PF Global

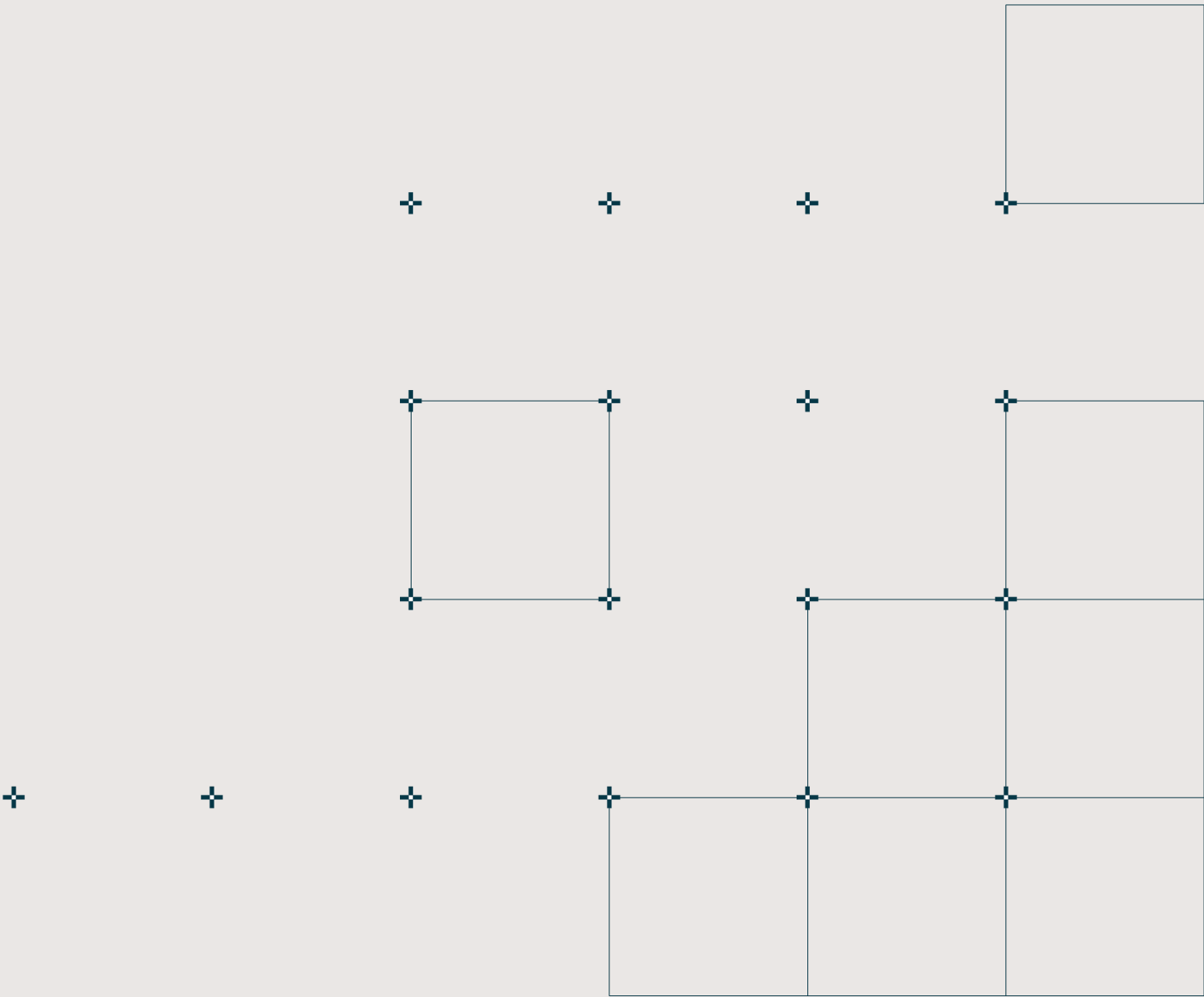
Advice | Research | Argument

The road back to victory

A review of Welsh Labour's performance in the 2026 Senedd elections

Review · November 2026

Commissioned by Welsh Labour



Contents

Executive summary 03

Forewords 06

01 Introduction: the result 08

02 A long drift: the weakening of Labour ties in Wales 11

03 From bounce to bust: what changed when Labour governed in Westminster 21

04 The final year: Caerphilly and the campaign 33

05 The path back to power: what Welsh Labour should do next 46

About the research 54

References 55

Executive summary

In May 2026, Welsh Labour suffered its worst ever defeat in a Senedd election, in a nation where the party has won the most votes at every general election since 1922 and has led every Welsh Government since 1999.

Welsh Labour commissioned this review to understand why, and to set out what the party should do next. It draws on a new poll of 1,387 adults in Wales, 20 interviews with people involved in the campaign, 161 member submissions, two focus groups and Welsh Labour's canvassing data. We also analyse decades of public polling and election results from across the UK, including the British Election Study and every Senedd election since 1999.

We find that a combination of forces drove the result in May. Long-term shifts had been eroding Welsh Labour's support base for years. Governing in both Cardiff Bay and Westminster then laid that vulnerability bare, as the party absorbed dissatisfaction with public services and the economy at both levels of administration. On top of this, weaknesses in political communication left the party without clear policy answers when voters wanted them.

Our aim has been to identify the key drivers of the defeat, not to assign blame. Interviewees are not named, and we do not attribute the result to any single decision, individual or part of the party. Rebuilding will require shared responsibility and a focus on the future rather than the past – with clarity over who holds the pen on each decision and improvement, and accountability for the quality of that work. The next months and years are an important opportunity for Welsh Labour to take stock and reset.

9%
of Senedd seats won by Welsh Labour, putting it third

26%
of Labour's 2021 or 2024 voters stuck with Welsh Labour

74%
of those who left do not rule out coming back

The key drivers of the result

01 A long-term progressive drift.

Over the past decade, Welsh Labour has kept its traditional supporters at Senedd elections but steadily lost progressive voters to other left-wing parties. Those who back Labour at Westminster but not in the Senedd tend to be younger, female, on lower incomes, living outside the Valleys and more Welsh than British, mirroring Labour's losses to the Greens in England.

02 Delivery over identity.

Voters who left Labour in 2026 said the party had not delivered on the NHS, the economy and the cost of living, despite governing in both Cardiff Bay and Westminster, with Welsh Labour sharing a brand with a historically unpopular UK Government for the first time in over a decade. While those leaving reported somewhat stronger Welsh identities, for most voters, 'standing up for Wales' still means getting those everyday, left-of-centre priorities right, and Welsh Labour was seen to have fallen short.

03 A campaign in a difficult climate.

After the Caerphilly by-election, voters saw the Senedd election as a contest between Plaid Cymru and Reform, and many Labour voters switched to Plaid to stop Reform. Welsh Labour's campaign broadly resembled those of previous years but failed to persuade these voters to return, struggling to shake the sense that Welsh Labour was already on the back foot. As poll ratings and volunteer numbers fell, voter contact dropped below any recent election outside the pandemic. Candidates felt the selection timetable left them little time to build a profile, and digital output had less cut-through.

Welsh Labour is at a critical juncture. Almost half (46%) of Welsh adults would consider voting for Welsh Labour again in the future, even if only 12% say they definitely would. Moreover, nearly three-quarters (74%) of those who stopped voting for the party in May do not rule out returning. In other words, voters are still open to hearing what Welsh Labour has to say. Our review makes five recommendations.

Our recommendations

01 **Define a clearer relationship with UK Labour.**	This includes joint action where objectives align, as well as the ability to make a distinct Welsh case where priorities differ.
02 **Rebuild the base with an understanding of who left, and why.**	Understand and seek to rebuild a rapport with progressive voters who have left the party over shared values.
03 **Be Welsh on Labour's terms.**	Prioritise what voters in Wales value most: the NHS, the economy, and cost of living. Arguments for more devolved powers should be made when there is a clear case that they would improve those everyday priorities.
04 **Define the party's leader and offer early.**	Introduce new message carriers and a policy agenda before opponents can define them.
05 **Strengthen the campaign machine for a new electoral era.**	Closed lists make candidates harder to know, so select them earlier and promote them alongside the leader, with clear ownership of digital and more capacity where list seats are now winnable.

Welsh Labour has over a generation of experience with winning elections in Wales. Doing so again means reconnecting with the party's existing understanding of what voters care about most, and holding to a clear political strategy built on this understanding as well as a long-term track record of competence.

Professor Anand Menon
Professor of European Politics and Foreign Affairs, King's College London

Foreword

Ken Skates MS

Leader of Welsh Labour

Many who left us remain willing to listen. We must earn that hearing.

May's election was a profound defeat for Welsh Labour. Behind the result were people who had placed their trust in us, sometimes over generations, and who no longer believed we were offering the change they needed. We must listen to that judgement with humility and respond with purpose.

We commissioned this independent review because rebuilding trust begins with understanding why it was lost. I thank Professor Anand Menon and his team, and everyone who contributed their experiences and views. Their findings demand serious reflection and action across our party.

The message running through this report is clear. People want a Welsh Labour Party that understands their lives, stands up for their communities and delivers on what matters: an NHS they can rely on, secure jobs, decent homes and relief from the cost of living.

Our task is to show how our values can meet those needs today. We should be proud of what Labour has achieved for Wales, while being honest about where we fell short and ambitious about what must change.

Under my leadership, Welsh Labour will fight relentlessly in the pursuit of health and wealth for all in Wales. We will work with colleagues across Britain wherever we can advance our shared ambitions and speak plainly where Welsh interests require a different approach. Our commitment to devolution must mean bringing power closer to people and making government more accountable for results.

We will be a constructive, challenging opposition, scrutinising the Welsh Government and developing a credible alternative rooted in communities across Wales.

This review also offers grounds for hope. Many who left us remain willing to listen. We must earn that hearing through our conduct, our priorities and the strength of our offer.

That work starts now. Together, we can build a Welsh Labour Party worthy of renewed trust and ready to serve every part of Wales.

Ken Skates MS
Leader of Welsh Labour

Foreword

Joe Lock

General Secretary of Welsh Labour

> This review provides a starting point; our responsibility now is to put it into practice.

Welsh Labour commissioned this review to ensure that the lessons of May's defeat are understood and acted upon. Its purpose is to give our party an honest assessment of what happened and a practical foundation for rebuilding.

I am grateful to Professor Anand Menon and his team for their work, and to the members, candidates, elected representatives, trade union colleagues and staff who contributed. Their willingness to speak candidly reflects a shared determination to see Welsh Labour recover.

I also want to recognise everyone who campaigned through an exceptionally difficult election. Their commitment to their communities and to our movement deserves our thanks. We owe them an organisation that learns, supports them effectively and gives their efforts the best chance of success.

The review examines political, electoral, and organisational challenges that developed over time. Our response must address how these fit together. A clear political offer, consistent communication and effective campaigning depend on shared priorities, timely decisions, and clear responsibilities.

As General Secretary, my commitment is to turn the organisational lessons into practical change, working with our Leader, Welsh Executive Committee, and the wider movement. That means earlier preparation, stronger support for candidates and local parties, and training that equips members to campaign confidently. It means integrating digital communication with organising, giving teams clear direction and the authority to deliver, and adapting our approach to the new electoral system.

We must also strengthen the everyday relationships through which trust grows: in workplaces, neighbourhoods, councils, and local parties across Wales.

The next stage requires a clear programme of action, agreed responsibilities and regular scrutiny of progress. Members must be able to see what is changing and contribute to that work.

Rebuilding will take sustained effort from us all. This review provides a starting point; our responsibility now is to put it into practice.

Joe Lock
General Secretary of Welsh Labour

01

Introduction: the result

This review uses new research to explain why Welsh Labour lost, separating national from local causes and long-term from recent ones.

Its aim is to understand the result through the data and to make practical recommendations for the path back to government. Chapter 2 covers the long-term weakening of Labour's ties in Wales and who it lost, Chapter 3 looks at the effect of Labour governing in Westminster, and Chapter 4 focuses on the final year in the run-up to elections, including the Caerphilly by-election. Chapter 5 sets out recommendations.

2026 marked a low point for Welsh Labour in the Senedd

Welsh Labour has led every Welsh Government since the first Senedd election in 1999, winning between 43% and 50% of the seats each time.

On 7 May 2026 the party won just 9 out of 96 seats – a 9% seat share, from 11.1% of the vote. This amounts to less than a third of its 36.2% regional list vote in 2021. In the same election, Plaid won 43 seats and Reform UK, in second place, 34. Rhun ap Iorwerth became First Minister at the head of a Plaid minority government (Figure 1.1).

National unpopularity explains much of this result, but not all of it

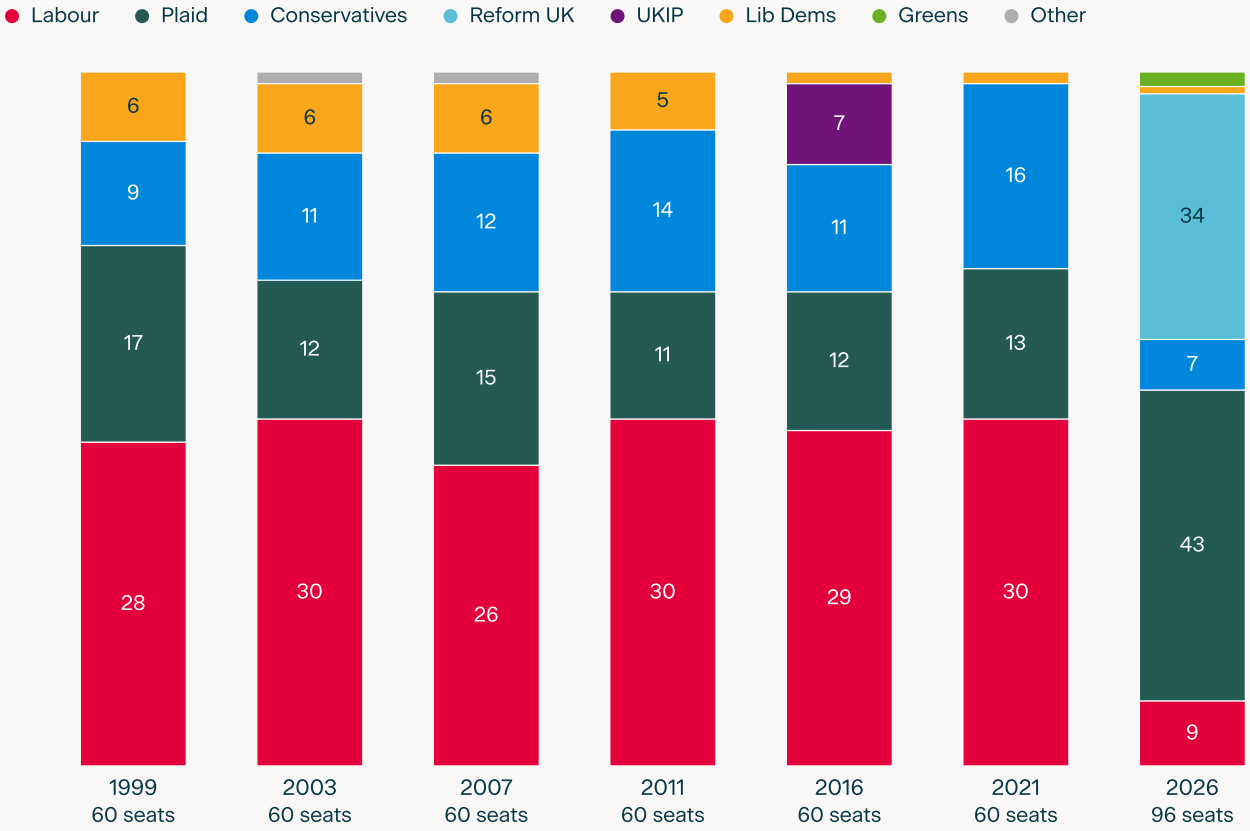
Devolved and local elections turn on national as well as local issues. PF Global polling generally finds that national issues in the UK account for between a third and a half of voters' reasons for their choice at these elections.

Some of the 2026 result therefore reflects Labour's unpopularity across Britain. Labour's projected national share at the local elections held on the same day was 17%, its lowest on record. At previous Senedd elections it was between 27% and 36% (Figure 1.2).

Figure 1.1

Welsh Labour fell from first place to third, with 9 of 96 seats

Seats won by each party at Senedd elections, as a share of the chamber. The chamber grew from 60 to 96 seats in 2026.



Source: Senedd Research; Commons Library; PF Global analysis.

From 2003 to 2021 Welsh Labour ran ahead of Labour's projected national share at every Senedd election, reflecting consistent support in one of Labour's traditional heartlands. In 2026 that lead turned into a deficit for the first time in over two decades, running 5.9 points below an already poor projected national share. The Senedd result reflects the loss of that edge on top of the national party's unpopularity (Figure 1.3).

