and her partner talked about agriculture, saying *"research and development could help farmers and maybe get a better yield off the crops... make the crops more nutrient dense, different kinds of pesticides"*. Marcus (Green), reflecting on the nuclear waste storage debate, distinguished between R&D question and communications: *"I feel like the research and the development part of that was maybe missed more than... a media campaign to get people onside."*

When reflecting on whether R&D would influence how they voted, there were no clear trends by party group, but it was clear few participants see it as a doorstep issue. The main exceptions were Spencer (Green), who said he would be *"worried"* if a party manifesto did not mention the UK's research sector at all, given its global standing, and Claudia (Liberal Democrat), who said *"it's absolutely not OK if they [the party] have nothing to say on this subject"*. However, Claudia added that she had *"never heard them talking about anything related to R&D"*.

# Qualitative research using self-ethnography:

## Pessimism, division and uncertainty

Two of the six Labour participants – Asher and Navjot – said plainly that R&D was not a factor in how they would vote, whichever party they supported. Asher put this down to a lack of awareness rather than a lack of interest: *“It wouldn’t make or break whether or not I’m going to vote for the political party... I wouldn’t have acknowledged it.”* He added that now he knew the scale of the spending involved, he might start paying more attention to what parties said about it.

Going further, Reform participants Bryony and Sylvia were explicit in their dismissal of R&D as a Government priority. For Bryony, it was about prioritisation and a need to not delay addressing problems. *“I don’t want to see anything about research and development. I want to see action,”* although she added: *“We need to acknowledge that there’s research and development to be done, but I don’t think it’s a priority.”*

For Sylvia, the issue was that R&D investment wouldn’t benefit people like her. *“I feel that I am going to be in a group of people that will not benefit one bit from it... so what’s the point of them having this astronomical sum?”*

However, this should not be read as a uniform Reform position: Robert and Camille both engaged with the subject constructively, with Camille proposing that R&D investment into apprenticeships *“would be amazing”*, and Robert saying he would be more inclined to vote for a politician who talked credibly about R&D, *“trying to future plan for Britain”*.

### Messengers and trust

The final task asked participants three questions:

- Who they trust to tell the truth about important issues and current affairs.
- Whether they would trust a news item or social media post specifically about R&D.
- Who, from a list of organisations and individuals provided to them (social media commentators / influencers, Government, political parties, researchers and scientists, universities, large businesses, and charities), they would trust or distrust to put out messages about R&D, and why.

Researchers, scientists and universities were consistently named as the most trusted messengers by almost every participant, which aligns with all previous CaSE research.

These views tended to centre on perceptions of good intentions and expertise, with Spencer (Green) saying that researchers and scientists are *“the ones who are actually doing it... simple as that”*.

*“Researchers and scientists, you know I do trust those to be fair. They don’t have a reason to lie.”*

**Bryony, Reform**

The only clearly dissenting voice was Vincent (Conservative), who rejected the whole list on principle, saying that *“every institution has let me down”*. He specifically distrusted universities, which seemed to be driven by a perception of bias: *“They’re going to support the people paying for their R&D.”*

This sentiment around universities and perceptions, or risk, of bias was echoed elsewhere. Bryony (Reform) said she would *“like to think”* universities could be trusted to put out R&D messages, but referenced *“the very left-leaning in politics in the university”*.

Politicians, social media commentators and, to a lesser extent, journalists were consistently the least trusted. The reasons given closely mirror those discussed earlier, such as self-interest and a track record of past scandals.

However, for some, personality overrides distrust in these groups. Sylvia (Reform) placed her trust in Nigel Farage and Zia Yusuf personally, and in *“Facebook journalists”*, rather than in researchers or universities.

Notably, a distrust of politics and mainstream media did not extend to distrust of R&D, including among some within the Reform sample. Robert (Reform), having rejected the BBC, Government and political parties in turn, was unambiguous about where his trust lay, saying: *“The only pure ones from this list is researchers and scientists.”*

Almost every participant described some form of active verification before accepting or dismissing a claim. This included checking multiple outlets before believing a story (Kirsty, Liberal Democrats; Charlotte, Labour; Gareth, Green); checking who is behind an account before trusting a post (Robert, Reform) or naming specific verification tools. Marcus (Green) described a website that fact-checks and rates media sources, while Bryony’s partner (Reform or Restore Britain leaning) described using X’s community notes and its AI tool, Grok, to check posts. Low trust, in these instances, generally translated into effortful cross-checking.

## Quantitative research: Broad support for R&D amid divisive issues

This chapter reports a nationally representative survey of 4,173 UK adults, designed to test at scale the findings from the desk review and the exploratory qualitative research. The questionnaire drew on our knowledge of key variables, allowing us to see how these shifted between groups within this study. These questions were inspired by previous CaSE research and informed by evidence from the desk review, but are adapted for this context, and so are not directly comparable to the results of other CaSE public opinion research.

The survey was conducted from 17-21 July, just as Andy Burnham was appointed the new Prime Minister, and so offers an up-to-date picture of the electorate.

### Key findings

1

#### Vote intention remains fluid.

Behind the stated first-preference, only 30% name one party they would vote for exclusively, whereas more than half (54%) would consider two or three parties.

2

#### Shifting voters tend to stay within a political bloc.

Labour and the Conservatives have seen the greatest leakage from their 2024 General Election vote share, but largely within their respective blocs (Labour moving to Green; Conservative moving to Reform UK). There is also evidence of the 2024 Reform UK vote leaking to Restore Britain.

3

#### A handful of cultural outlooks gain consensus, but many issues divide voters.

Broad agreement is found on statements such as "the world is at a dangerous point right now" (75%) and "Government should listen more to scientific evidence" (64%). By contrast, immigration is highly polarising, with 16% of Green voters but 90% of Restore Britain voters saying it has made the country worse.

4

#### Attitudes to potential Government ambitions are mixed and often divisive, except for science.

Among 18 possible Government ambitions tested, national self-sufficiency, protecting rural spaces and eldercare support each gain majority agreement of around six in ten. Securing the border is the most polarising, whereas scientific ingenuity is the least partisan ambition for the Government to pursue.

5

#### Personal connections, public services and British science offer hope.

There are pockets of hope among the public, with family and friendships, public services and British scientific and technological innovation as the top sources.

6

#### Awareness of R&D is low, but underlying support is positive.

Only 16% feel they know a lot about the R&D being done in the UK. Despite this, 69% think it is important for the Government to invest in R&D and 61% think it makes a significant economic contribution. Support for Government investment is seen across voter groups, ranging from 61%–65% (Restore Britain, Reform UK) to 78%–81% (Labour, Liberal Democrats).

7

#### Aspirations and priorities for R&D diverge on specifics.

When asked what Government aspirations for R&D should be, the top choice is jobs for the new generation, framed around building homegrown scientists (47%), which comes well ahead of global collaboration (29%) or attracting scientists from around the world (25%). Green voters lean towards global collaboration while Reform UK and Restore Britain voters prioritise domestic jobs. Most voter groups would prioritise biology and medical technologies over other types, with defence and clean energy technologies splitting the public down party lines.

*Note: This chapter uses vote intention figures drawn from our own general population survey and are not the output of a dedicated political opinion poll. They should not be compared directly with, or read alongside, published voting intention polls. Unlike polls conducted by British Polling Council member organisations, our figures have not been adjusted for a respondent's certainty or likelihood to vote, for known patterns of differential non-response by political affiliation (sometimes termed "shy voter" effects), or rebased to exclude "don't know" or "would not vote" responses, as is standard practice for headline voting intention polling. We use this question to segment our sample by political affiliation for analysis, not to estimate election outcomes.*

# Quantitative research: Broad support for R&D amid divisive issues

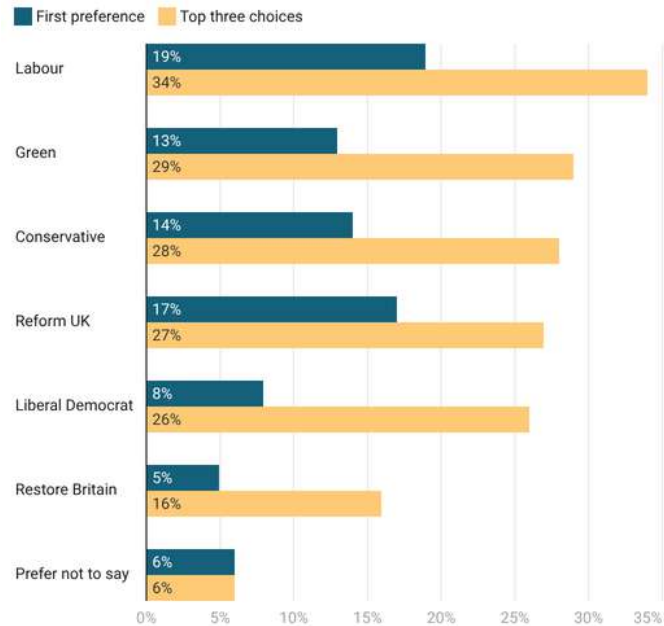
## Vote intention and fluidity

Asked which party they would vote for if a general election was called tomorrow, 19% of respondents named the Labour Party, 17% Reform UK, 14% the Conservative Party, 13% the Green Party, 8% the Liberal Democrats and 5% Restore Britain, with 11% saying they would not vote.