Explainer

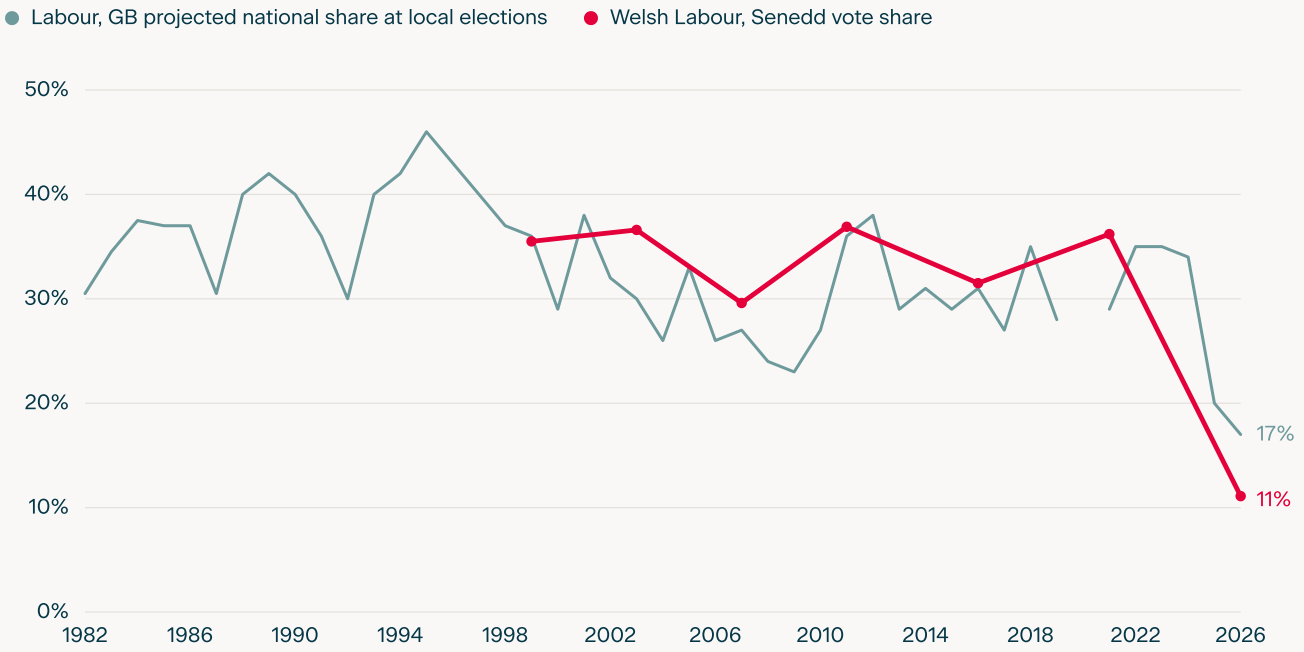
What is projected national share?

The BBC's estimate of each party's share of the vote had local elections been held across Great Britain, based on results in a sample of wards. Because different areas vote each year, it is used to gauge how a party would have done nationally and to compare local elections from year to year.

Figure 1.2

Labour's GB standing fell to its lowest since 1982, and Welsh Labour fell further

Labour's projected national share at GB local elections, 1982 to 2026, and Welsh Labour's Senedd vote share.

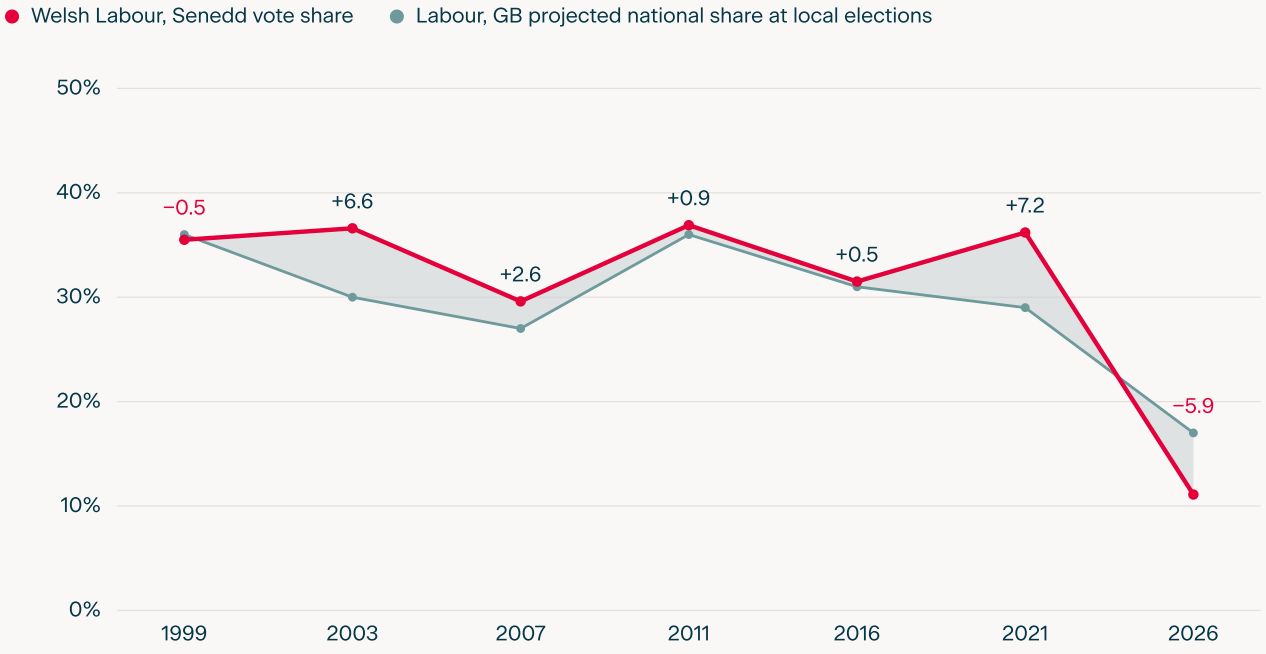


Source: BBC projected national share via LocalBase; Senedd Research; PF Global analysis.

Figure 1.3

Welsh Labour ran ahead of Labour's GB standing from 2003 to 2021, then fell 5.9 points below it

Welsh Labour's Senedd vote share against Labour's GB projected national share at the local elections held the same day.



Source: Senedd Research; Commons Library; PF Global analysis.

02

A long drift: the weakening of Labour ties in Wales

Over the last decade, Labour has struggled to retain its core Westminster voter base in the Senedd.

Long-run data shows that those who vote Labour at both Westminster and Senedd elections are a traditional core: older, homeowning voters in the Valleys, often former trade union members from ex-mining communities. People who vote Labour at Westminster but not in the Senedd, meanwhile, are younger, female, live on lower incomes, reside outside the Valleys and identify more strongly as Welsh. Elsewhere in the UK, voters like these have been more willing to back other parties of the left, and in Wales they are leaving Labour – typically for Plaid (Figure 2.1).

Many of these voters lack the inherited, generational loyalty of Labour's core, judging the party more on delivery. Among those who switched in 2026, women were far more likely than men to say cutting NHS waiting times would win them back (51% compared to 34%), while under-35s put the cost of living and the NHS first and were the most likely to cite affordable housing.

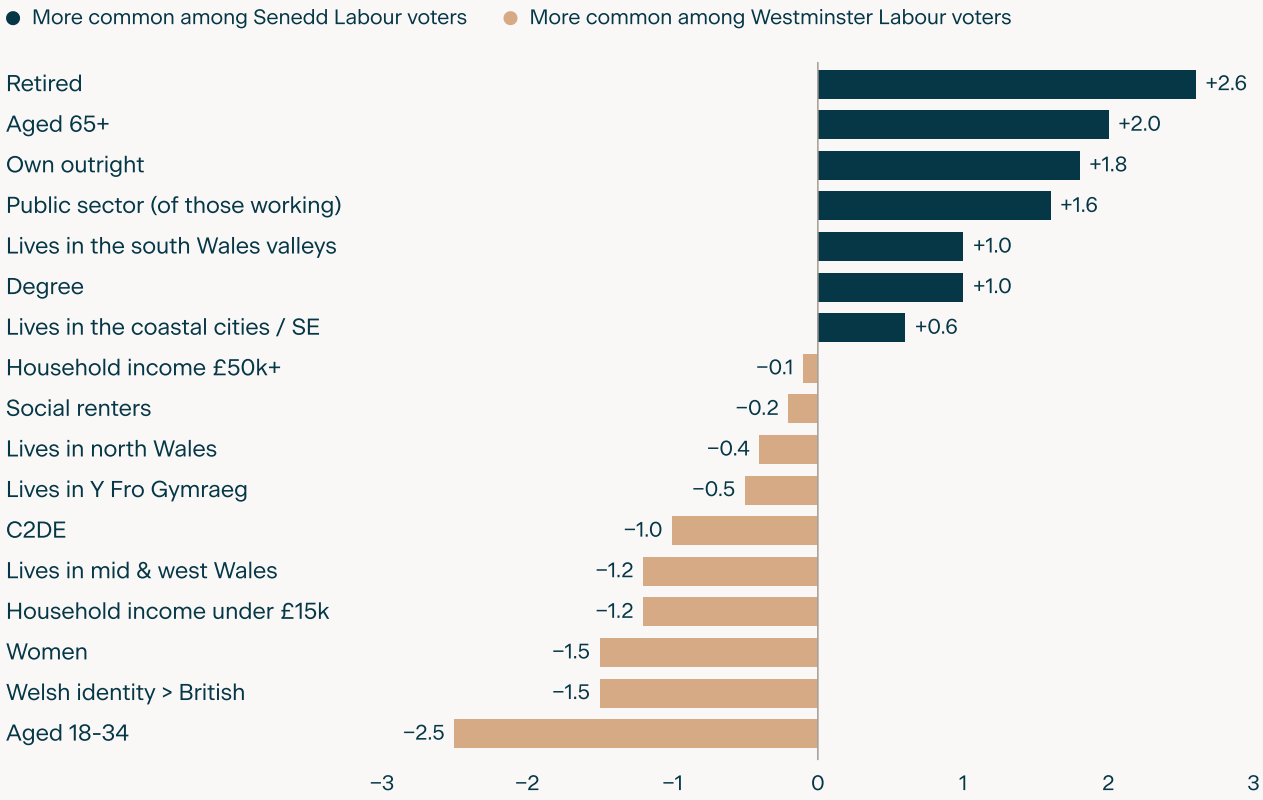
Appealing to these voters again is a key part of rebuilding an electoral coalition. As they tend to be more online and more geographically mobile than Labour's core voter coalition in the Senedd, reaching them will need new campaign techniques, and a clearer account of what Welsh Labour is and what it stands for.

> **"I'm not sure they lost my support, but there was a need for change. Both Welsh Labour and Plaid have policies and views that I agree with.**
>
> **Labour to Plaid voter, female, 62, Mid and West Wales**

Figure 2.1

The voters Labour loses in the Senedd are younger, poorer and identify more strongly as Welsh

Composition of Labour's Senedd voters minus its Westminster voters, percentage points, average of seven paired readings, 2015 to 2024.



Source: British Election Study internet panel, Welsh respondents.

Even as Wales has remained more economically left-wing than the rest of Britain

Welsh voters typically report a higher level of concern than the British average about the cost of living, poverty and the NHS, and are more supportive of income redistribution. On social and cultural questions they are close to the UK average.

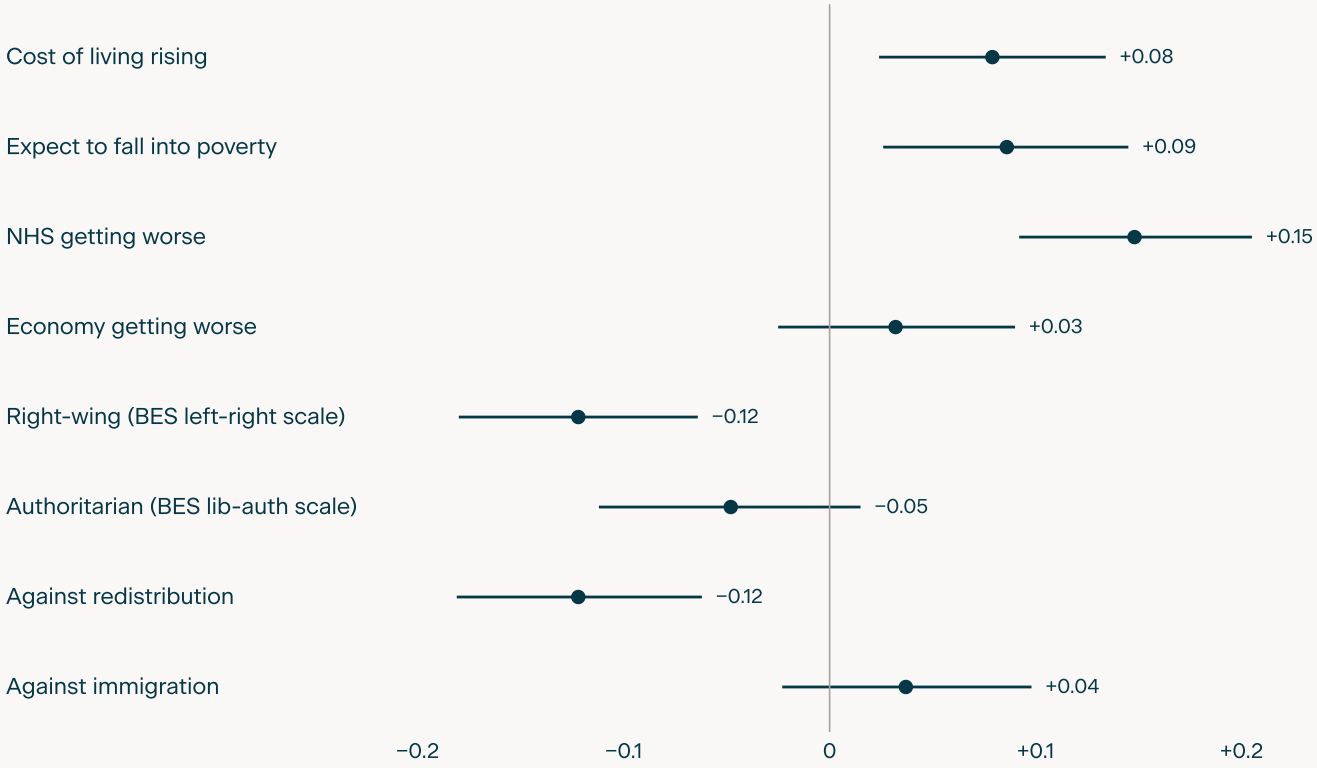
This is favourable ground for Labour, and many people see left-of-centre economics as part of being Welsh (Figure 2.2).

> "Wales as a country is definitely more left-leaning with its... traditional trade union kind of background."
>
> Welsh Labour interviewee

Figure 2.2

Wales is materially distinctive, not ideologically distinctive

Wales against the GB average, May 2025: material conditions (top four) and political outlook (bottom four). Distance from the GB average in standard deviations; bars are 95% intervals.



Source: British Election Study internet panel, Welsh respondents.

Accordingly, Welsh Labour kept just a quarter of its voters in 2026, with a third leaving to Plaid

Of those who voted Labour in at least one of the last Senedd elections in 2021 or the last general election in 2024, just a quarter (26%) voted Welsh Labour again in May. A third (34%) voted Plaid, and a further 11% voted Reform.

As well as struggling to keep its core voter coalition, Welsh Labour picked up very few new supporters: 89% of Welsh Labour's 2026 voters had backed the party in 2021 or 2024. Almost half (47%) of Plaid's 2026 voters, meanwhile, had voted Labour in 2021 or 2024 (Figures 2.3 and 2.4).

26%

of Labour's 2021 or 2024 voters voted Welsh Labour again in May

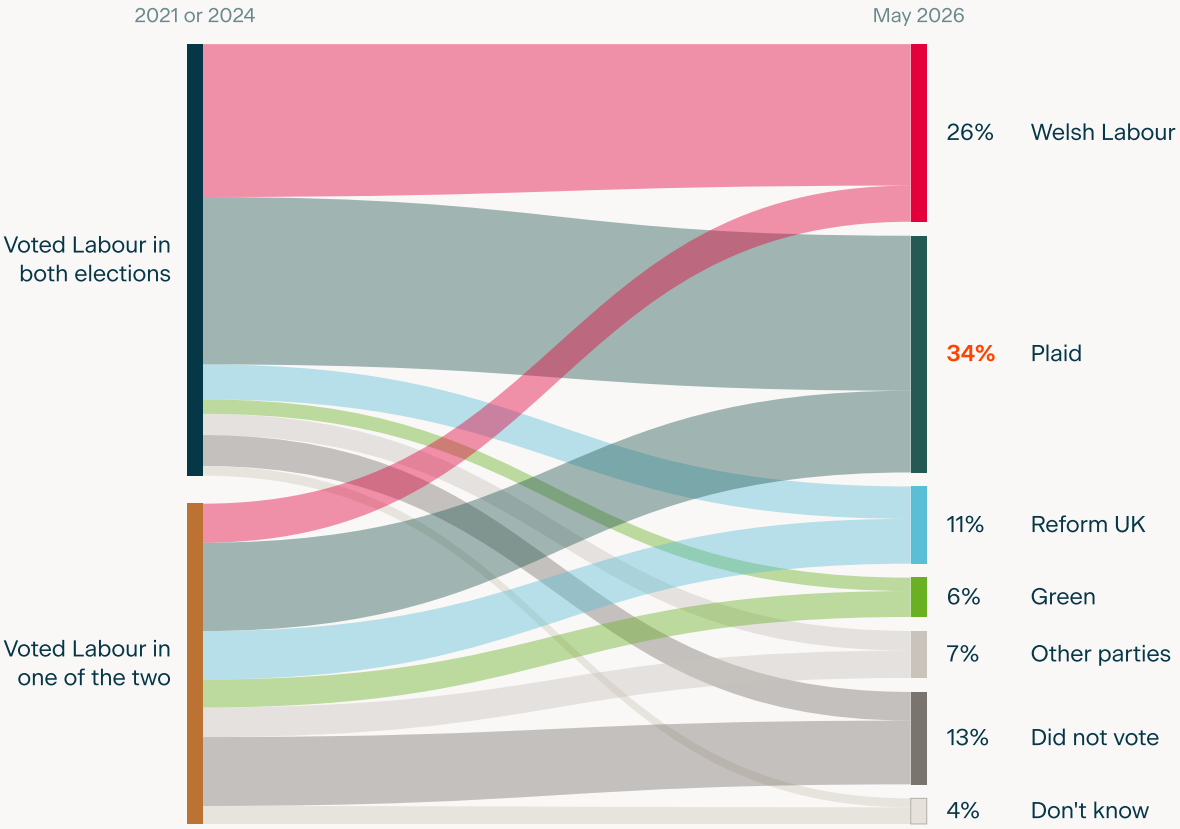
47%

of Plaid's 2026 voters had voted Labour in 2021 or 2024

Figure 2.3

Three quarters of Labour's past voters went elsewhere in May 2026

May 2026 Senedd vote of people who voted Labour in the 2024 general election or the 2021 Senedd election. Band widths show the share of all past Labour voters.