However, when asked which parties they would consider voting for, and invited to rank up to three, the picture opened up considerably (Figure 1). Labour's potential reach nearly doubled, to 34%. The Liberal Democrats and Restore Britain each more than tripled, to 26% and 16% respectively. Every party showed the same pattern to some degree. The gap between a party's headline vote share and its potential reach into the electorate is large, underscoring the potential for further shifts in the voter landscape in the future.

**Figure 1: Vote intention - stated first preference and top three choices**

Who would you consider voting for if a General Election was called tomorrow? Please select UP TO THREE parties and RANK THEM in order of who you are most likely to vote for... If there is only one party, or two parties, you would genuinely consider voting for, just select these. (n=4,173)



Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

Comparing current vote intention against recalled vote at the 2024 General Election confirms that every party has lost some share of its 2024 base to others (Figure 2). Retention is highest for the Greens (76% of 2024 Green voters would vote Green again, as their first preference) and Reform UK (71%).

It is lowest for Labour, where only 54% of 2024 Labour voters currently name Labour as their first choice, with the largest single leak (14%) going to the Greens. The Conservative vote has primarily leaked to Reform (19%), and Reform's own vote shows early signs of leaking to Restore Britain (17%).

**Figure 2: Comparison of 2024 General Election vote and 2026 vote intention (based on first preference)**

Y axis: Vote intention (VI), based on first preference (17 -21 July) / X axis: Vote at the 2024 General Election (24). (n=4,173)

|                   | Con (24) | Green (24) | Labour (24) | Lib Dem (24) | Reform (24) | Did not vote (24) |
|-------------------|----------|------------|-------------|--------------|-------------|-------------------|
| Conservative (VI) | 66%      | 4%         | 5%          | 6%           | 5%          | 6%                |
| Green (VI)        | 1%       | 76%        | 14%         | 8%           | 1%          | 13%               |
| Labour (VI)       | 2%       | 4%         | 54%         | 6%           | 2%          | 8%                |
| Lib Dem (VI)      | 2%       | 5%         | 5%          | 62%          | 1%          | 3%                |
| Reform (VI)       | 19%      | 2%         | 8%          | 6%           | 71%         | 9%                |
| Restore (VI)      | 3%       | 3%         | 3%          | 2%           | 17%         | 5%                |
| Would not (VI)    | 3%       | 1%         | 5%          | 2%           | 2%          | 48%               |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

To explore voter loyalty, we can look at those who did not select any other parties. This was only a minority of 30%. Of the remaining 70%, around half (54%) named either two or three parties they would consider, while 11% said they would not vote and 6% prefer not to say. Loyalty varied by party, but within a relatively narrow range: Conservative and Green voters were the most likely to name only their own party (40% each), while Liberal Democrats and Restore Britain voters were the least (28% and 27%).

Looking beyond first preferences to include all the top three considerations sharpens the two-bloc picture identified earlier in the report (Figure 3). Those who voted Reform in 2024 would predominantly now consider Reform, Restore Britain or the Conservatives (88%, 51% and 38% respectively); 2024 Conservative voters show the mirror pattern, considering Conservative, Reform and Restore Britain (84%, 48% and 20%). On the centre-left, the same clustering holds between Labour, the Greens and the Liberal Democrats.

# Quantitative research: Broad support for R&D amid divisive issues

However, the data does not show two fully sealed blocs. A meaningful minority of 2024 Conservative voters (19%) would consider the Liberal Democrats, and 11% would consider Labour; the 2024 Labour vote in particular shows real openness to every other main party.

**Figure 3: Comparison of 2024 General Election vote and 2026 vote intention, for top three parties**

Y axis: Vote intention (VI) (17 -21 July), top three parties considered / X axis: Vote at the 2024 General Election (24). (n=4,173)

|                        | Con<br>(24) | Green<br>(24) | Labour<br>(24) | Lib<br>Dem<br>(24) | Reform<br>(24) | Did<br>not<br>vote<br>(24) |
|------------------------|-------------|---------------|----------------|--------------------|----------------|----------------------------|
| Conserv-<br>ative (VI) | 84%         | 13%           | 16%            | 21%                | 38%            | 11%                        |
| Green<br>(VI)          | 9%          | 87%           | 39%            | 39%                | 6%             | 20%                        |
| Labour<br>(VI)         | 11%         | 33%           | 72%            | 41%                | 7%             | 15%                        |
| Lib Dem<br>(VI)        | 19%         | 32%           | 35%            | 80%                | 6%             | 12%                        |
| Reform<br>(VI)         | 44%         | 8%            | 15%            | 12%                | 88%            | 15%                        |
| Restore<br>(VI)        | 20%         | 8%            | 10%            | 7%                 | 51%            | 11%                        |
| Would<br>not (VI)      | 3%          | 1%            | 5%             | 2%                 | 2%             | 48%                        |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Cultural outlooks, anxiety, ambitions and hope

The second part of the survey explored the outlooks and cultural lenses identified in the desk review, alongside anxiety, personal ambitions and reactions to a range of possible Government ambitions. These questions offer a snapshot of how each voter group sees the world.

### Cultural outlooks

Twenty-five paired statements, framed as opposing positions about the world, were tested. Respondents could position themselves anywhere between them and responses were coded to either statement A, statement B or neutrality.

A small number of statements command broad consensus: the world is at a dangerous point right now (selected by 75%), the UK is deeply divided (68%), the country needs a recovery or rescue plan (65%), and the Government should listen more to scientific evidence when making decisions (64%).

Distrust is equally dominant: 70% said politicians don't care about people like them, and 61% said they don't trust the Government to tell the truth. Together, these form the shared cultural backdrop.

A second group of statements shows a population split down the middle. Respondents were split on whether the UK's system of democracy "basically works" (40%) or needs fundamental change (39%). Close behind were:

- Whether their local area was doing well (35%) or badly (30%), with around the same proportion of neutral responses (35%).
- Immigration has improved the country or made it worse (38% vs 45%).
- Hope versus pessimism for Britain's future (41% vs 37%).
- Globalisation's upsides versus downsides (37% vs 35%).
- Views on tax and spending, with 39% favouring lower taxes and less spending and 34% the reverse.

Some statements gained neither consensus nor an even split. Asked whether they agreed with the idea of "Broken Britain", half (50%) said they did, but 23% said they did not. Similarly, around half said economic growth should be the top priority to make things better with the country (54% compared with 22% who said it shouldn't), and that they were proud of their local area (49%, compared with 23% who said they were not).

There was a prevailing view that, overall, technology has had a positive impact on our quality of life: 58% take this view compared with 19% who think the impact has been negative. However, this does not extend to AI, where opinion flips to negative: 48% say AI is on balance negative, compared with 27% positive.

Analysis by voter group (Figure 4) confirmed that the divisive statements cleave largely along party lines, while several other items hold up as genuine consensus points.

Some of the most significant differences were:

- Agreement with the sentiment of "Broken Britain" ranged from just 31% among Labour voters (the only group where it is a minority view) to 86% among Restore Britain voters. The sense that the UK is badly in need of a recovery plan follows an almost identical gradient (42% to 90%).

# Quantitative research: Broad support for R&D amid divisive issues

**Figure 4: The public's outlooks on a series of cultural issues**

Respondents were shown a series of paired statements. Table shows % who selected that statement. Subset of statements shown to illustrate consensus or divergence; full results on CaSE's website. (n=4,173)

| Theme                               | Statement selected                                                                         | Con | Green | Labour | Lib Dem | Reform | Restore Britain | Would not vote | UK average |
|-------------------------------------|--------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|-----------------|----------------|------------|
| Pessimism and optimism              | I agree with the idea of "Broken Britain"                                                  | 50% | 41%   | 31%    | 40%     | 79%    | 86%             | 49%            | 50%        |
| Pessimism and optimism              | The UK is a place that is deeply divided                                                   | 63% | 73%   | 59%    | 66%     | 82%    | 90%             | 58%            | 68%        |
| Pessimism and optimism              | The UK is badly in need of a "recovery" or "rescue" plan                                   | 70% | 68%   | 42%    | 60%     | 87%    | 90%             | 64%            | 65%        |
| Pessimism and optimism              | I'm hopeful that Britain can turn its fortunes around                                      | 44% | 37%   | 61%    | 52%     | 31%    | 31%             | 27%            | 41%        |
| Governance, democracy and the state | Our system of democracy no longer represents the people and needs fundamental change       | 27% | 52%   | 28%    | 31%     | 50%    | 61%             | 42%            | 39%        |
| Governance, democracy and the state | Generally, I don't trust the UK Government to tell the truth                               | 59% | 68%   | 35%    | 47%     | 83%    | 90%             | 65%            | 61%        |
| Governance, democracy and the state | Politicians don't care about people like me                                                | 64% | 78%   | 55%    | 58%     | 87%    | 88%             | 73%            | 70%        |
| Governance, democracy and the state | I favour lower taxes and less public spending                                              | 52% | 24%   | 23%    | 24%     | 62%    | 56%             | 41%            | 39%        |
| Governance, democracy and the state | I think public investment is inefficient and wasteful                                      | 41% | 23%   | 22%    | 27%     | 50%    | 48%             | 28%            | 32%        |
| Governance, democracy and the state | The Government should listen more to scientific evidence when making decisions             | 62% | 79%   | 73%    | 78%     | 51%    | 53%             | 52%            | 64%        |
| Local, national and global outlooks | My local area is doing badly                                                               | 28% | 31%   | 25%    | 19%     | 41%    | 47%             | 30%            | 30%        |
| Local, national and global outlooks | I feel I belong in my neighbourhood                                                        | 56% | 43%   | 55%    | 53%     | 46%    | 40%             | 31%            | 47%        |
| Local, national and global outlooks | I am proud of my local area                                                                | 58% | 45%   | 59%    | 56%     | 43%    | 36%             | 34%            | 49%        |
| Local, national and global outlooks | I feel proud to be from the UK                                                             | 58% | 28%   | 57%    | 50%     | 43%    | 38%             | 29%            | 44%        |
| Local, national and global outlooks | Immigration has on balance made this country worse                                         | 57% | 16%   | 26%    | 27%     | 86%    | 90%             | 46%            | 45%        |
| Local, national and global outlooks | Globalisation has more upsides than downsides for Britain                                  | 35% | 52%   | 50%    | 50%     | 18%    | 13%             | 26%            | 37%        |
| Opportunities and growth            | Economic growth should be the top priority if we want to make things better in the country | 69% | 39%   | 54%    | 53%     | 67%    | 51%             | 45%            | 54%        |
| Opportunities and growth            | There are always opportunities in this country if you're willing to work hard              | 67% | 24%   | 43%    | 48%     | 55%    | 36%             | 37%            | 45%        |
| Opportunities and growth            | Young people no longer have a roadmap for a good life                                      | 35% | 68%   | 45%    | 47%     | 33%    | 39%             | 36%            | 43%        |
| Role and impact of innovation       | On balance, technology has a positive impact on our quality of life                        | 59% | 58%   | 68%    | 65%     | 57%    | 44%             | 48%            | 58%        |
| Role and impact of innovation       | On balance AI is negative (e.g. job losses, privacy risks, removes human intuition)        | 45% | 62%   | 44%    | 45%     | 48%    | 58%             | 42%            | 48%        |
| Security                            | The UK military is too weak to defend the nation from international threats                | 62% | 30%   | 42%    | 45%     | 74%    | 68%             | 41%            | 50%        |
| Security                            | The world is at a very dangerous point in time right now                                   | 79% | 72%   | 70%    | 74%     | 89%    | 88%             | 66%            | 75%        |
| News and information sources        | I like to know what's going on in the news each day                                        | 67% | 56%   | 70%    | 65%     | 65%    | 54%             | 34%            | 60%        |
| News and information sources        | The mainstream news sources (e.g. BBC, ITV, Sky, Channel 4 News) are the most trustworthy  | 69% | 51%   | 72%    | 73%     | 44%    | 28%             | 39%            | 56%        |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Quantitative research: Broad support for R&D amid divisive issues

- Immigration is the single most polarising item tested: just 16% of Green voters said it has, on balance, made the country worse, compared with 90% of Restore Britain voters and 86% of Reform voters. This 74-point spread is the largest of the statements tested.

In contrast, voters from all parties tended to agree that "the world is at a very dangerous point right now", ranging from 66% (those who would not vote) to 89% (Reform).

For the R&D sector, it is notable that the statement that "the Government should listen more to scientific evidence when making decisions" was one of the least partisan ideas tested.

### Anxiety

Anxiety was a strong theme in the qualitative research, and the survey asked how anxious respondents felt about a range of personal and societal issues. Responses were gathered on a five-point scale; in this section, 'extremely' and 'very' anxious are grouped as respondents having high anxiety.

Respondents were consistently more anxious about things beyond their immediate control, rather than about their personal circumstances. More than half (58%) expressed high anxiety about the direction the world is heading in, the highest of any item tested. Some 49% reported feeling high anxiety about the direction of the country and 44% for their children's life chances – in contrast with just 29% for their own financial situation and 21% for their own job security.

Anxiety about the direction of the country was sharply political (Figure 5). Some 75% of Restore Britain voters and 69% of Reform voters reported high anxiety, against 30% of Labour voters; a 45-point spread. Anxiety about the direction of the world was comparatively uniform, ranging from 48% (would not vote) to 66% (Green); an 18-point spread.

Notably, both Green and Restore Britain voters reported markedly higher anxiety about their own financial situation (43% and 36% respectively) compared with other voter groups, with Conservatives, Labour and Liberal Democrats voters all sitting at 23-24%.

### Personal ambitions

Asked to select their main ambitions or priorities in life from a list of 19 options, the majority chose the personal, modest and security-driven over the ambitious or status-driven.

Financial security (64%) and health and wellbeing (60%) were far ahead of everything else, followed by work-life balance (31%), friendships (30%) and travel (29%).

Analysis by vote intention (Figure 6) reveals divergences. Crime and safety was named by 44% of Reform voters and 39% of Restore Britain voters, compared with 13% of Green voters. Work-life balance runs the other way (42% of Green voters compared with 23% of Conservative voters). However, elsewhere there is uniformity; financial security and health and wellbeing were the top two priorities for all voter groups.

Respondents were asked whether the ambitions they selected were getting easier or harder to achieve. For anything connected to housing or long-term financial planning, the clear answer was that it feels much harder. Some 75% of those who named housing and home ownership as an ambition said it was getting harder (of which 52% said "much harder"), followed closely by retirement readiness (70% harder) and financial security (70% harder).