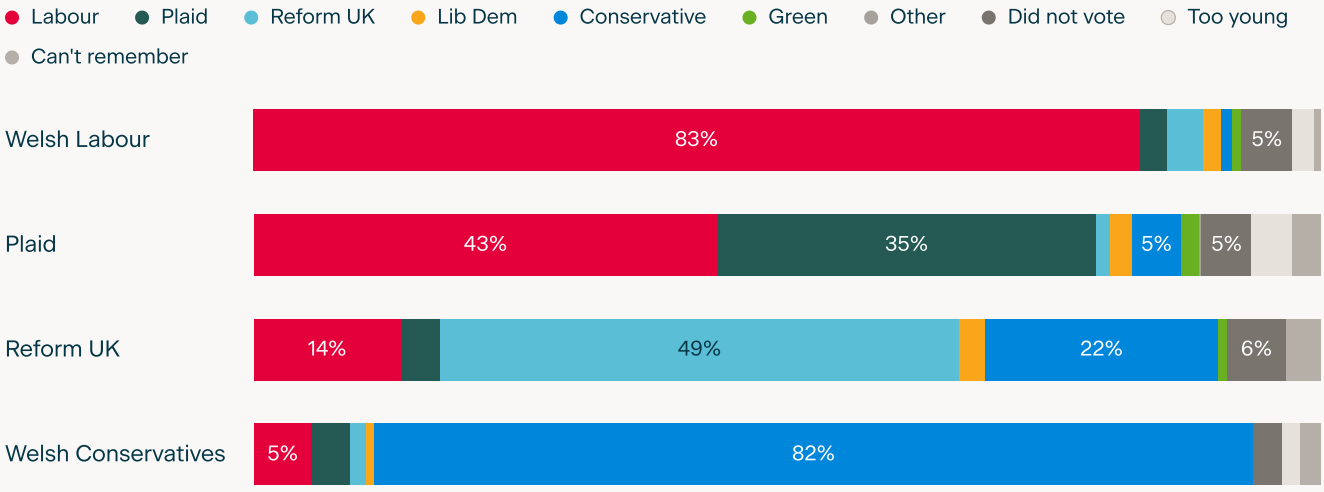


Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Figure 2.4

More of Plaid's 2026 voters had backed Labour in 2024 than Plaid

2024 general election vote of each party's May 2026 Senedd voters.

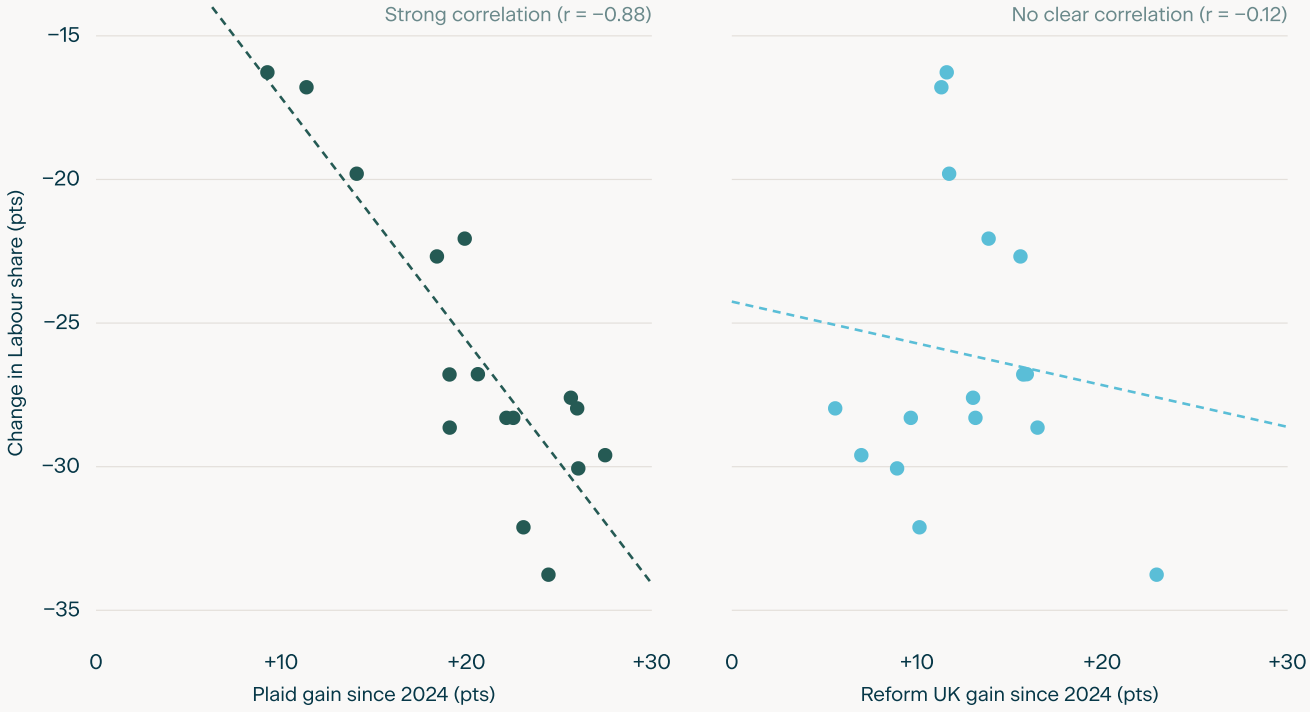


Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Figure 2.5

Labour fell furthest where Plaid advanced, and no further where Reform did

Change in Labour's vote share since the 2024 general election against each challenger's gain, percentage points. Each dot is a Senedd constituency.



Source: Senedd 2026 constituency results and 2024 General Election results; PF Global analysis.

In focus

Did Welsh Labour lose the election to Reform?

Reform took fewer of Labour's voters than Plaid did: just 11% of Labour's 2021 and 2024 voters backed Reform in May, compared to 34% who backed Plaid. As Figure 2.5 shows, Welsh Labour's vote fell most where Plaid gained most, while there is no clear relationship between Welsh Labour's losses and Reform's gains.

Welsh Labour did lose two close seats to Reform, missing out by 247 votes in Blaenau Gwent Caerffili Rhymni and 267 in Clwyd. Overall, however, votes lost to Reform were no more costly in seats than those lost to Plaid. Our modelling finds that had every Labour-to-Reform switcher stayed, Welsh Labour would have won about 13 seats rather than 9. Winning back the same number of votes from Plaid would have delivered 14 seats, assuming in both cases that returning votes follow the distribution of Labour's votes in previous elections.

Moreover, 2026 Labour-to-Reform switchers have left the party more often in the past – just over half did not vote Labour in the 2019 general election – and are also less likely to return. Indicative data from our poll suggests around three in five Labour-to-Reform switchers (62%) would never vote Welsh Labour again, against 14% of Labour-to-Plaid switchers.

Immigration accounts for losses to Reform rather than to Plaid: 60% of Reform voters say it contributed a great deal to Welsh Labour's defeat, against 26% of Labour-to-Plaid switchers.

Most of those who left describe a gradual change of view

Over a third (36%) of Labour voters who switched parties in 2026 say that their view of Welsh Labour changed over the last year or two and almost a quarter (23%) say over several years.

Members and interviewees described the same pattern from their experiences of interacting with voters and voter data: support among Welsh Labour's base had been falling since around 2019, and the 2021 result – helped by Mark Drakeford's handling of the pandemic – obscured the trend (Figure 2.6).

> "Because Welsh Labour have got complacent and let us down. I wholeheartedly disagree with everything Tories stand for and would hate for my children and grandchildren to grow up in the world that Reform are trying to create so I voted Plaid as agree with some policies and felt it was the best tactical vote to keep Reform out.
>
> **Labour to Plaid voter, female, 43, Cardiff and South Central Wales**

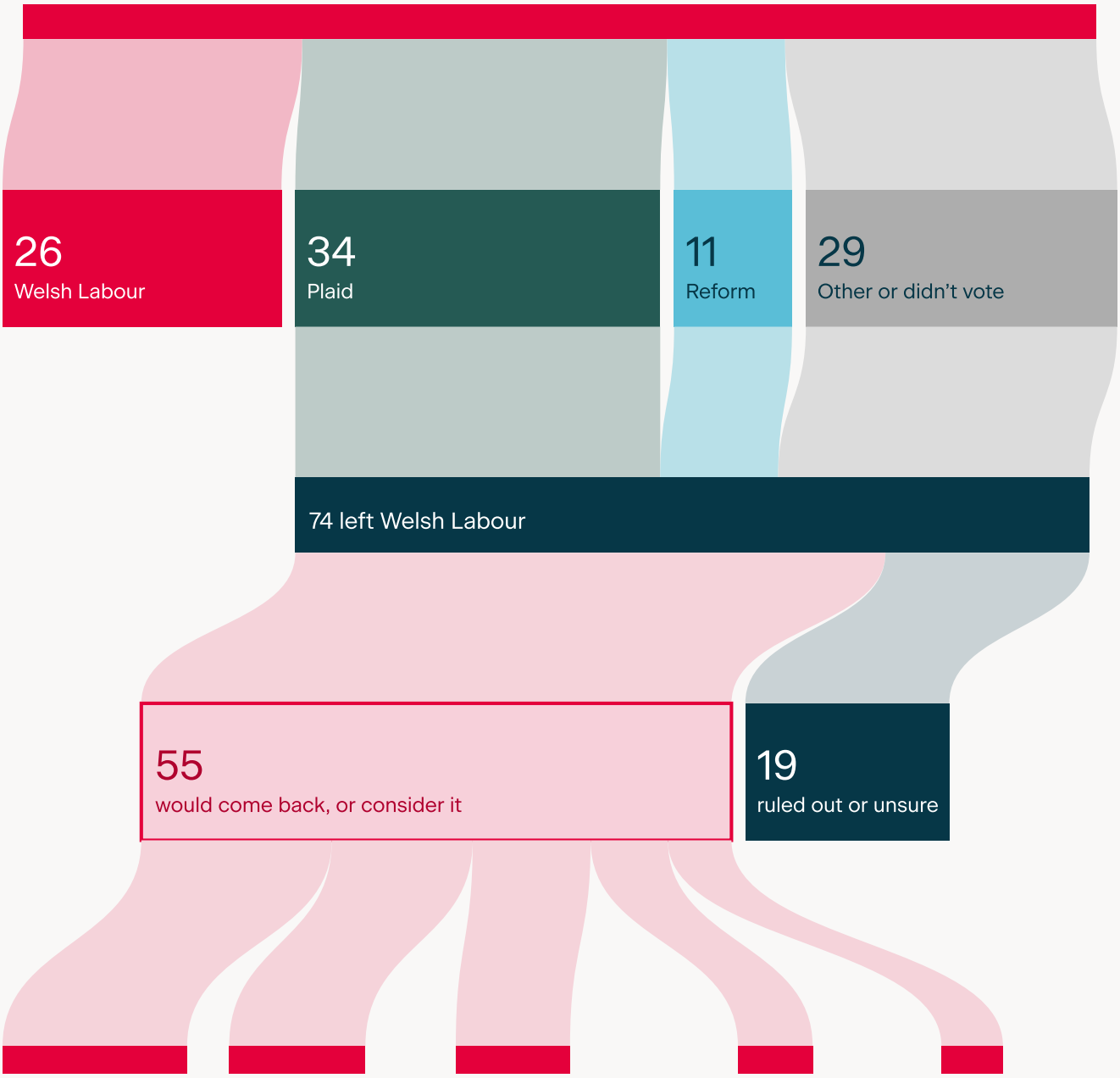
Left-leaning voters may choose between Welsh Labour and Plaid in the Senedd based on who represents Wales better

Some scholars describe Welsh politics as running along two dimensions – Welsh versus British identity and economic left versus right – arguing that this has left room for three platforms: Labour, Plaid and the Conservatives (Scully and Wyn Jones, 2012).[1] Others put more weight on which party voters trust to deliver on key issues (Clarke et al., 2004).[2]

Where did Labour's voters go, and where could they go next?

Out of every 100 people in Wales who voted Labour at the 2021 Senedd or 2024 general election.

100 people who voted Labour in 2021 or 2024



42% say cutting NHS waiting times would win them back — 1st

31% act on the cost of living — 2nd

26% plan for the economy and jobs — 3rd

...

17% tougher on immigration — 7th

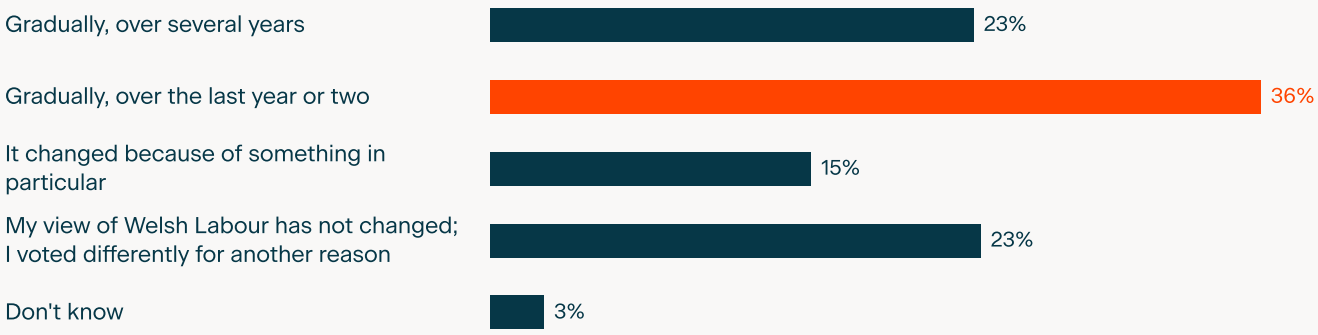
14% scrap or change 20mph — 9th

Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026. Flows shown out of 100 and rounded. Base for what would win them back: Labour leavers who voted for another party, who could pick up to three of 18 options, so the branches overlap; grey numbers show each option's rank.

Figure 2.6

Most switchers fell out with Welsh Labour gradually, not over one event

Did your view of Welsh Labour change gradually, or because of something in particular? 2021 or 2024 Labour voters who voted for another party in May 2026.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

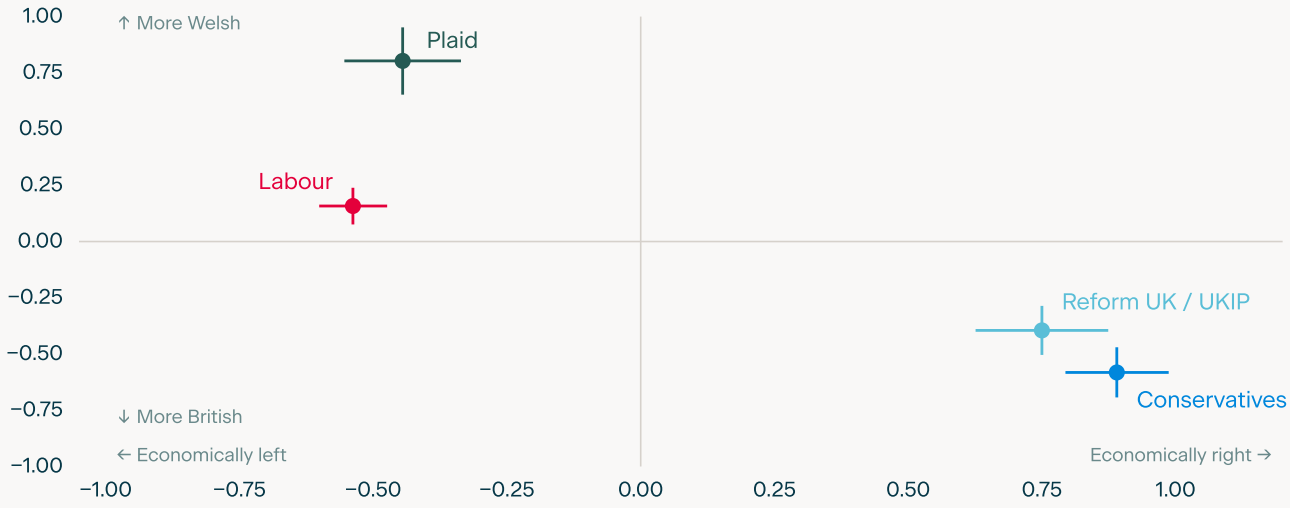
When comparing voter attitudes towards both of these questions, Labour and Plaid supporters hold similar economic views and differ somewhat on identity – positions which have been stable for a decade. This tends to give Labour a comparative advantage when the economy is salient, and Plaid when identity or distance from Westminster is.[3]

Our poll fits that picture: in 2026, Welsh Labour trails Plaid by four to five points on the NHS and the economy, but by 28 points on standing up for Wales (Figure 4.4). However, it is important to understand what voters see 'standing up for Wales' to mean (Figures 2.7 and 2.8).