# Quantitative research: Broad support for R&D amid divisive issues

**Figure 5: The public's anxieties**

How anxious, if at all, do you feel about each of the following? (n=4,173 for all but "life chances for children", which is a filtered base of 1,032 with children)

| Statement                                                       | Con | Green | Labour | Lib Dem | Reform | Restore | Would not vote | UK av. |
|-----------------------------------------------------------------|-----|-------|--------|---------|--------|---------|----------------|--------|
| Your financial situation                                        | 23% | 43%   | 24%    | 24%     | 29%    | 36%     | 29%            | 28%    |
| Your job prospects / job security                               | 13% | 34%   | 19%    | 19%     | 19%    | 24%     | 20%            | 21%    |
| Your life chances / ability to get ahead in life                | 19% | 40%   | 24%    | 21%     | 25%    | 32%     | 26%            | 26%    |
| The life chances for your children / their ability to get ahead | 40% | 51%   | 39%    | 45%     | 53%    | 53%     | 44%            | 44%    |
| The direction the country is heading in                         | 47% | 55%   | 30%    | 38%     | 69%    | 75%     | 44%            | 48%    |
| The direction your local area is heading in                     | 18% | 21%   | 15%    | 14%     | 33%    | 36%     | 22%            | 21%    |
| The direction the World is heading in                           | 56% | 66%   | 53%    | 60%     | 64%    | 65%     | 48%            | 57%    |

Net: "Extremely anxious" +  
"very anxious"

13% 75%

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

**Figure 6: The public's ambitions**

Which of the following are your main ambitions or priorities? Please select UP TO FIVE. Table shows a subset of responses; full results on CaSE's website. (n=4,173)

| Statement                                                                                          | Con | Green | Labour | Lib Dem | Reform | Restore | Would not vote | UK average |
|----------------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|---------|----------------|------------|
| Financial security: living comfortably without worrying about bills or paying off debt             | 66% | 68%   | 66%    | 65%     | 65%    | 59%     | 61%            | 64%        |
| Health and wellbeing: maintaining physical fitness and emotional well-being                        | 63% | 57%   | 64%    | 68%     | 60%    | 56%     | 55%            | 60%        |
| Work-life balance: finding a job that allows enough time for personal/family life                  | 23% | 42%   | 37%    | 31%     | 26%    | 28%     | 33%            | 31%        |
| Strong friendships: getting to see your friends regularly and/or opportunities to make new friends | 31% | 35%   | 32%    | 34%     | 26%    | 27%     | 23%            | 30%        |
| Travel and exploration: seeing new places and experiencing different cultures                      | 30% | 32%   | 28%    | 34%     | 30%    | 23%     | 23%            | 29%        |
| Crime and safety: Living in a safe and stable neighbourhood                                        | 33% | 13%   | 24%    | 24%     | 44%    | 39%     | 21%            | 27%        |
| Retirement readiness: saving enough to stop working comfortably                                    | 25% | 19%   | 25%    | 24%     | 25%    | 27%     | 22%            | 24%        |
| Personal growth: learning a new skill, language, or hobby                                          | 13% | 26%   | 20%    | 20%     | 15%    | 20%     | 18%            | 18%        |
| Housing and home ownership: getting on, or moving up, the housing ladder                           | 15% | 22%   | 18%    | 18%     | 14%    | 14%     | 19%            | 17%        |
| Job security: having a stable job with low risk of being made redundant                            | 13% | 22%   | 17%    | 15%     | 15%    | 15%     | 17%            | 16%        |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Quantitative research: Broad support for R&D amid divisive issues

### Government ambitions

Beyond personal ambitions, the survey explored attitudes towards a range of broad political ambitions or 'directions' for the nation that a UK Government might choose to promote. Eighteen ambitions were tested to reflect a range of platforms, solutions or directions that have been relevant to UK political discussions in recent years. Respondents were asked how much they agreed with the direction on an 8-point scale; agreement is reported below as the top two points on this scale ('completely' or 'mostly' agree).

Three of these Government ambitions each drew agreement from almost two-thirds of people: national self-sufficiency (64%), protecting rural spaces from overdevelopment (64%), and eldercare support (64%). Close behind were focusing close to home before problems abroad (61%) and scientific ingenuity, which was framed as building on "Britain's proud scientific and engineering past" (59%). This was followed by rewarding hard work through welfare reform (58%) and securing the border (54%).

In the middle was a group ranging from institutional change through regional levelling-up, wealth redistribution and equal opportunities. They all gained between 48% and 56% agreement. The least broadly popular directions were a new wave of home building (44%), global cooperation and leadership (44%), a small state and lower taxes (43%), and a green economy (43%).

Analysis by voting intention once again shows sharp differences (Figure 7). Securing the border was the most polarising: 90% of Restore Britain voters agreed compared with 23% of Green voters, a 67-point spread. A green economy runs almost as wide in the opposite direction (74% Green vs 21% Reform and Restore Britain).

Scientific ingenuity stands out as the exception. Among voters (as opposed to those who would not vote), agreement ranged from 59% (Reform) to 70% (Liberal Democrats) - the narrowest of the ambitions tested.

### Pockets of hope

Respondents were asked where they find "pockets of hope", allowing them to select up to five of the ten options provided. Family and friendships came first (selected by 51%), followed by the UK's public services and "British scientific and technological innovation" (both 37%). The UK's cultural and creative industries were also cited frequently (31%). By contrast, fewer found cause for optimism in "a specific political movement or party" or "the country's institutions" (both 14%). A sizeable minority (17%) said they have no hope or optimism at all.

Assessed by voter group (Figure 8), hope in British science and technology has broad appeal, although with some differences. Liberal Democrats voters were the most likely to name it as a source of hope (52%), followed by Conservative and Labour voters (44% each), then Reform (37%, in line with the UK average).

Notably further away are Green voters (30%) and Restore Britain voters (29%). The proportion who said they don't have any hope was notably high among Reform (24%), Restore Britain (22%) and those who wouldn't vote (31%).

# Quantitative research: Broad support for R&D amid divisive issues

**Figure 7: Public attitudes to potential Government ambitions**

An important role for any Government is to set out their preferred ambitions or "directions" for the country. Below is a range of potential political directions for the UK. For each, tell us whether you agree or disagree with this direction for the UK? A subset of statements are shown; full results on CaSE's website (n=4,173)

| Statement                                                                                                                                                                               | Con | Green | Labour | Lib Dem | Reform | Restore | Would not vote | UK average |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|---------|----------------|------------|
| National self-sufficiency: ensuring we don't rely on other countries for things like our security, energy or food                                                                       | 68% | 59%   | 63%    | 67%     | 78%    | 78%     | 49%            | 64%        |
| Protect rural spaces: We should defend our local green belt and rural areas from overdevelopment and house building                                                                     | 66% | 64%   | 62%    | 69%     | 70%    | 73%     | 53%            | 64%        |
| Eldercare support: the state should invest heavily to provide better social care, support and dignity for the aging population                                                          | 66% | 63%   | 66%    | 68%     | 67%    | 68%     | 50%            | 63%        |
| Focus close to home: prioritising fixing problems here in the UK, before we start to worry about problems abroad                                                                        | 67% | 46%   | 54%    | 52%     | 81%    | 86%     | 55%            | 61%        |
| Scientific ingenuity: we should build on Britain's proud scientific and engineering past and capture the promise of science and technology to change lives                              | 60% | 61%   | 67%    | 70%     | 59%    | 60%     | 41%            | 59%        |
| Rewarding work: the welfare system needs to be overhauled to reward hard-working people                                                                                                 | 67% | 45%   | 55%    | 59%     | 75%    | 73%     | 49%            | 59%        |
| Secure the border: reducing immigration numbers or stopping completely specific types of immigration                                                                                    | 70% | 23%   | 44%    | 43%     | 86%    | 90%     | 47%            | 55%        |
| A business led recovery: We need a modern industrial strategy where the government works with businesses to invest in infrastructure, science and jobs                                  | 61% | 43%   | 52%    | 58%     | 59%    | 58%     | 38%            | 51%        |
| Wealth redistribution: we should close the gap between the richest and poorest by increasing taxes on the well-off and reducing the burden on the working class and the squeezed middle | 30% | 74%   | 65%    | 58%     | 34%    | 43%     | 47%            | 51%        |
| Equal opportunities: we need to prioritise gender and racial equality to eliminate wage gaps and end systemic discrimination                                                            | 39% | 70%   | 62%    | 56%     | 35%    | 36%     | 41%            | 50%        |
| Home ownership: we should prioritise a new wave of house building, including a new generation of social housing                                                                         | 38% | 54%   | 56%    | 51%     | 41%    | 37%     | 33%            | 45%        |
| Global cooperation and leadership: we need to continue to be a major player in international affairs, contributing to global alliances and treaties                                     | 44% | 50%   | 56%    | 61%     | 34%    | 32%     | 30%            | 45%        |
| A small state and lower taxes: The UK needs to shrink the size of the government, cut red tape and lower income and business taxes to reward hard work                                  | 53% | 29%   | 31%    | 35%     | 65%    | 70%     | 37%            | 43%        |
| A Green Economy: We should transition away from fossil fuels and focus on insulating homes, improving transport networks and investing in green technologies                            | 28% | 74%   | 56%    | 59%     | 21%    | 21%     | 33%            | 43%        |