Figure 2.7

Economics separates Labour and Plaid from the right; identity separates Labour from Plaid

Average position of each party's voters, Welsh respondents, July 2024. Bars are 95% intervals.

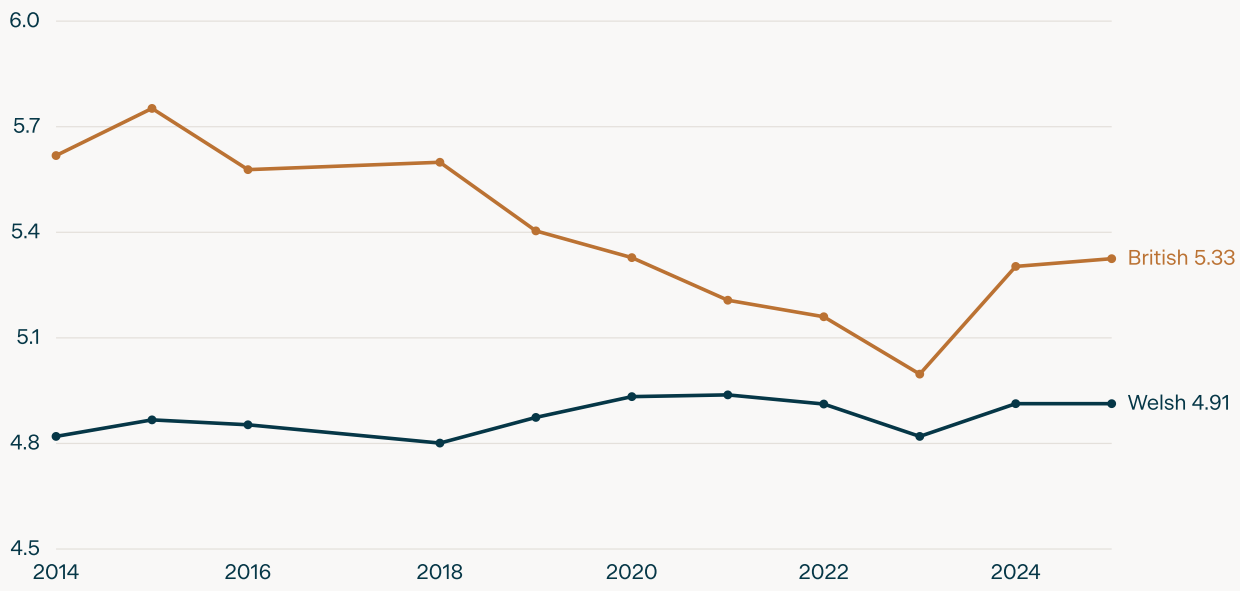


Source: British Election Study internet panel, Welsh respondents.

Figure 2.8

Self-reported British and Welsh identity has remained relatively stable over the last decade

Average strength of each identity on a 1 to 7 scale, the same Welsh respondents throughout.



Source: British Election Study internet panel, Welsh respondents.

In focus

Was this result about Welsh identity?

Not necessarily. The strength of Welsh identity, as reported by Welsh people themselves, has been flat for a decade.[5] British identity has also remained relatively stable, with any decline at broadly the same rate in every nation of Great Britain.

Support for Welsh independence in our poll is around a quarter, in line with YouGov polling since 2020 (18% to 26%) and only somewhat higher than in the mid-2010s (12% to 17%).[4] And while Labour supporters who were already considering Plaid at the start of this Parliament report strong nationalism, those who actually left Labour in 2026 feel as Welsh as Plaid's core voters but are less convinced on constitutional questions, sitting about halfway between the two parties on independence (Figure 2.9).[6]

This is not to say identity does not matter; Welsh Labour voters who switch to Plaid do score more strongly on their Welsh identity than those who stayed. Focus group participants also cited it as a reason for switching, objecting to "the lack of Labour standing up for Wales as a separate entity".

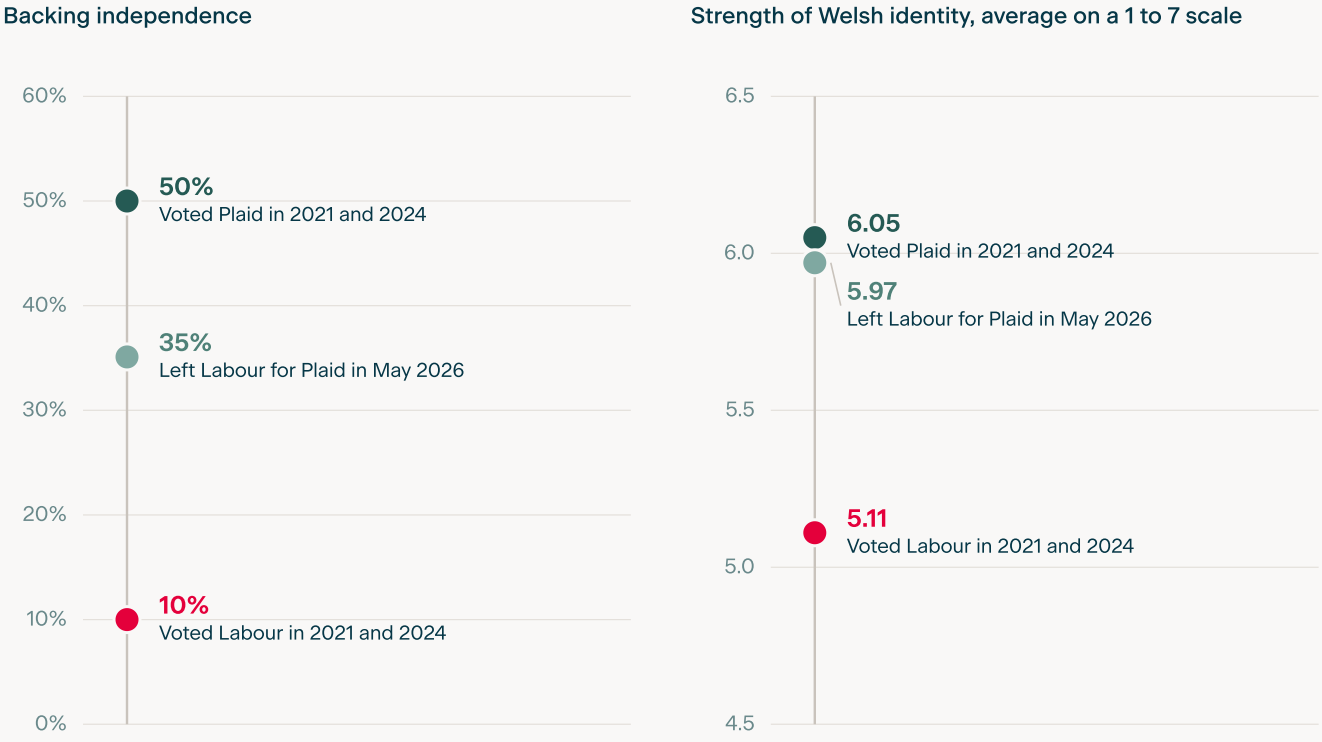
However, voters tend to judge whether a party stands up for Wales mainly on delivery: the NHS, the cost of living and the economy. For the median Welsh voter, identity operates through these issues more than through a clear demand for further devolution, independence or a focus on the Welsh language.

> They'd had 14 years to sort things out. And everything has got consistently worse. Education, NHS, social care, roads, cost of living.
>
> Focus group participant, Labour to Plaid, female, 50s, Bryneglwys

Figure 2.9

Labour's 2026 leavers feel as Welsh as Plaid's core vote, but are less convinced on independence

Welsh identity and support for independence, by past and current vote.



Source: British Election Study internet panel, Welsh respondents (voted Plaid, or voted Labour, at both the 2021 Senedd and 2024 general elections); PF Global poll of Wales, 1,387 adults, Aug to Sep 2026 (2021/2024 Labour voters who voted Plaid in May 2026). Independence is the share of everyone in each group who would vote yes.

03

From bounce to bust: what changed when Labour governed in Westminster

After more than a decade defining itself against a Conservative UK Government, Welsh Labour lost that contrast in 2026.

Between 2010 and 2024 Welsh Labour presented itself as Wales's defence against a Conservative UK Government. It won the most seats at every Senedd election in that period, and in 2021 ran 7.2 points ahead of Labour's national share. As one focus group participant put it: "It was always you got to keep the Conservatives out ... I just don't think that's the case anymore".

In 2026 Labour held power in both Cardiff Bay and Westminster for the first time since 2010, and controlled more Welsh councils than any other party. It was hard to argue that a sense of government failure could not be attributed to Labour.

> **For the first time in 15, 16 years, we went to the polls with a Labour government and a Labour government in Westminster, and there's nobody to deflect on... any failings that there are, it's really hard to pin on anybody else.**
>
> Welsh Labour campaign organiser

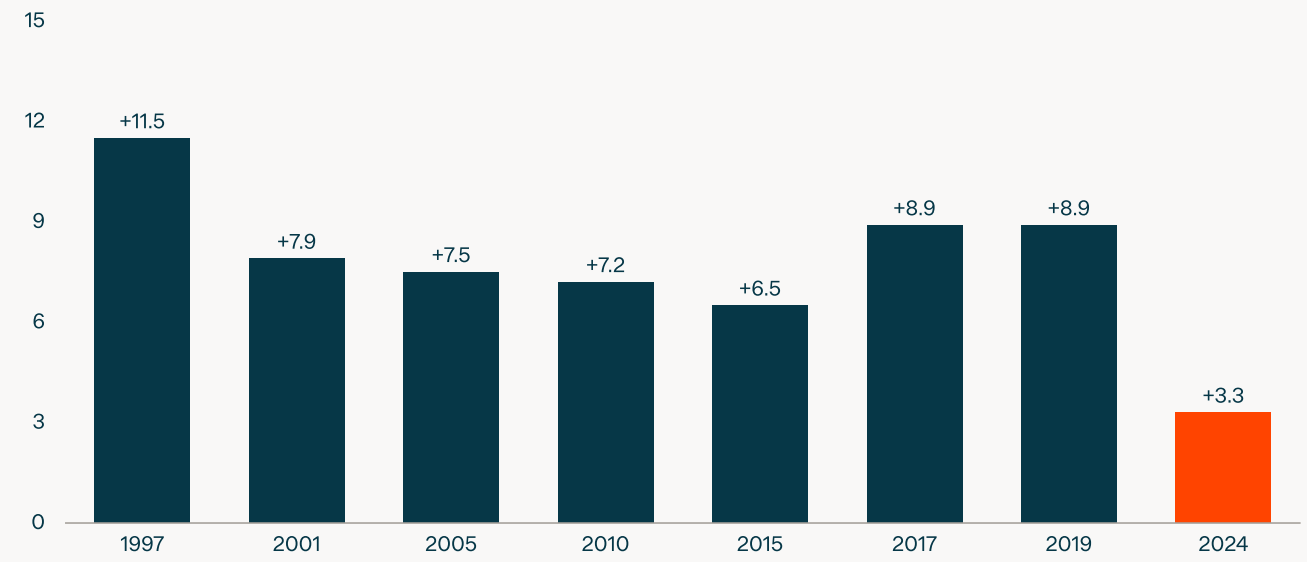
In any case, Labour's Welsh premium has been in long-term decline: at general elections, the party's vote share in Wales exceeded its UK-wide share by 11.5 percentage points in 1997, but just 3.3 points in 2024. This underlines the need to keep earning Welsh voters' support, rather than relying on the party's historic strength (Figure 3.1).

> **A lot of the issues that were being raised on the doorstep, like the NHS, like 20 mile an hour, there's not really that much you can do to counter that [when Labour's in charge].**
>
> Senior Welsh Labour campaign staff member

Figure 3.1

Labour's lead in Wales over its UK-wide vote share fell to 3.3 points in 2024

Labour's vote share in Wales minus its UK-wide share at general elections, percentage points, 1997 to 2024.



Source: Commons Library; PF Global analysis.

Under Blair, Welsh Labour held its lead while Labour governed in London, but this did not replicate in 2026

In 2003 and 2007, Welsh Labour outperformed UK Labour's projected national share at local elections (Figure 1.3), emerging as the largest party by a comfortable margin.

This was driven by Rhodri Morgan setting out "clear red water" between Cardiff and New Labour in Westminster in December 2002, grounded in policy distinctions between the two governments – especially regarding public services. In health, Wales phased out prescription charges and kept foundation hospitals and an internal market out of the NHS. In education, school league tables and most national tests were scrapped. Alongside these came free bus travel for pensioners, free school milk and free museum entry.

Eluned Morgan's "Red Welsh Way", adopted after the 2024 general election, recalled this earlier approach but was not its equivalent. It struggled to land on everyday policy, instead tied up in constitutional positioning and the relationship with Westminster. Demands such as transferring the Crown Estate and devolving policing did not speak to voters on the doorstep, who found themselves more concerned with the economy, cost of living, and the NHS.

The campaign also moved between this slogan and "Power in Partnership", which sent its own signals regarding governing relationship with UK Labour, but still did not provide clear policy objectives, whether in terms of common ground or differentiation.

In their words: On the doorstep

Members and interviewees described messaging that shifted during the campaign and did not reach voters.

> Lack of clear strategy – Power in Partnership and Clear Red Welsh Way. Which were we supposed to campaign on?
>
> Welsh Labour member and local post-holder

> We had no sense of a strategy, no one ever discussed with us what Welsh Labour actually wanted us to be talking about or focusing on.
>
> Welsh Labour member and local post-holder

> When you put it through the focus group, when you put it to the insight of this red Welsh way, it meant nothing to anybody... It didn't mean anything to people on the doorstep... without anything tangible to offer on the back of it.
>
> Senior Welsh Labour staff member

> I don't think our pledges grasped properly... I just don't think we really connected with our audience.
>
> Welsh Labour campaign staff member

> We had plenty of literature but the messaging did not seem to cut through.
>
> Welsh Labour member and local post-holder

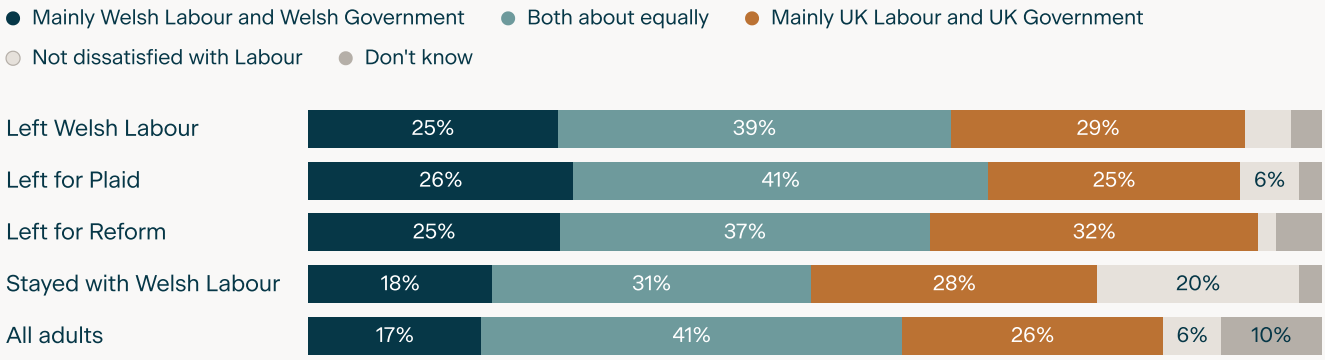
The unpopularity of the UK Government and Keir Starmer clearly weighed on the Senedd result

Almost a third (29%) of Labour voters who left the party in the 2026 Senedd elections say that their dissatisfaction was mainly driven by the UK Labour government. It was also the most common answer across the members we engaged with: asked why Welsh Labour lost, around 40% of members in our survey cited how voters felt about the UK Labour government and Starmer. In Welsh Labour's own canvassing, the share of people contacted who were Labour supporters fell sharply during Starmer's first year in office – from 51% in 2024 to 37% in 2025 – before a gradual drift to 33% in 2026, the lowest in the record (Figure 3.3).

Figure 3.2

Leavers blame both governments, Westminster slightly more so

Is any dissatisfaction you feel with Labour mainly about Welsh Labour and the Welsh Government, or UK Labour and the UK Government?

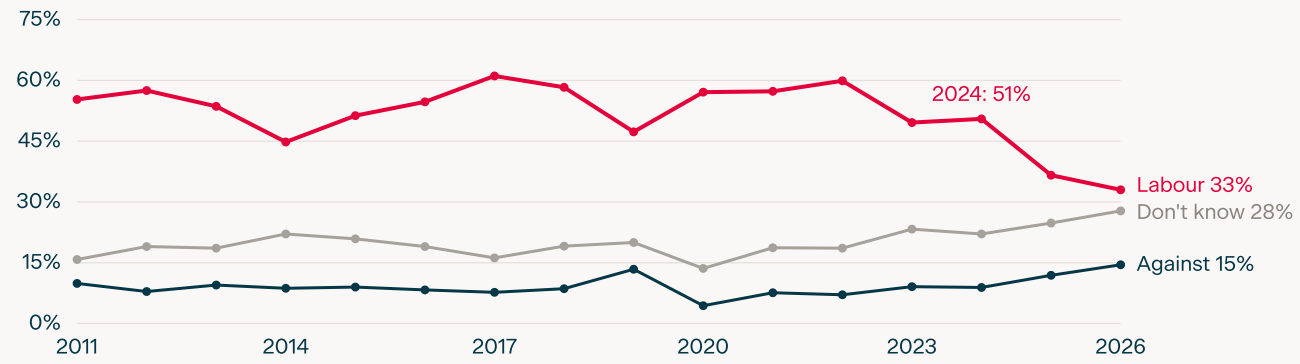


Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026. Base: 2021/2024 Labour voters who left or stayed.

Figure 3.3

Labour's share of canvass contacts fell from half in 2024 to a third in 2026

Share of Welsh Labour canvass contacts recorded as Labour, don't know and against, 2011 to 2026 (2026 covers January to July).



Source: Welsh Labour canvassing data; PF Global analysis.

But voters also held the Welsh Government responsible

Voters broadly understand the devolution settlement: just over a third of voters say they hold the Welsh Government responsible for devolved competencies like schools and the NHS, while only a tenth say the same for national issues like the cost of living and immigration.

Unsurprisingly then, after the UK Government, members' own most common explanations for why people did not vote Labour were Welsh Labour's time in power (37%) and the Welsh Government's record on public services (32%).

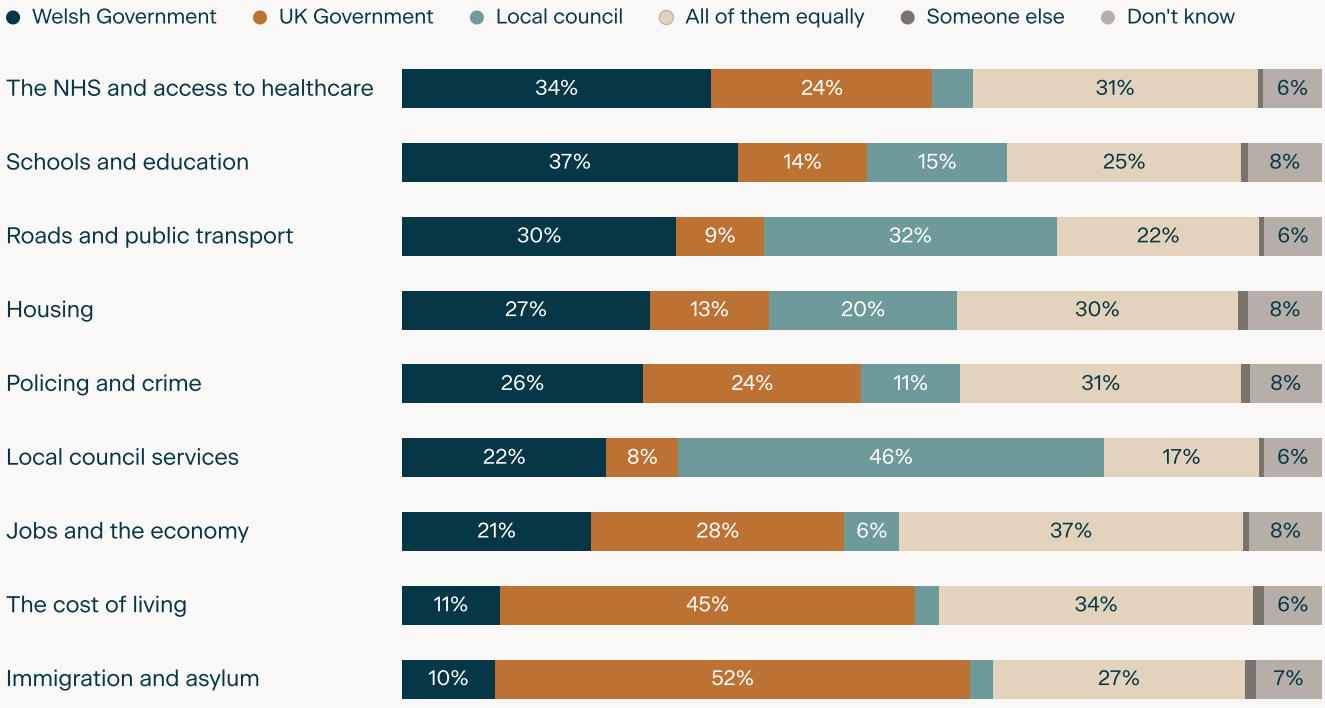
Our polling corroborates this: when voters who switched away from Labour in 2026 were asked what drove their dissatisfaction with the party, ultimately, the largest segment (39%) cited Welsh Labour and UK Labour equally (Figures 3.2 and 3.4).

> **They took us for granted thinking the peoples of Wales would always vote for them no matter what they did or didn't do.**
>
> Former Labour voter, female, 57, North Wales

Figure 3.4

Voters blame Cardiff for health and schools, and Westminster for living costs and immigration

Who voters think is mainly responsible for how each area is going in Wales.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

And Labour still polls better for Westminster than for the Senedd

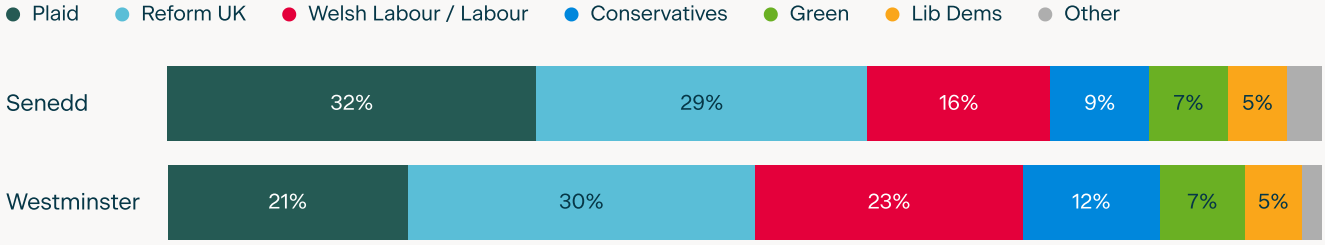
Among those naming a party, 23% say that, if there were an election tomorrow, they would vote Labour for Westminster, compared to just 16% for the Senedd. The divide is starker among Labour voters who switched their vote in May: just over a third would vote Labour at Westminster, but only 11% would vote Welsh Labour in another Senedd election. And almost half (48%) of Labour-to-Plaid switchers would come back to the party for a Westminster election. Many of these voters have left Welsh Labour in the Senedd, not Labour as a whole.

Labour's brand still counts, especially against established UK parties like the Conservatives at Westminster elections. Across the UK, devolved and local elections have seen some of the fastest and most consistent rises in third party vote share, where disaffected voters are more willing to consider outside options. With Senedd turnout now at a record high, Welsh Labour should expect these dynamics to shape Senedd elections more in years to come, not less (Figures 3.5 and 3.6).

Figure 3.5

Labour polls 7 points higher for Westminster than for the Senedd

Senedd and Westminster vote intention, among those naming a party. The Senedd question named Welsh Labour; the Westminster question named Labour.

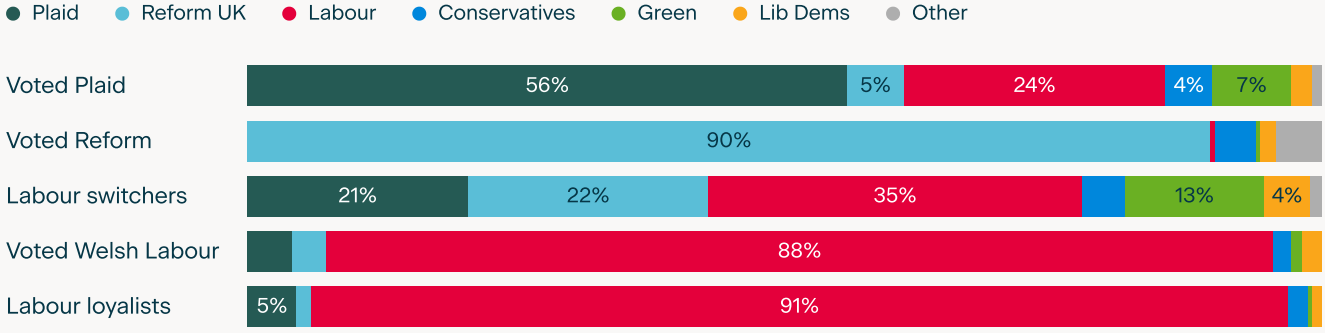


Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Figure 3.6

A third of Labour switchers would still vote Labour at Westminster

Westminster vote intention among those naming a party, by vote at the May 2026 Senedd election.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Burnham's premiership offers an opportunity to reset Labour's image with voters in Wales

Campaigners reported strong anti-Starmer feeling on the doorstep, with the winter fuel payment and welfare changes raised across Wales.

Andy Burnham's appointment as Prime Minister in July offers a chance to reset alongside the national party. 31% of Welsh adults view Burnham positively and 30% negatively (net +1), against a net rating of -41 for Keir Starmer. The gap is starker among Labour voters who switched in May: Burnham's net rating is +30, against -28 for Starmer.

+30

Andy Burnham's net rating among Labour voters who switched in May

−28

Keir Starmer's net rating among the same voters

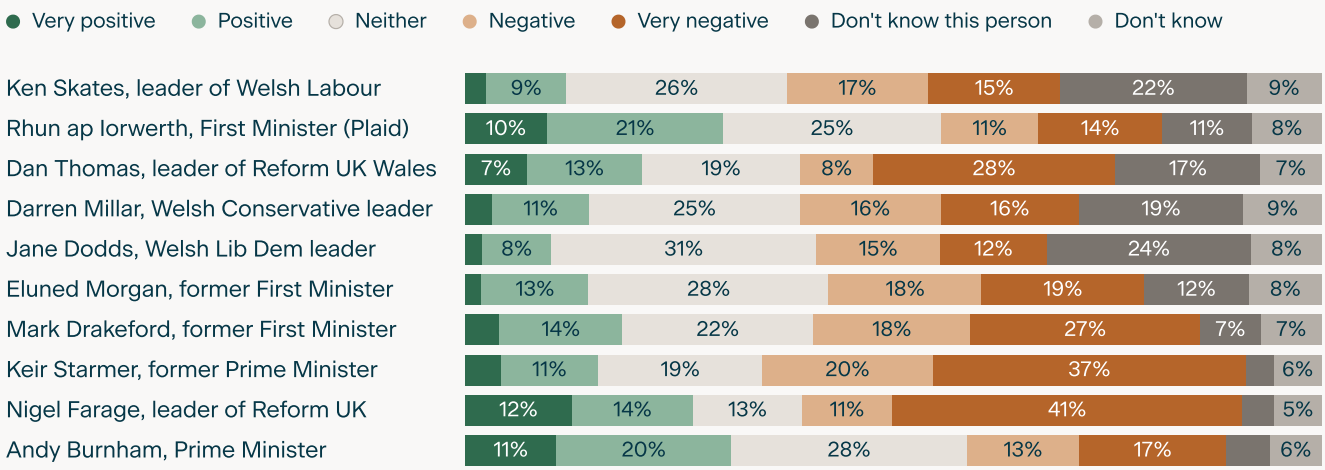
Overall, Welsh Labour's favourability ratings now track UK Labour's closely: a net rating of -25%, against -27% for UK Labour.

A new UK leader, particularly one seeking a more progressive approach to everyday concerns, offers Welsh Labour an opportunity to rebuild goodwill. Nonetheless, the party still needs to define a durable relationship with UK Labour that holds regardless of the national party's popularity (Figure 3.7).

Figure 3.7

Rhun ap Iorwerth is the only Welsh leader rated more positively than negatively

Opinion of each politician, all adults in Wales.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

In focus

Is this just what happens a generation into devolution?

In comparable devolved systems, established parties have often lost significant ground to challengers, particularly nationalist parties, around a generation into devolution.

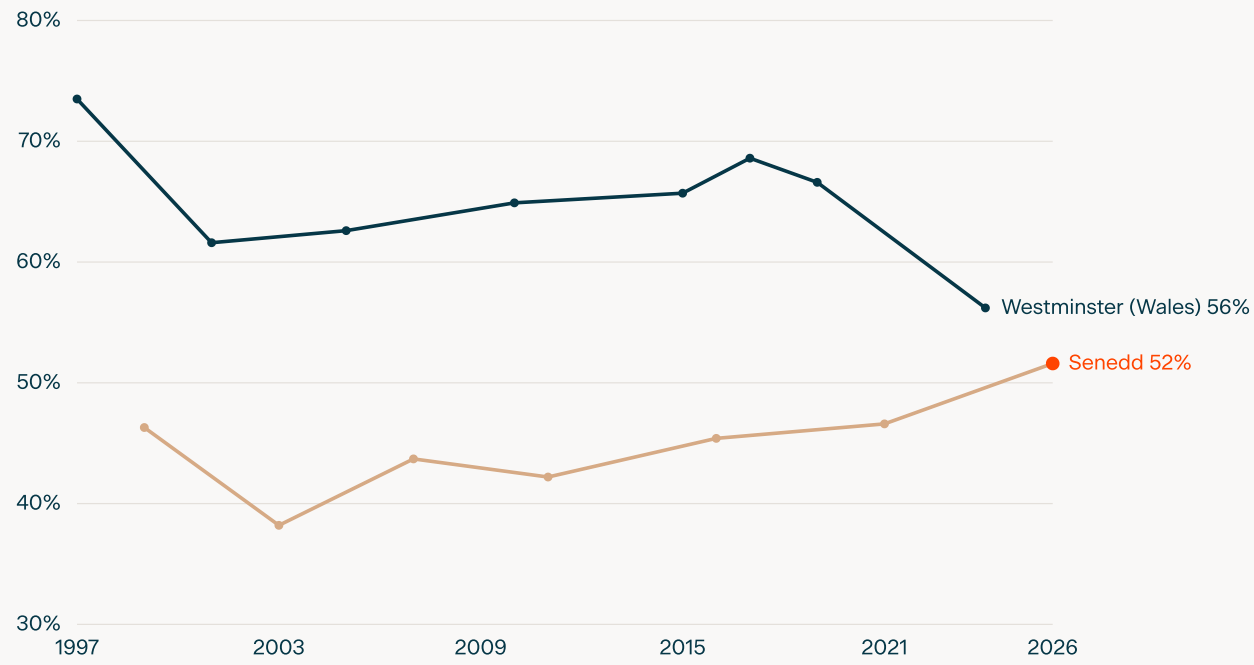
The closest practical comparators to Wales' devolution settlement are Scotland and the Spanish regions: each had an existing nationalist movement, gained legislative powers in the late twentieth century, and pursued self-rule tailored to the territory rather than a uniform settlement or shared rule at the centre.[7–13] As in the Scottish and Spanish cases, turnout in Senedd elections has also grown over time, coinciding with a period of relative disenfranchisement with the centre (Figure 3.8). The political trajectories of these regions offer useful lessons for Welsh Labour.

Our analysis shows that in these regions, party competition generally settles after the first few elections, sometimes becoming more volatile about a generation later as challengers establish themselves. Wales broadly follows this pattern, but the scale of the 2026 swing was unusually large: none of the other devolved elections we examined saw a larger one once shifting party alliances are accounted for (Figure 3.9).

Figure 3.8

Senedd turnout reached a record 52% in 2026 as Westminster turnout fell

Turnout in Wales at Senedd and Westminster elections, 1997 to 2026.



Source: Senedd Research; Commons Library; PF Global analysis.

In focus

Three paths after a challenger surge

Challenger surges in these systems have settled in different ways: in Scotland the challenger replaced the established party, in Galicia a moderate nationalist party displaced the centre-left, and in Catalonia voters returned to an established party as nationalist parties failed to deliver.

Catalonia. Catalan nationalism surged in response to growing confrontations with Madrid, including the Constitutional Court's 2010 curtailment of Catalonia's autonomy statute and Madrid's refusal to negotiate greater fiscal autonomy or an independence referendum (Rico and Liñeira, 2014).[14] Centre-right nationalist parties and the pro-independence ERC drew on these grievances in their campaigns, moving from pledging to demand a referendum once in government to promising independence within 18 months. When independence failed to materialise, nationalist parties split over how to proceed and their support gradually weakened (Ferreira, 2022). The centre-left Socialists (PSC) recovered through a more conciliatory approach: acknowledging demands for greater self-government, backing negotiation and reconciliation with Madrid, and refocusing politics on public services and effective government. They returned to power in 2024 at the expense of the pro-independence parties.