Net % "completely" + "mostly" agree

21% 90%

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Quantitative research: Broad support for R&D amid divisive issues

**Figure 8: Where do the public find pockets of hope?**

Even if you feel frustrated with the current state of the UK, in which of the following specific areas, if any, do you still feel "pockets" of hope and optimism for the future? Please select UP TO 5. (n=4,173)

| Statement                                                                                                                                                    | Con | Green | Labour | Lib Dem | Reform | Restore | Would not vote | UK average |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|---------|----------------|------------|
| In my family and friendships: Believing that regardless of the national picture, my family is safe and well and I have friends that matter to me             | 54% | 55%   | 52%    | 54%     | 49%    | 47%     | 44%            | 51%        |
| In our public services: Believing in our NHS, schools and other public services                                                                              | 35% | 40%   | 51%    | 46%     | 28%    | 23%     | 28%            | 37%        |
| In British scientific and technological innovation: Believing our scientific ingenuity and researchers will drive future success                             | 44% | 30%   | 44%    | 52%     | 37%    | 29%     | 21%            | 37%        |
| In the UK's cultural and creative industries: Believing our music, film, art, and sports will keep us relevant and proud on the world stage                  | 30% | 43%   | 43%    | 39%     | 22%    | 19%     | 18%            | 31%        |
| In my local community: Believing that local people, neighbours, and community spirit can fix things where the government fails                               | 24% | 24%   | 27%    | 29%     | 22%    | 19%     | 14%            | 23%        |
| In British businesses and entrepreneurs: Believing that small businesses and local wealth creators will find a way to thrive despite economic hurdles        | 32% | 14%   | 22%    | 26%     | 28%    | 16%     | 12%            | 22%        |
| In the younger generation: Believing that young people in the UK have the right values and energy to fix the country's problems                              | 18% | 30%   | 29%    | 23%     | 15%    | 13%     | 17%            | 21%        |
| In the country's diversity and tolerance: Believing that Britain has become a dynamic and multicultural society that has improved the country for the better | 15% | 29%   | 30%    | 28%     | 6%     | 6%      | 15%            | 19%        |
| In the country's institutions: Believing in the checks and balances that have shaped our democracy                                                           | 20% | 10%   | 20%    | 19%     | 11%    | 4%      | 7%             | 14%        |
| In a specific political movement or party: Believing that a rising political force (on the left or right) will eventually change the country for the better  | 10% | 16%   | 12%    | 8%      | 23%    | 35%     | 4%             | 14%        |
| I don't have any hope or optimism - I feel entirely pessimistic about the future of the UK                                                                   | 13% | 11%   | 8%     | 7%      | 24%    | 22%     | 31%            | 17%        |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

# Quantitative research: Broad support for R&D amid divisive issues

## Awareness, attitudes, aspirations and priorities for R&D

### Awareness of and attitudes to R&D

When asked if they had heard the phrase “Research and Development”, almost two in three (64%) said they had. This varied modestly by vote intention, being highest among Liberal Democrats (76%) and Labour (72%) voters and lowest among Restore Britain (59%) and Reform (62%).

After this question was posed, respondents were shown a definition of R&D which is used in all CaSE public opinion surveys and is based on the Frascati definition (it can be found in full in the Methodology section).

The next set of questions were posed as paired statements, with a slider that allowed respondents to position themselves at any point between them. Responses were then coded to either three points (statement A, statement B, or neutrality) or, to explore the responses in more granularity, seven points (1-3, neutral (4), 5-7).

Looking first at the simple, three-point scale. For self-reported knowledge of R&D in the UK, just 16% said they feel they know a lot about the R&D being done in the UK, compared with 63% who felt they didn't. There was almost no difference between voter groups (Figure 9), ranging from 60% to 72%, regardless of their likelihood of encountering the term in the first place.

Despite low levels of knowledge, underlying support for R&D was positive on every dimension tested:

- Close to seven in ten (69%) said it is important for the UK Government to invest in R&D (just 10% disagree).
- Close to three in five said that R&D makes a significant contribution to the country's economy (61%) and that investing in R&D now, rather than waiting for the economy to improve first, is the right approach (60%).
- More than half (55%) considered R&D a genuine national strength.

Looking at the scale in more granularity (Figure 10), it is notable that opinion clusters heavily in the middle of the scale (positions 2-6) rather than at the extremes. This suggests that relatively few people hold emphatic pro- or anti-R&D positions, and are more likely to sit somewhere in a broadly but not strongly supportive middle ground.

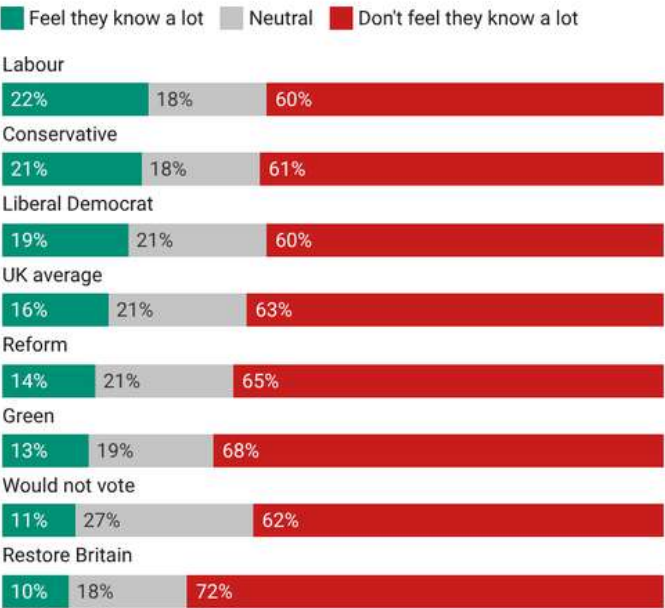
Analysis by vote intention (Figure 11) shows that even among the two groups least persuaded of R&D's importance, there is majority support for Government investment in R&D. These are voters for Reform (65%) and Restore Britain (61%). This is behind Labour (78%) and Liberal Democrats (81%) voters.

A majority of all groups said that R&D makes a significant contribution to the economy, except Restore Britain (46%) and those who would not vote (42%); the same picture is seen when asked if R&D is a national strength, where a majority said it was, except Restore Britain (43%) and those who would not vote (40%). In both cases, this was mostly driven by a larger proportion of neutral responses rather than outright disagreement.

When asked about when to invest in R&D, a majority of most voter groups said it is important to invest now to grow the economy, peaking among Labour and Liberal Democrats (both 72%), but dropping to 52% for Reform and 49% Restore Britain. This emphasises the sense of immediate priorities and desire for change among Reform UK voters, as seen in the other phases of research.

**Figure 9: Self-reported knowledge about UK R&D**

For each pair of statements about R&D, please tap the position on the slider to indicate where your own view lies. A. I feel I know a lot about the R&D being done in the UK vs B. I don't feel I know much about the R&D being done in the UK (n=4,173)

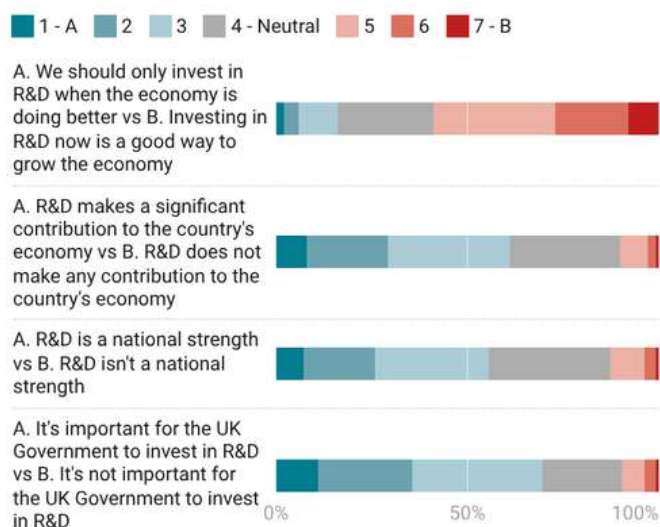


Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Quantitative research: Broad support for R&D amid divisive issues

**Figure 10: Public attitudes to different aspects of R&D**

For each pair of statements about R&D, please tap the position on the slider to indicate where your own view lies. Responses coded to a seven-point scale. (n=4,173)



Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

### Aspirations and priorities for R&D

The next question asked respondents what the main aspirations of any UK Government should be for the future of British science and R&D, allowing them to select up to three of eight options. These were framed by a short statement followed by an explanation of the goal or how it might be achieved.

The top choice – selected by 47% – was “Jobs for the new generation: To build up a new generation of homegrown scientists through massive investment in state schools and universities”. This was followed by “Talent retention: To offer high salaries and world-class facilities so we stop the best British scientists being poached by the US or Europe” (38%) and “Domestic job prioritisation: To encourage UK research labs and tech firms to hire qualified British science graduates ahead of international applicants” (37%).

Other themes trailed behind: global collaboration (29%), global excellence (28%), attracting the best scientists from around the world (25%) and commercialisation (21%). Few respondents (11%) selected the response stating “None of these: the Government should not be prioritising or funding scientific research over other immediate national needs”.

When looking at voter groups (Figure 12), most think R&D should be supported in some way – although a notable 24% of those who would not vote felt that the Government shouldn't prioritise research. However, there are differences in preferred approach. Green voters were more likely to select in their top three global collaboration (41%, the highest of any group) and jobs for the new generation of homegrown scientists (60%, also the highest).

Reform and Restore Britain voters, by contrast, were far more likely to prioritise domestic job protection (47% and 53% respectively) than either global collaboration (15% for both) or attracting international talent (24% and 15%).

The next question asked respondents where they would prioritise investment for science, technology and innovation, given that governments don't have unlimited budgets. The options were informed by the eight sectors of the Starmer Government's 2025 [Modern Industrial Strategy](#), ranging from the creative industries and financial services to the life sciences and advanced manufacturing. For the questionnaire, each was translated into a more tangible form with examples, and respondents were able to select up to three as priorities for investment.

At the top of the list were biology and medical technologies (57%), ahead of defence and security technologies (48%) and clean energy technologies (44%). All the other technologies tested – finance, manufacturing, digital and AI, business services, and creative and media – sit well behind, each selected by fewer than a quarter of respondents.

Biology and medical technologies gain the most consensus across voter groups (Figure 13), with a narrow range of support from 51% to 68% across voter groups.

By contrast, some technologies show sharp divides:

- Defence and security technologies are selected by 65% Conservative and 64% Reform voters, compared with just 27% Green.
- Clean energy technologies are selected by 72% Green and 60% Liberal Democrats voters, compared with 24% Reform and 23% Restore Britain.

## Quantitative research: Broad support for R&D amid divisive issues

**Figure 11: Public attitudes to different aspects of R&D, by vote intention**

For each pair of statements about R&D, please tap the position on the slider to indicate where your own view lies. Table shows % selecting this statement (n=4,173)

| Statement                                                     | Con | Green | Labour | Lib Dem | Reform | Restore |
|---------------------------------------------------------------|-----|-------|--------|---------|--------|---------|
| Investing in R&D now is a good way to grow the economy        | 63% | 64%   | 72%    | 72%     | 52%    | 49%     |
| R&D makes a significant contribution to the country's economy | 62% | 65%   | 73%    | 73%     | 57%    | 46%     |
| R&D is a national strength                                    | 57% | 59%   | 66%    | 63%     | 51%    | 43%     |
| It's important for the UK Government to invest in R&D         | 71% | 75%   | 78%    | 81%     | 65%    | 61%     |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

**Figure 12: The public's views on government aspirations for UK R&D**

When thinking about the future of British science and R&D, what should the main aspirations of any UK Government be? Please select UP TO 3. (n=4,173)

| Statement                                                                                                                                                    | Con | Green | Labour | Lib Dem | Reform | Restore | Would not vote | UK av. |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|---------|----------------|--------|
| Jobs for the new generation: To build up a new generation of homegrown scientists through massive investment in state schools and universities               | 42% | 60%   | 52%    | 53%     | 42%    | 42%     | 36%            | 47%    |
| Talent retention: To offer high salaries and world-class facilities so we stop the best British scientists being poached by the US or Europe                 | 44% | 34%   | 39%    | 39%     | 39%    | 39%     | 29%            | 38%    |
| Domestic job prioritisation: To encourage UK research labs and tech firms to hire qualified British science graduates ahead of international applicants      | 39% | 30%   | 36%    | 32%     | 47%    | 53%     | 31%            | 37%    |
| Global collaboration: To work together with international partners on global challenges like pandemics, climate change, and space exploration                | 26% | 41%   | 37%    | 43%     | 15%    | 15%     | 21%            | 29%    |
| Global excellence: To ensure the UK leads the world and sits comfortably among the top tier of scientific nations                                            | 30% | 26%   | 34%    | 33%     | 28%    | 24%     | 22%            | 28%    |
| Attracting the best scientists from around the world: To create frictionless visa pathways that attract the world's best international researchers to the UK | 28% | 25%   | 32%    | 35%     | 24%    | 15%     | 17%            | 25%    |
| Commercialisation: To commercialise ideas and inventions that are created in the UK, to keep science and technology companies and their profits here         | 27% | 14%   | 21%    | 22%     | 27%    | 21%     | 14%            | 21%    |
| International student pipeline: To keep our universities world class by attracting talented international students to study and do research here             | 11% | 15%   | 15%    | 12%     | 8%     | 4%      | 10%            | 11%    |
| None of these - the government should not be prioritising or funding scientific research over other immediate national needs                                 | 6%  | 7%    | 4%     | 3%      | 14%    | 12%     | 24%            | 11%    |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Quantitative research: Broad support for R&D amid divisive issues

**Figure 13: Voter groups' views on which technologies should be investment priorities**

Governments don't have unlimited budgets and must choose which areas of science, technology, and innovation to back with public money. From the list below, which sectors do you believe the UK should prioritise for major investment moving forward? Please select UP TO THREE. (n=4,173)

| Technology                                                                                                 | Con | Green | Labour | Lib Dem | Reform | Restore Britain | UK av. |
|------------------------------------------------------------------------------------------------------------|-----|-------|--------|---------|--------|-----------------|--------|
| Biology and medical technologies (e.g. new medicines and treatments)                                       | 55% | 62%   | 61%    | 68%     | 52%    | 51%             | 57%    |
| Defence and security technologies (e.g. sensors to detect threats or drone technologies to protect the UK) | 65% | 27%   | 47%    | 53%     | 64%    | 60%             | 48%    |
| Clean energy technologies (e.g. advanced batteries or cheaper solar panels)                                | 33% | 72%   | 55%    | 60%     | 24%    | 23%             | 44%    |
| Finance and banking technologies (e.g. new tools to rapidly detect fraud)                                  | 30% | 16%   | 20%    | 25%     | 27%    | 27%             | 23%    |
| High-tech manufacturing technologies (e.g. new materials for lighter aeroplanes)                           | 18% | 23%   | 26%    | 22%     | 22%    | 23%             | 21%    |
| Digital technologies (e.g. AI and next generation computers)                                               | 23% | 16%   | 28%    | 20%     | 21%    | 14%             | 21%    |
| Business and services technologies (e.g. tools to reduce disruption in supply chains)                      | 21% | 19%   | 18%    | 16%     | 18%    | 20%             | 18%    |
| Creative and media technologies (e.g. realistic graphics for computer games and movies)                    | 10% | 18%   | 11%    | 7%      | 6%     | 8%              | 10%    |
| No Investment - the government should not be investing public money in any specific scientific sectors     | 5%  | 5%    | 3%     | 3%      | 10%    | 9%              | 8%     |

Source: Icaro and Yonder Data Solutions polling for CaSE • July 2026 • Created with Datawrapper

## Conclusions and recommendations

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**CaSE began this project to understand how the visibly shifting voter landscape in Britain would impact the R&D sector**, and to generate insights that could help R&D advocates to navigate unfamiliar terrain. This required us to explore the frustrations, hopes and daily experiences that are driving political change, and hear in people's own words how R&D does or doesn't fit into this picture.