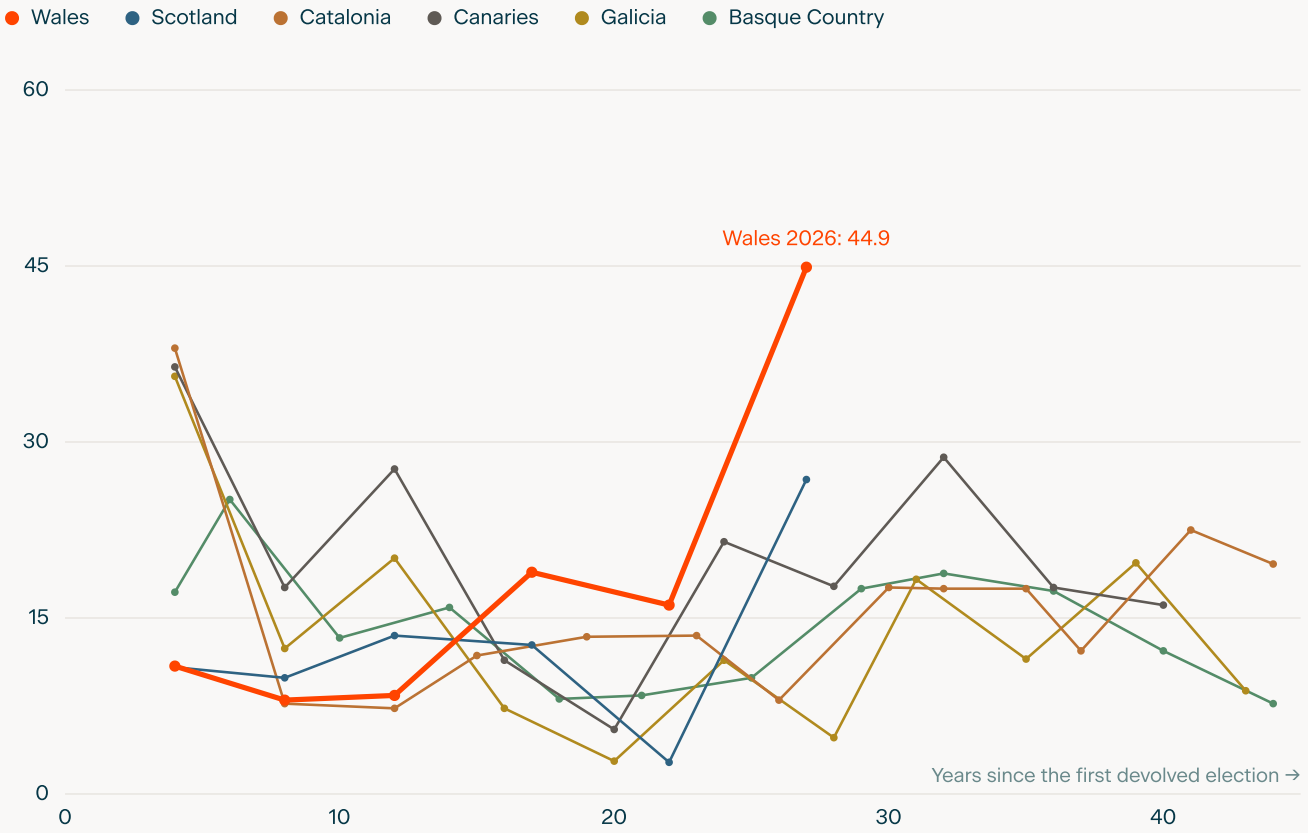
Scotland. The SNP overtook Labour in 2007, eight years after the first Holyrood election, and won an outright majority in 2011. Its breakthrough rested on perceived competence and leadership at least as much as on independence: voters rated Labour's record in office poorly and saw the SNP as the stronger voice for Scottish interests (Johns et al., 2009).[15] The 2014 referendum – which the SNP had promised as a way to win over more cautious proto-nationalists, and in which Labour campaigned on the same side as the Conservatives – then entrenched this realignment, with a notable migration of Labour voters to the SNP as a result. The SNP has been the largest party at every Holyrood election since 2007, drawing strength from defining itself as a broad-based home for Scottish interests, and grounding nationalist commitments in economics and delivery.[16–17]

Galicia. The nationalist BNG displaced the Socialists as the main opposition to the governing conservative People's Party in 2024. Unlike the Catalan nationalists, the BNG grew without promising independence, combining moderate nationalism and Galician language and culture with a credible left-wing programme on public services and economic development that attracted a wider range of left-leaning voters.[18] The Socialists were squeezed on both dimensions of competition: on the left–right axis, the BNG increasingly appeared the stronger alternative to the conservatives; on the nationalist–unionist axis, the Galician Socialists struggled to reconcile moderate regionalist stances on the question of identity with the Spanish Socialist government's accommodation of Catalan nationalism. Their eventual decision to converge with the BNG on regionalism arguably further weakened their distinct appeal, reinforcing the BNG's credibility and encouraging left-wing voters to consolidate behind it rather than return to the Socialists (González Rodríguez and Barreiro-Castro, 2025).[19]

Figure 3.9

Wales's 2026 swing was the largest of any devolved system we examined

Pedersen volatility against the previous devolved election (points), by years since the first election. Renamed party alliances are counted as the same parties.



Source: PF Global analysis of devolved elections.

Lessons for Wales

In Scotland and Galicia, nationalist challengers overtook established parties by owning issues that mattered, starting with nationalism, expanding to the economy, and keeping the two bundled together as one relevant offer. Catalonia shows the other side: where nationalists promised more than they could deliver, the Socialists recovered by offering a conciliatory but distinct position on the national question.

For Welsh Labour, recovery in the Senedd is more likely if the party reasserts its ownership of the NHS and the economy, keeps them at the centre of politics, and defines 'standing up for Wales' in those terms. That does not mean avoiding Welsh identity, but having a convincing answer on it that does not simply echo Plaid. Debate about Wales's constitutional future has long been shaped by a succession of proposed settlements, none of which has won mass support, even as Welsh identity and devolution in principle have. That is a challenge Plaid will face in government, and one Welsh Labour can capitalise on.

In focus

Did ‘single issues’ impact the election?

Some senior Welsh Labour figures named the 20mph default speed limit, introduced in Welsh Labour’s last term, as a single issue that cost the party disproportionately, and members said it came up often on the doorstep. In our focus groups, Reform voters cited it more than any other example of Welsh Labour putting ideology before common sense.

However, when asked what contributed to Welsh Labour losing support, Labour switchers put the NHS, the economy and the cost of living at the top of the issues (Figure 3.10), particularly the majority who went to Plaid. Those who went to Reform also cite a wider range, from 20mph to immigration and schools, reflecting a broader break with Welsh Labour’s approach among a smaller group of voters. Our focus groups bore this out, with those who left for Plaid far more open to returning than those who left for Reform.

We note that Plaid switchers do cite tactical voting much more often than Reform switchers (60% compared to 29%) as a key factor behind Welsh Labour’s loss, consistent with many voting Plaid to stop Reform.

Other issues, such as Gaza in parts of South East Wales, moved some voters at the margin, and Plaid voters talked about schools and social care at length in our focus groups. None of these alone explains a 25-point fall: voters raised them as examples of a wider view that Welsh Labour had stopped listening and delivering.

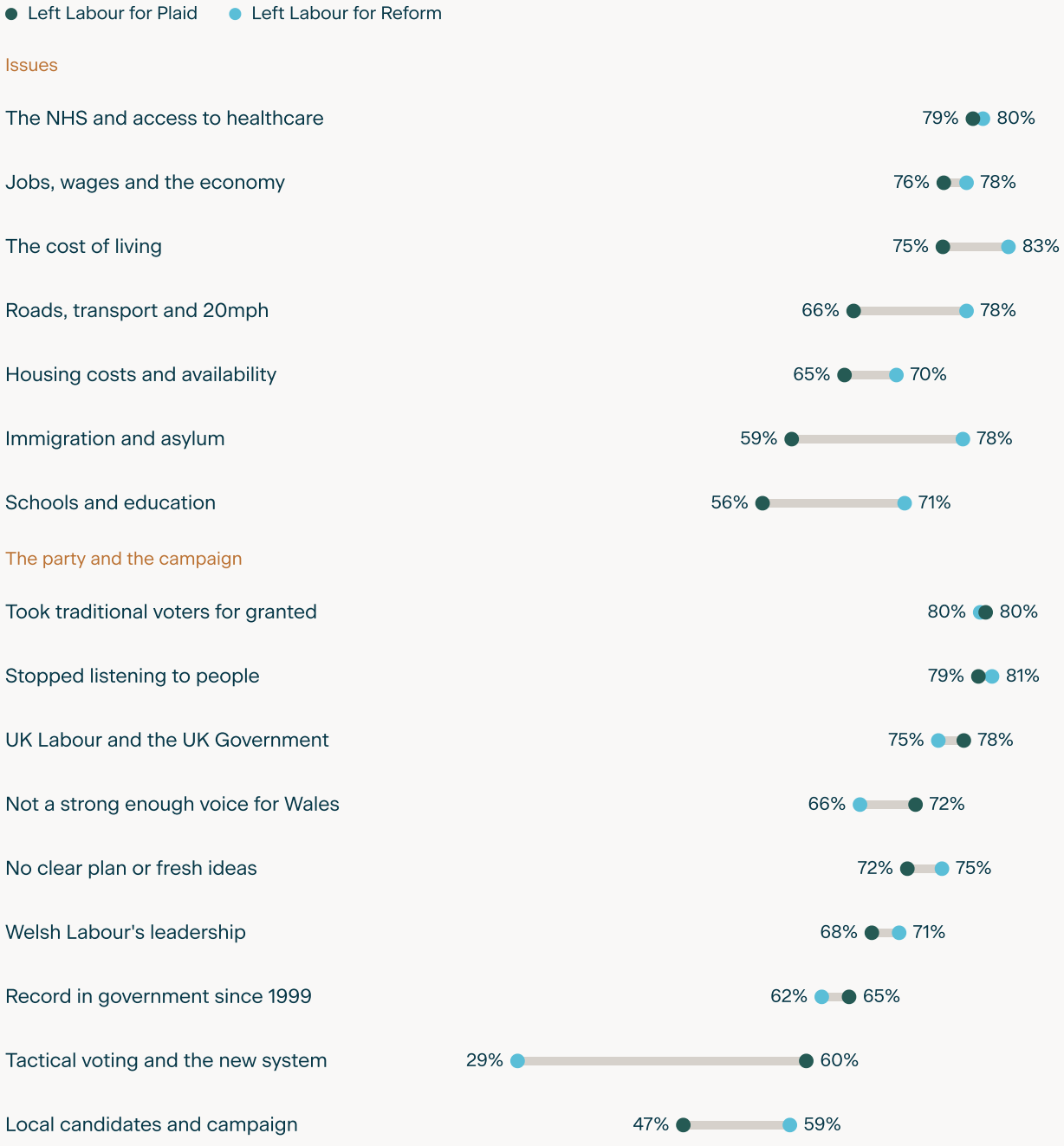
> “Wales has been a bit of an experiment for quite a while now. They try a lot of things out on us first... It just gets worse and worse... the driving thing, obviously, the 20mph zones.
>
> Focus group participant, Labour to Reform, male, 50s, Valleys

> “I live in a very rural place. Trying to get a doctor’s appointment is next to impossible. Same with dentists.
>
> Focus group participant, Labour to Plaid, male, 20s, Pembrokeshire

Figure 3.10

Labour-to-Plaid switchers cited the NHS as the most important issue

Share saying each factor contributed a great deal or a fair amount to Welsh Labour losing support, 2021/2024 Labour voters by May 2026 vote.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026. Base: 2021/2024 Labour voters who voted Plaid or Reform in May.

04

The final year: Caerphilly and the campaign

After Caerphilly, many progressive voters saw Plaid as the way to stop Reform.

Plaid won the Caerphilly by-election on 23 October 2025, taking a seat Welsh Labour had held since 1999. As a result, voters perceived the Senedd election as a competition between Reform and Plaid. Several of the members and key campaign players we interviewed said that they expected Labour to finish third from that point.

Welsh Labour's usual squeeze message, asking supporters of smaller parties to back it to keep a rival out, worked against it this time.

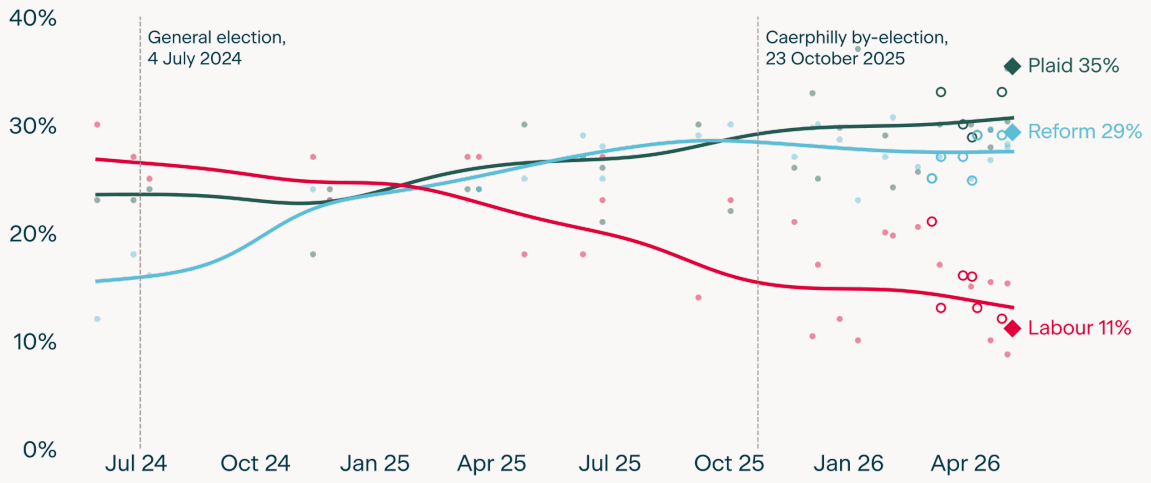
Plaid turned the squeeze back on Welsh Labour. Post-Caerphilly, this caused a split in the party on how to approach campaigning. Some of its materials encouraged tactical voting, where others claimed 'this election isn't about tactics' (Figure 4.1).

> "The Caerphilly by-election changed everything really... everybody, including Labour Party members, thought that... they needed to vote Plaid to stop Reform... we usually had a very good squeeze message, but it was used against us this time.
>
> **Welsh Labour candidate**

Figure 4.1

Welsh Labour's Senedd poll share halved in the two years before the election

Senedd voting intention, May 2024 to polling day, with the July 2024 general election and the Caerphilly by-election marked. Lines are sample-weighted trends of standard polls; hollow markers are MRP estimates; diamonds are the result.



Source: published polls compiled by PF Global (YouGov, Beaufort Research, More in Common, Find Out Now, Ipsos, JL Partners, Survation, Welsh Election Study); Senedd Research.

And for many who switched, the vote was against Reform more than for Plaid

78% of Labour-to-Plaid switchers say they would definitely never vote Reform, and half (51%) gave it as a reason for choosing Plaid.

Those who switched were slightly more likely to cite stopping another party (23%) than shared values (17%) as a reason. Over half (56%) of those who went to Plaid say they will vote for a second choice to stop a party they dislike more.

This fits a wider pattern of anti-Reform tactical voting at recent by-elections.

> "I voted strategically [for Plaid] to keep out Reform.
>
> Labour to Plaid voter, female, 70, South East Wales

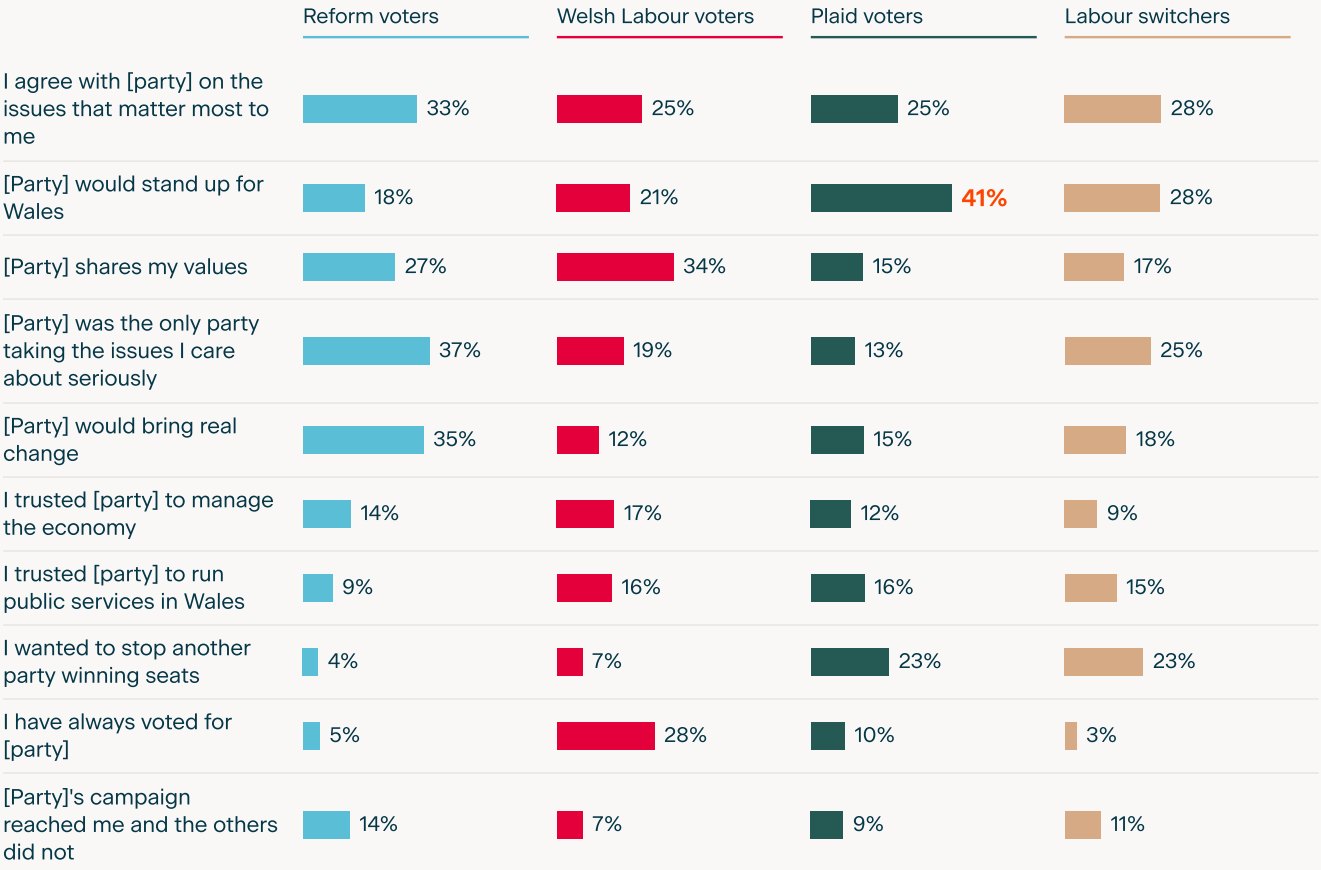
78%

of Labour-to-Plaid switchers say they would definitely never vote Reform

Figure 4.2

Plaid voters wanted someone to stand up for Wales; Reform voters wanted change

What made people vote for their party in May 2026 (up to three reasons), by vote.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Welsh Labour still leads Reform in a head to head, but trails Plaid

Accordingly, many voters would return to Welsh Labour if it was the way to keep Reform out of power. Welsh Labour leads Reform 41% to 34% in a two-party choice for all Welsh adults, and 70% of Plaid's 2026 voters would pick Welsh Labour over Reform.

41%

would choose Welsh Labour in a straight choice against Reform

34%

would choose Reform

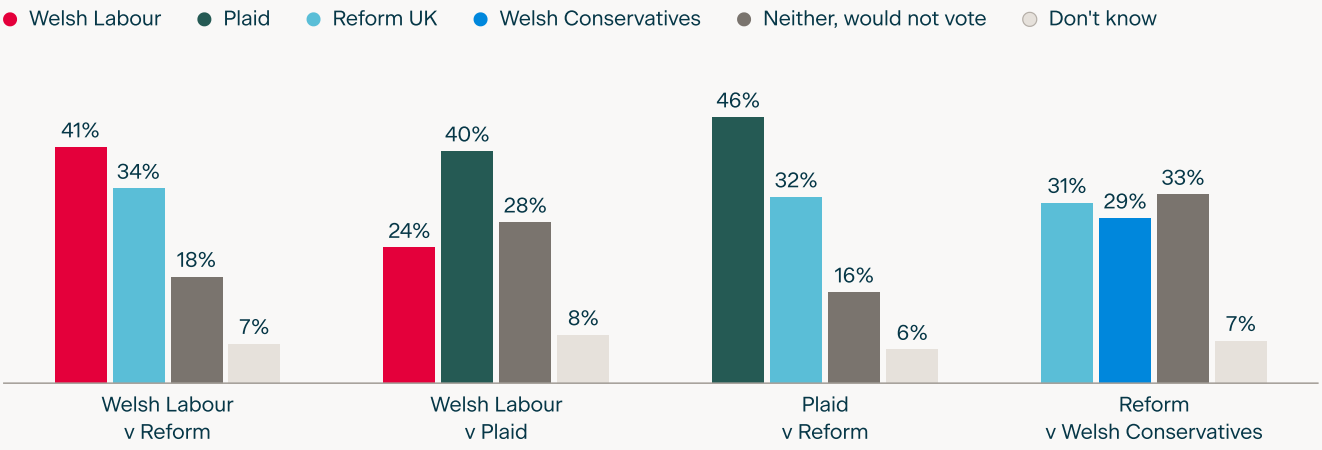
For many progressive voters, the choice between Welsh Labour and Plaid at this election was about two questions, both of which Welsh Labour struggled to answer on the doorstep: why services had got worse after 27 years of Welsh Labour government, and how a vote for a third-placed party would stop Reform.

Plaid won both of these arguments in 2026, but will have to keep actively winning them to hold onto these voters. On delivery, the party was able to adopt Welsh Labour's usual policy messaging on defending Wales' left-of-centre economic interests (in our poll, 37% say Plaid best stands up for Wales, compared to 9% for Welsh Labour), but will face voters next time with a record in government to defend. On stopping Reform, the party was well-positioned after Caerphilly, but our polling demonstrates how this role could still transfer to Welsh Labour (Figure 4.3).

Figure 4.3

Welsh Labour beats Reform head to head, but loses to Plaid

Choice if the contest in each area came down to the two parties shown, all adults.

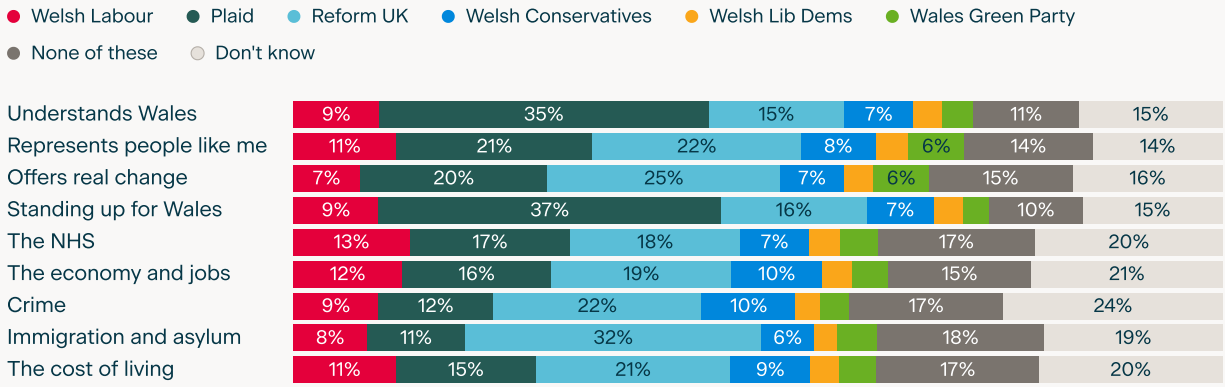


Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Figure 4.4

Welsh Labour is not seen as the best party on any issue

Which party is best on each of the following, all adults.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

In focus

Did the new voting system cost Welsh Labour the election?

In 2026 the Senedd moved from 40 constituency and 20 list seats to 16 large constituencies, each electing six Members from closed party lists, with seats shared in proportion to votes.

It made Welsh Labour's position somewhat harder. From third place Welsh Labour could not argue that only it could beat the main challenger, and the party itself was partly blamed for the change. 35% of voters say they did not understand the system, and only 16% correctly recalled how many Members their constituency elected.

Campaigners and local representatives cited confusion in newly merged constituencies, where voters did not always understand who their Welsh Labour candidate was, or how their vote translated into electing them.

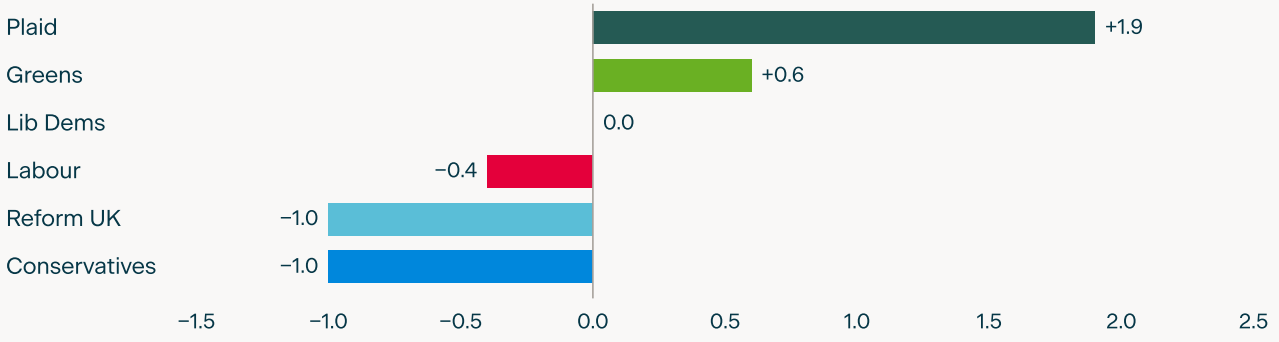
However, the direct effect on the result was small. Only 7% of non-voters cited not understanding the new system as a reason, and two-thirds (66%) of voters said it made no difference to whether they voted. Our modelling suggests the old system would not have significantly changed the outcome: our central estimate is that no party's modelled seat share moves by more than 1.9 points compared with the new system. An extra 1.9 points of Welsh Labour's vote (about 24,000 votes), placed where it would do most good, could have won it up to 9 more seats; spread evenly across Wales, it would have won 2.

In this most optimistic scenario, up to four of the nine seats would have come from Plaid, and up to three from Reform. Plaid would still have been the largest party, and while forming a minority government may have been more difficult, it would not have been impossible (Figures 4.5 and 4.6).

Figure 4.5

Under the old system, our central estimate moves no party's modelled seat share by more than 1.9 points

Modelled seat share under the old system minus modelled seat share under the new system, percentage points (central estimate).

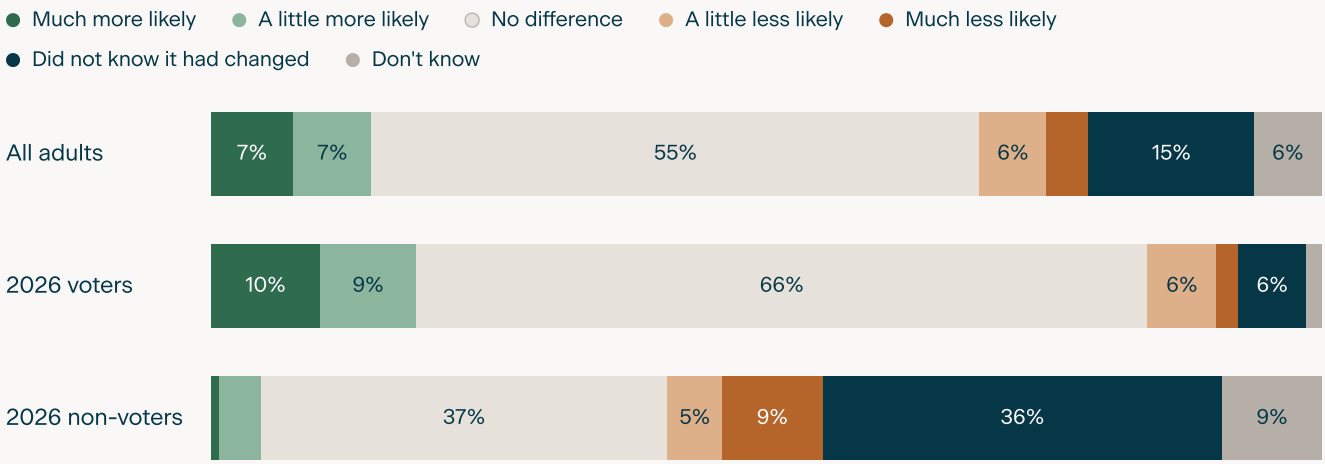


Source: PF Global modelling.

Figure 4.6

Most say the new system made no difference; 36% of non-voters did not know it had changed

Did the change in the voting system make you more or less likely to vote in May 2026? Non-voters are those who said they did not vote.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

The campaign could not close the gap

Welsh Labour ran a familiar campaign, targeting the same areas with similar strategies and healthy funding. What changed was the political climate: the UK Government's unpopularity, Caerphilly, and months of waning support in the polls all contributed to a campaign that many interviewees and members felt was largely decided before it started.

The campaign reached fewer voters than any recent election outside the pandemic. In the final 42 days, including polling day, Welsh Labour made 44.1 contacts per 1,000 residents aged 16 and over, compared to 59.7 at the 2024 general election and 53.9 at the 2022 local elections. Contacts fell as poll ratings and volunteer numbers fell. It is difficult to separate out decline linked to political demoralisation from changes in active membership and organisational weaknesses. Still, through discussions with people involved in the campaign, poor electoral prospects clearly played an important role in its ability to mobilise volunteers from the outset (Figure 4.7).

In their words: Support on the ground

> We had a relatively healthy campaign budget, but we received very little in terms of external support.
>
> Senior Welsh Labour campaign official

> I can think back to general elections in recent history where on polling day we'd have 250 people out knocking doors in just my constituency... I think we had 30.
>
> Welsh Labour MP

> Even on polling day there were 6 volunteers working.
>
> Welsh Labour member

Figure 4.7

Welsh Labour made 44 contacts per 1,000 residents, down from 60 in 2024

Welsh Labour contacts per 1,000 residents aged 16 and over in the final 42 days of each campaign, including polling day. The 2021 campaign (lighter bar) ran under pandemic restrictions.



Source: Welsh Labour canvassing data.

Welsh Labour reached voters, but its contact had mixed effects

Almost half (47%) of Welsh adults recall being contacted by a party during the campaign, with around a quarter reporting contact from Welsh Labour, Plaid, and Reform respectively. For Welsh Labour, this contact came mainly in the form of leaflets, door knocks and letters; only 7% recall its social media posts and 5% paid adverts.

Voters rarely credit a leaflet or a door knock with changing their mind, so these figures likely understate the impact of contact. However, where 69% of those Welsh Labour contacted say it made no difference to how they voted, 26% of those Plaid contacted said it made them more likely to vote Plaid. Contact from Reform both put off and persuaded people at about the same rate.

Overall, this is unsurprising: contact during a ground campaign can have a greater impact – positive or negative – for third parties, which generally have to work harder to build and maintain voter awareness (Figures 4.8 and 4.9).

Figure 4.8

More than a third of adults recall no contact from any party

Share contacted by each party during the campaign, by group. More than one party could be chosen.

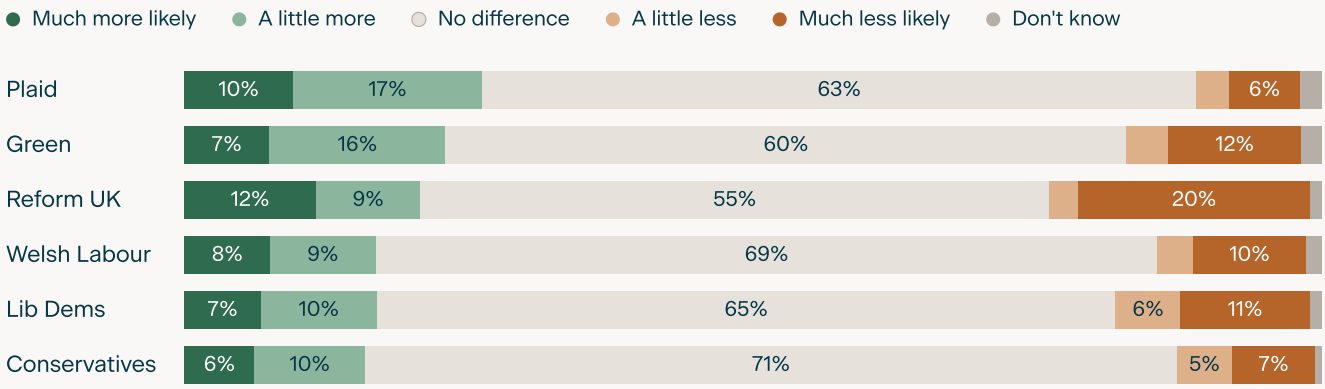
	Welsh Labour	Plaid	Reform	Con	Lib Dem	Green	No party	Don't know
All Welsh adults	26%	25%	28%	18%	12%	12%	36%	17%
Welsh Labour 2026 voters	43%	27%	24%	15%	14%	16%	31%	9%
Labour switchers	38%	34%	39%	24%	16%	19%	30%	11%
Plaid 2026 voters	40%	48%	38%	26%	18%	20%	26%	13%
Reform 2026 voters	24%	19%	43%	17%	9%	10%	38%	9%
2021 non-voters	18%	15%	19%	13%	6%	7%	49%	24%

Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Figure 4.9

More of those Plaid contacted said it made them likelier to vote Plaid; Reform's contact cut both ways

Did being contacted by each party make you more or less likely to vote for it? Those contacted by each party.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026. Base: those contacted by each party.