The results emphasise that R&D is not yet a politicised issue, but that the risk is not hypothetical. We cannot be complacent about public or political support for R&D, and a refreshed narrative alone will not be sufficient to fundamentally change things – we must also transform how we act.

Advocates must balance a need to prepare for the next UK General Election in only a few years' time with an equally pressing need to build a genuine relationship with the public.

This concluding section brings together evidence from the four research phases to consider the implications for our sector, and what our next steps should be. Our recommendations for the R&D sector focus first on how we engage, offering advice on how to create compelling narratives, and then on how we act, setting out the changes that will help earn lasting public support.

### Fragmentation is creating a new political landscape

The British political system has changed markedly in recent years: it is no longer primarily a two-party system. The axis of British politics has shifted from economic class towards education, age and cultural values.

We now see five – or even six – parties gaining sizeable chunks of voter share. Challenger parties have emerged at both ends of the political spectrum, appealing to disengaged and disenchanted voters. Their success is a symptom of a perceived accountability vacuum, rather than its cause. For Reform in particular, the party's voters are united more by shared grievances than ideology.

Overall, two voting blocs have emerged, with fluidity across a right-wing bloc of the Conservatives, Reform UK and Restore Britain, and a left-wing bloc of Labour, Greens and Liberal Democrats. However, these blocs have porous edges: a meaningful minority of 2024 Conservative voters would still consider the Liberal Democrats or Labour, and 2024 Labour voters show openness to multiple parties.

At the same time, variation within these blocs is often as large as the differences between them. For example, a segment of Reform UK's youngest supporters is measurably less negative about climate change and more open to global engagement than a segment of the Conservative Party's older base.

This fragmenting voter landscape requires R&D advocates to break from familiar approaches and engage across a much broader political and voter base than before. Our sector has compelling stories to tell, trusted messengers and pockets of genuine connection – but these assets aren't being resourced sufficiently, or applied consistently, leaving the public to connect the dots together themselves. The R&D community must redouble efforts to connect with people in this increasingly fractured landscape.

### Voters are united by pessimism, but divided by its causes

Large swathes of the electorate are united by a sense of pessimism and anxiety – about features of everyday life, and the country or world as a whole. Three-quarters agree the world is at a dangerous point and many participants expressed the view Britain was a divided and troubled society. But, despite a shared diagnosis of the problem, voter groups hold very different views on the root causes and solutions. This is observed most strongly for the topic of immigration, which has emerged as the single most polarising issue in British politics.

Meanwhile, attitudes towards governments and institutions have moved from scepticism to contempt, and repeated scandals have solidified the idea they work for the few not the many. Science has weathered this crisis of trust relatively well, but some hold concerns about universities, primarily whether a degree delivers genuine value.

The R&D sector is not entitled to the public's trust or support, and we must not assume we are immune to the effects of increasing levels of pessimism across society. R&D advocates must actively demonstrate trustworthy behaviours, and do more to demonstrate how R&D is serving people and society. But pockets of hope exist for voters, including around R&D – offering an opportunity to frame our sector and its work as a source of hope and solutions to fix "Broken Britain".

## Conclusions and recommendations

### R&D enjoys broad public support, but this consensus is at risk

R&D manages to attract support even across a fragmented electorate. Support for Government investment never drops below a majority for any voter group tested, and researchers, scientists and universities are trusted messengers on R&D. Similarly, British science and ingenuity is notably high as a pocket of hope among voters.

However, support for R&D is shallow. Awareness is low across every voter group, and participants struggled to relate R&D to the problems they face in everyday life – or see how it could help them achieve their ambitions. Specific framings also create fractures. Defence and pharmaceutical R&D are less supported by Green voters but resonate more among Reform UK and Conservative voters, while climate and clean energy divides opinions the other way.

In the absence of personal familiarity or tangible examples of R&D to draw on, people fall back on wider beliefs and attitudes to help them form opinions. In the qualitative research we saw participants asked about R&D investment express sceptical views about wasteful government spending and self-interest drawn from non-R&D examples.

The R&D sector faces advocacy dilemmas. While generic messages appeal to broad audiences, a lack of specificity creates only shallow connections; but a narrative framed around issues risks alienating some voter groups. And, while instinctive levels of support are broad, they are likely to be too shallow to sustain public support if put under sustained political pressure. Support for R&D will need to be driven by specificity, transparency and accountability, alongside tangible benefits.

### Recommendations

The findings in this report make it clear that R&D advocates must reconsider how we act to ensure that we work in ways that can earn lasting public support, and how we engage to ensure we reach voters across society with compelling narratives. Both are vital: we must reach people in the here and now, while recognising that long-term support won't result from narratives alone.

Within the sector, we've already seen changes that acknowledge the need to shift how we work and communicate – ranging from the recent restructuring of UKRI's portfolio, to institutions adopting mission-led strategies, and even the introduction of impact into the 2014 Research Excellence Framework. These all speak to a desire to align with societal priorities, be more accountable, and communicate our impact to wider audiences.

We have further to go. The reforms needed will take time and need broad buy-in, but that should not be a reason to delay. Our recommendations offer practical advice on how to engage and ways to start the process of longer-term change.

### How we act

- 1. The R&D sector must proactively listen to the public, partnering with them to make our work better.** We must reform our sector's cultures and practices to renew our social contract with the public. This means creating spaces and mechanisms to truly listen to the public and their experiences, and investing in the tools and evidence sources we need to stay responsive to evolving societal priorities.
- 2. The R&D sector must open up the research process by better valuing and resourcing public participation.** We must embrace public involvement and participation in research – in the right ways and at the right times – and acknowledge that the sector can feel closed, self-serving and elite to some groups. The sector should explore how these goals might be supported by increasing political appetite for devolution, which could bring R&D investment decisions closer to home for the public.
- 3. The R&D sector must prioritise and incentivise trustworthy behaviours.** We must meet the public's demand for specificity and accountability about what we do, why priorities are chosen, and who delivers research. This should be supported by meaningful transparency and respectful engagement across the whole R&D system.
- 4. The R&D sector must explore and evaluate ways to collaboratively put insights into practice.** To build on this research, the R&D sector should pursue a deeper exploration of polarising topics and narrative development to support collaborative engagement, and run place-based pilots to trial new and different approaches with partners across local areas. All future work should incorporate strong evaluation and the sharing of best practice from the outset.

## Conclusions and recommendations

### How we engage

**1. The R&D sector must flip the “Broken Britain” narrative and position R&D as a source of hope.** There is a major, cross-politics opportunity for our sector to offer a story of optimism to both voters and parties. R&D must be framed as a tool for fixing the problems that matter to the public, drawing on our sector’s wealth of stories to make that impact feel tangible.

**2. The R&D sector must make its case outside crisis moments.** The sector’s most united and visible political advocacy tends to happen around moments of pressure or crisis, such as cuts to investment. Although vital, defensive moments aren’t a good platform for a broader narrative about hope. R&D advocates must extend this collective mindset beyond these crisis moments, to offer a consistent and positive narrative in our daily political engagement.

**3. The R&D sector must adapt its messaging to suit a new voter landscape, and avoid stereotyping voter groups.** CaSE’s research reveals the themes and topics that resonate with different voter groups (see box), which the sector should use to inform our approach to advocacy – including allowing for the variations we see within voter groups and blocs.

**4. The R&D sector must create and champion narratives that make R&D feel more human, more local and more relatable.** A sceptical electorate, tired of political spin and perceived bias, will not be won over by abstract arguments. As set out in CaSE’s Guide for Engaging the Public, our sector’s messaging needs to demonstrate that R&D is solving real problems, helping the next generation, relevant to real life and benefitting local areas. These messages should be championed by R&D voices, as authentic and trusted messengers.

It is vital that the sector remains responsive to public attitudes towards R&D, and CaSE is committed to supporting the sector to achieve this. We will continue to invest in generating robust, detailed evidence and convening R&D organisations to respond to the findings. The vision for the R&D sector in 2045, developed in collaboration with the sector as part of our Reimagining R&D project, is a core part of this process.

### R&D messaging for a new voter landscape

- **Conservative voters:** Frame R&D as a national strength and tool for security, bring business into the conversation and avoid leading with wealth redistribution or green economy framings.
- **Green voters:** Frame R&D as a tool for a cleaner, greener society, and show how R&D can tackle challenges associated with finances, housing and jobs. Emphasise the international, collaborative and diverse nature of R&D, while being conscious of how to bring business, defence and AI into the conversation.
- **Labour voters:** Frame R&D as a tool to tackle society’s problems using tangible examples; broad messaging should work for this supportive group. Emphasise global links and job creation at home. Think about how to tailor messages within the voter base, acknowledging the fluidity of this group.
- **Liberal Democrats voters:** Frame R&D as a toll to tackle society’s problems and support policymaking, positioning R&D as a source of hope; broad messaging should work for this supportive group. Emphasise environmental and international links.
- **Reform voters:** Frame R&D as a vital tool in the UK’s recovery plan, leading with jobs and self-sufficiency, and demonstrate how R&D is helping tackle crime on a national and local level. Appeal to national pride, showing R&D as a source of hope and talk about both homegrown as well as international talent.

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# Methodology

The research adopted a mixed methods approach, involving a desk review, exploratory and small scale qualitative research with 25 participants, and a large survey of 4,173 UK adults.

## 1. Evidence review

The first phase of the project, in early 2026, was a review of existing sources. This was not intended to achieve the academic standards of a formal Rapid Evidence Assessment, nor provide an authoritative review of the literature. Instead, it represented a purposeful selection of sources by the project team, informed by a call for evidence across the R&D sector.

CaSE undertook the initial triage of sources, with 25 shortlisted and provided to the research team. These sources included national social attitudes tracking, studies of populist right and populist left support, voter segmentation and tactical voting analysis, and cross-cutting analyses of party fragmentation and institutional trust.

Alongside the 25 external sources, two recent CaSE studies were included. This included a formal re-analysis of the PARD25 data (through the lens of vote intention as well as demographic sub-groups within each voter group, e.g. Male Reform UK vs. female Reform UK; 18-34 Green vs. 55+ Green; Conservatives with a degree vs. Conservative with GCSE/O-Level).

## 2. Qualitative exploratory research

25 participants took part in exploratory qualitative research answering questions through selfie videos, using a dedicated 'in the moment' research app called Indeemo.

### Recruitment

Recruitment of participants was undertaken according to a recruitment questionnaire and using the specialist qualitative recruitment agency, Leftfield. The recruitment questionnaire performs two roles: the first to screen out participants who work in certain industries (e.g. market research) or have participated in more than a certain number of market research events in the past six months; the second to set quotas to guide the composition of the sample.

The primary quota variable was vote intention: participants were recruited across the political spectrum (6 Labour; 5 Reform; 5 Green; 4 Conservative; 3 Liberal Democrats; 2 would not vote). Beyond this, secondary quotas were as follows:

- Gender (50:50 split)
- Age (a mix of ages from 21-70)
- Socioeconomic grade (a mix across AB, C1, C2, DE)
- Ethnicity (representation of White and BAME groups)

### Task design

Eleven questions (or "tasks") were pre-determined. Participants answered these across a one week fieldwork period, at times convenient to them. Each participant invested around 1.5 hours in total answering the tasks. Fieldwork was conducted from 20 May – 01 June 2026.

Thirteen participants completed the exercises alone and 12 were invited to complete some jointly with a partner, friend or family member, allowing us to see voters discussing these subjects with each other.

Of the 11 tasks, eight had nothing to do with R&D. There was a very natural 'flow' of tasks that focused on participants, their lives, their local area, and "where they're at" (i.e. how they were feeling, their daily frustrations, their views towards the UK as a whole and opportunities for them and their family, who they would vote for and why). R&D was introduced unprimed and in the form of a headline that we knew could be triggering for some. Symbolism was used in addition to direct questioning.

### Analysis

Analysis of qualitative data was carried out through detailed readings of the transcripts, identifying broad themes and language used by the participants, and looking for patterns in how participants respond to the specific questions. We have aimed to present any quotations from the qualitative work with as much context as possible, to ensure these can be reliably interpreted. We note again that this is a small, exploratory sample. Its value lies not in statistical generalisability but in the depth of insights and its ability to bring findings to life. While the political spectrum is fully represented, it is dangerous to generalise to the views of each voting group based on the very small sample sizes that formed part of this element of the research.

# Methodology

## 3. Quantitative research

### Sample

4,173 interviews were conducted online with adults aged 18+ using Yonder Data Solution's proprietary online panel "Y-Live". Fieldwork took place across 17-21 July 2026.

These panellists are recruited and agree to receive surveys periodically. Invitations for individual surveys are sent out according to the quota targets to control the sample profile, and respondents receive a small financial incentive (£1.00 per five minutes of survey time).

Quota targets were set on region, age, gender, work status and ethnicity to ensure that the sample reflects the known profile of the UK population on these demographic criteria. Minor shortfalls in achieving quota targets were addressed using RIM weighting post hoc.

### Providers

The research was led by Icaro, a Market Research Society (MRS) Company Partner. The panel provider was Yonder Data Solutions.

### Survey design

Survey questionnaires went through several rounds of iteration between Icaro and CaSE. Quantitative opinion data is always subject to a number of possible biases, most importantly a tendency for participants to agree with statements or "satisfice". To counteract this, the survey was designed to vary the types of questions shown, and incorporate binary choice scales and multi-select questions as well as agree-disagree Likert-style questions.

Attention was also given to the potential for sequencing bias and priming, with questions about awareness of the term R&D, for example, appearing early in the questionnaire.

### Reaching the sample

Participants were recruited through online proprietary panel providers, where individuals register their interest in taking part in online research in return for incentives. By their nature, online samples exclude those with low levels of digital access, however they enable strong control over the demographic make-up of the final sample.

The sample is targeted to be representative of the UK public according to the chosen quotas. All surveys are subject to some level of recruitment bias, where those who are interested in taking part may represent a more "engaged" group of people than if the selection was truly random. By reaching the sample through online panels, incentives can be tailored to meet specific groups to encourage the participation of those who are less likely to volunteer.

The survey featured attentional checks for inattentive responding, using trap questions where participants are instructed to select a specific answer option in order to proceed, and open-response questions which are retrospectively assessed for "nonsense" responding. All surveys also feature "reCAPTCHA" checks for bots, to prevent surveys being flooded by scripted responses, with a second check for such problems during analysis of any open responses.

### Analysis

Full access to the data tables is provided from CaSE's website (see [Download the Data](#)), broken down by demographic groups. We have adopted a convention that sample sizes of less than 100 are too small for meaningful analysis or to adequately represent the subgroup, and so they are avoided throughout our analysis.

All survey results are subject to margins of error (because a sample has been surveyed, unlike in a Census where everyone answers). Statistical tests have been undertaken to the 95% confidence level (i.e. 95 times out of 100 the observed difference will be real vs. 5 times out of 100 it will have happened by chance).

For this survey with a sample of 4,173, the maximum margin of error in the results is  $\pm 1.5\%$  (i.e. if the survey result is 50% then the 'real' result - if everyone in the UK was interviewed - would be in the range 48.5% - 51.5%).

NB. Statistical tests are only valid when the survey method has used random probability sampling. While the market research industry routinely applies the same logic to nonprobability samples, like this survey, this must be done with appropriate caveats - including an acknowledgement that confidence limits are, technically speaking, not possible to calculate. Any reference in this report to statistically significant differences should be used to accurately guide the interpretation of trends and differences in the data, rather than be taken to be objective statistical fact.

These vote intention figures are drawn from our own general population survey and are not the output of a dedicated political opinion poll. They should not be compared directly with, or read alongside, published voting intention polls. Unlike polls conducted by British Polling Council (BPC) member organisations, our figures have not been adjusted for a respondent's certainty or likelihood to vote, for known patterns of differential non-response by political affiliation (sometimes termed "shy voter" effects), or rebased to exclude "don't know" or "would not vote" responses, as is standard practice for headline voting intention polling. We use this question to segment our sample by political affiliation for analysis, not to estimate election outcomes.



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