Selection finished later than planned, and some campaign materials ran ahead of the manifesto

Selection. At points during the campaign, decisions on political strategy and party rules did not translate into a process that worked on the ground. The timing of candidate selection and ranking shows this. The Welsh Executive Committee (WEC) decided that sitting members would take the top list places, with the agreement of the Senedd Labour Group and the trade unions, through the Trade Union and Labour Party Liaison Organisation (TULO). Other candidates were selected through local processes mainly led by volunteers over the summer.

The final ranking of candidates happened one to two months after the party's own internal targets, with the list for Gwynedd Maldwyn published in December 2025. While Plaid only finalised its lists a few weeks earlier, it began the process as early as May, allowing candidates to develop a local profile. Some felt Welsh Labour did this too late and thus disadvantaged non-incumbents, while candidates low on the lists felt they had little incentive to campaign.

Table 4.1

Welsh Labour's candidate selection stages for the 2026 Senedd election

Stage	Timing
Incumbent reselection and ranking	June 2025
Selection of new candidates	50 confirmed by August 2025; the rest shortlisted in August and September 2025
Target for completed lists	October 2025
Ranking and WEC endorsement	November and December 2025

Source: Welsh Labour.

This speaks to the feedback we received from Welsh Labour members, who often cited too few volunteers, unknown candidates, and late or generic literature.

The selection timetable and incumbent protection were set by party bodies. Ranking then finished one to two months behind target, with pressure on both staff and volunteer capacity.

Manifesto. The manifesto was published on 30 March 2026, to the timetable agreed by the Campaign Committee and before the Greens, Plaid, and the Liberal Democrats, and after the Conservatives (3 March) and Reform (5 March). The manifesto was signed off after some print deadlines, restricting the contents of early campaign materials (Figure 4.10).

In their words: Late selection and preparation

> "The manifesto and the pledges weren't approved until way after most of the big print deadlines.
>
> Welsh Labour campaign organiser

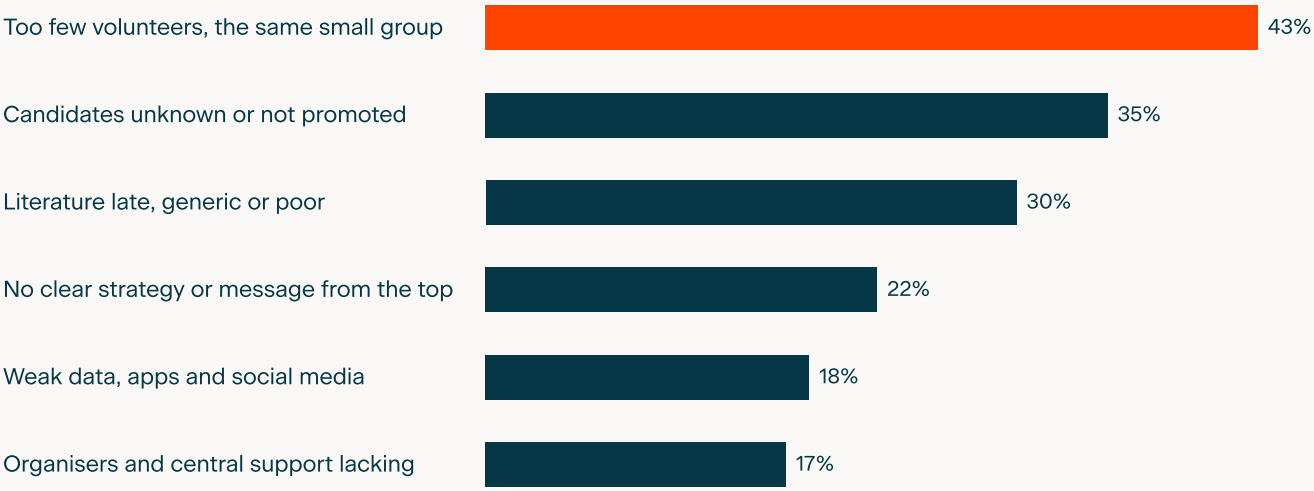
> Candidate selection being completed by September 2025... would have also improved our chances.
>
> Welsh Labour list candidate

> People within the party, and candidates, expressed the view that the very late selection of candidates had hampered the campaign.
>
> Welsh Labour member

Figure 4.10

Too few volunteers was members' most common complaint about the campaign

Share of member submissions raising each problem with the campaign.



Source: Welsh Labour movement engagement submissions, 2026. Base: Welsh Labour members who made a submission.

Centrally directed, Welsh Labour's digitals cut through less

Voters rated Plaid (18%) and Reform (16%) as the most effective communicators, ahead of Welsh Labour (8%). Almost half did not name a single party as such. Interviewees described Welsh Labour's digital output as slow and cautious. They pointed to Reform's high-volume content and Plaid's organic digital performance during the campaign where Welsh Labour's fell.

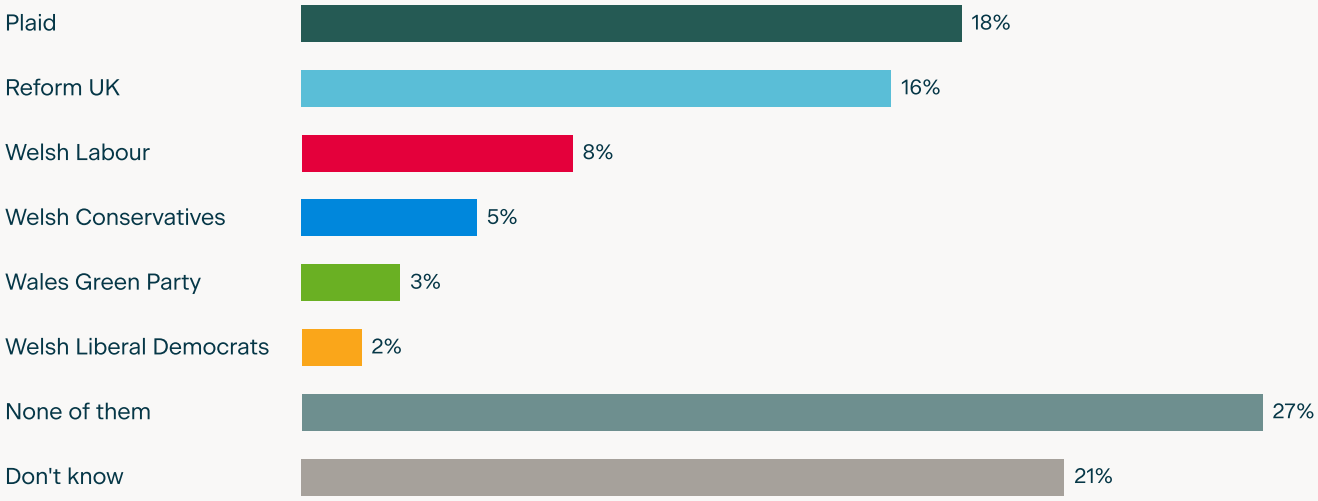
Decisions on digital content were taken at a senior political level, often directing daily meetings on the tone, messaging, and format of output.

This top-down approach was partly structural. A November 2025 proposal set out a temporary campaign office including a Head of Digital, but only a Campaign Director was appointed (Figure 4.11).

Figure 4.11

Plaid was seen as the most effective communicator; 8% named Welsh Labour

Which party communicated most effectively during the campaign, all adults.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

In their words: The digital campaign

Members and staff described a digital campaign that was slow and outpaced by Plaid and Reform, at a time when many voters get their news online.

> In my view, our online campaign felt outdated compared with Plaid and Reform. Both were quicker, sharper and much better at producing short content that attracted younger voters, particularly on TikTok, Instagram and Facebook.
>
> Welsh Labour list candidate

> The tiktoks by the FM were not engaging and were like mini PPBs that most people on tiktok would scroll past.
>
> Welsh Labour staff member

> Our targeted advertising was weak and not frequent enough and our content and design, particularly compared to Plaid Cymru, made us look old and out of date.
>
> Welsh Labour list candidate

> The tone of digital campaigning was inappropriate and at times embarrassing. We did not come across as a party of government.
>
> Welsh Labour member

> I think the online stuff during the Caerphilly by-election set the tone a bit which meant it was difficult to get away from a press caricature of us as bad at social.
>
> Welsh Labour member

> I think social media is becoming more of a news outlet tool than watching the news on television. Almost because you can select areas of interest.
>
> Focus group participant, Labour to Plaid, female, 30s, Wrexham

What held the digital campaign back?

To an extent, the new voting system shaped the campaign; with uncertainty about voter knowledge of the new ballot process, Welsh Labour built its national campaign around the First Minister and asked people to vote for the Welsh Labour brand rather than highlighting specific candidates in constituencies. Digital output tried to adjust to this new reality: a member of the digital team was hired to follow Eluned Morgan and produce short-form video to make her a household name.

Many agreed that building the campaign around the First Minister was a reasonable choice, and a model through which the party has won before. However, Morgan took over in August 2024, after a turbulent spell for the party and a poll lead that was already narrowing. This left less than two years to build a profile.

Other parties adopted a more balanced approach; building a strong national brand in their air campaign but including headline candidates on materials as well.

Welsh Labour's output reached relatively few voters. Of those the party contacted, 7% recalled its social media posts and 5% its paid adverts, compared to 11% and 9% for Plaid. After the election 12% of adults did not know who Eluned Morgan was, and more viewed her negatively (37%) than positively (14%). Interviewees placed the weakness in relying on a single messenger, not in the messenger herself. In written submissions, some members made the same point, describing the campaign as 'presidential' or saying local candidates went unseen.

> Nobody understood it, including a lot of our elected representatives... we made the only logical choice, which is, you know, the air war is going to be entirely Eluned-focused, presidential. Don't ask people to make... clever choices about the ballot paper with six things on it.
>
> Senior Welsh Labour adviser

> We had to run it sort of like a presidential campaign... short-form video content of Eluned to try and take advantage of things like Reels and TikTok and try and make her a household name. And I would say that that didn't quite go to plan.
>
> Welsh Labour campaign staff member

> It was all about Eluned. But we did a lot of videos just of her talking down the barrel.
>
> Senior Welsh Labour staff member

> Locally we should have had Eluned with the top 2 local candidates or the top 3 local candidates... Eluned and nobody else is... just rubbish, frankly.
>
> Senior Welsh Labour campaigner

> Let's not rely too much on one single message carrier. Let's have a few good message carriers.
>
> Welsh Labour field organiser

05

The path back to power: what Welsh Labour should do next

Welsh Labour is at a critical juncture, but voters are still open to hearing what it has to say. Nearly three-quarters (74%) of those who stopped voting for the party in May do not rule out returning. This review makes five recommendations.

01 **Define a clear relationship with UK Labour.**

This includes joint action where objectives align, as well as the ability to make a distinct Welsh case where priorities differ.

02 **Rebuild the base with an understanding of who left, and why.**

Understand and seek to rebuild a rapport with progressive voters who have left the party over shared values.

03 **Be Welsh on Labour's terms.**

Prioritise what voters in Wales value most: the NHS, the economy, and cost of living. Arguments for more devolved powers should be made when there is a clear case that they would improve those everyday priorities.

04 **Define the leader and the offer early.**

Introduce new message carriers and a policy agenda before opponents can define them.

05 **Strengthen the campaign machine for a new electoral era.**

Closed lists make candidates harder to know, so select them earlier and promote them alongside the leader, with clear ownership of digital and more capacity where list seats are now winnable.

Welsh Labour has over a generation of experience with winning elections in Wales. Doing so again means reconnecting with the party's existing understanding of what voters care about most, and holding to a clear political strategy built on this understanding as well as a long-term track record of competence.

01 Define a clear relationship with UK Labour

In 2026, Welsh Labour went to the doorstep defending an unpopular Westminster record for the first time in 16 years, on top of local issues. Every devolved and local election is shaped by national trends, but a clear relationship with the UK party is essential if Welsh Labour is to give voters a coherent message at the next Senedd election, when one or both parties will be in opposition.

This means being explicit on two things:

- **Policy:** where and how Welsh Labour holds to Welsh priorities. At this election, members and campaigners felt that the 'Red Welsh Way' was intangible and lacked a clear policy offer that connected with voters.
- **Positioning:** who Welsh Labour stands for, and how that sits with Westminster. When another party governs in London, being adversarial is easy. When UK Labour governs there, Welsh Labour can build on common ground while casing differentiation in policy terms: Andy Burnham's prioritisation of further devolution and local decision-making may lend itself well to this.

The result should be a durable relationship with UK Labour which incorporates at the least: joint action where objectives align, meaningful influence for Welsh Labour over decisions affecting Wales, and the ability to make a distinct Welsh case where priorities differ. The relationship must remain credible whether Labour governs in Cardiff, Westminster, both or neither.

02 Rebuild the base with an understanding of who left, and why

Welsh Labour's base is fractured. Rebuilding a winning coalition means understanding where former supporters went, why others did not vote, and what concerns each group cares about. The party must then demonstrate its competence on those issues.

The voters Welsh Labour is best placed to recoup are those that left for Plaid: left of centre, opposed to Reform and often still Labour at Westminster. Reconnecting with them means scrutinising Plaid's record in government, particularly on the NHS and the cost of living, where Plaid's lead over Welsh Labour is much narrower than on understanding or standing up for Wales. These are also the top concerns of Plaid's own voters: 61% name the NHS and 49% the cost of living (Figure 5.1).

61%

of Plaid's 2026 voters name the NHS as a top issue

49%

name the cost of living

However, it also means being pragmatic about common ground and clear about where Welsh Labour is distinct. Welsh Labour should define itself by its own policy and principles, not in opposition to Plaid: as this review shows, voters move between the two on competence and on who can keep Reform out.

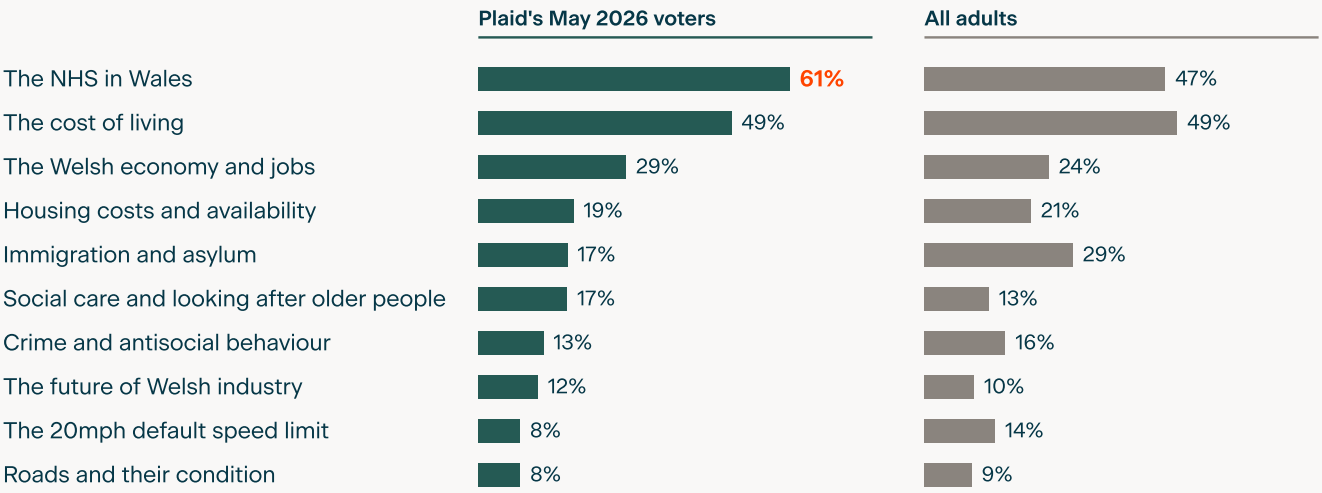
Those who switched to Reform are further from Labour's traditional offer, but not entirely lost. 38% of Labour-to-Reform switchers and a third of May's non-voters remain open to Welsh Labour. Both still care about the NHS and the cost of living, though switchers to Reform also want a tougher line on immigration.

The 2027 council elections will be an important test, with Welsh Labour's main opponent varying by ward. Targeting should follow local and national evidence: Welsh Labour is more exposed to Plaid in these elections overall, but swing voters there are more open to returning. In Reform-facing seats, the party should be the clear, unifying alternative to Reform on policy and delivery.

Figure 5.1

The NHS is the top issue for Plaid's voters, ahead of the cost of living

Which of the following are the most important issues facing Wales at the moment? Up to three.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

03 Be Welsh on Labour's terms

Welsh Labour should define standing up for Wales by what it delivers on the issues voters care about most: the NHS, the cost of living and the economy. This is ground the party has historically owned, and it is where voters, including those who have moved to other parties, judge whether a party is on Wales's side. Adopting rivals' definitions of Welshness is more likely to strengthen their hand than to win voters back.

This does not mean stepping back from institutional or constitutional questions. For example, only 8% of Labour-to-Plaid switchers name devolution or independence as a top issue, but they are open to change: almost half want a stronger Senedd, and, asked to choose, 73% of adults prefer more power for regions, councils and local areas over more power for the Senedd.

73%

of adults, asked to choose, prefer more power for regions, councils and local areas over more power for the Senedd

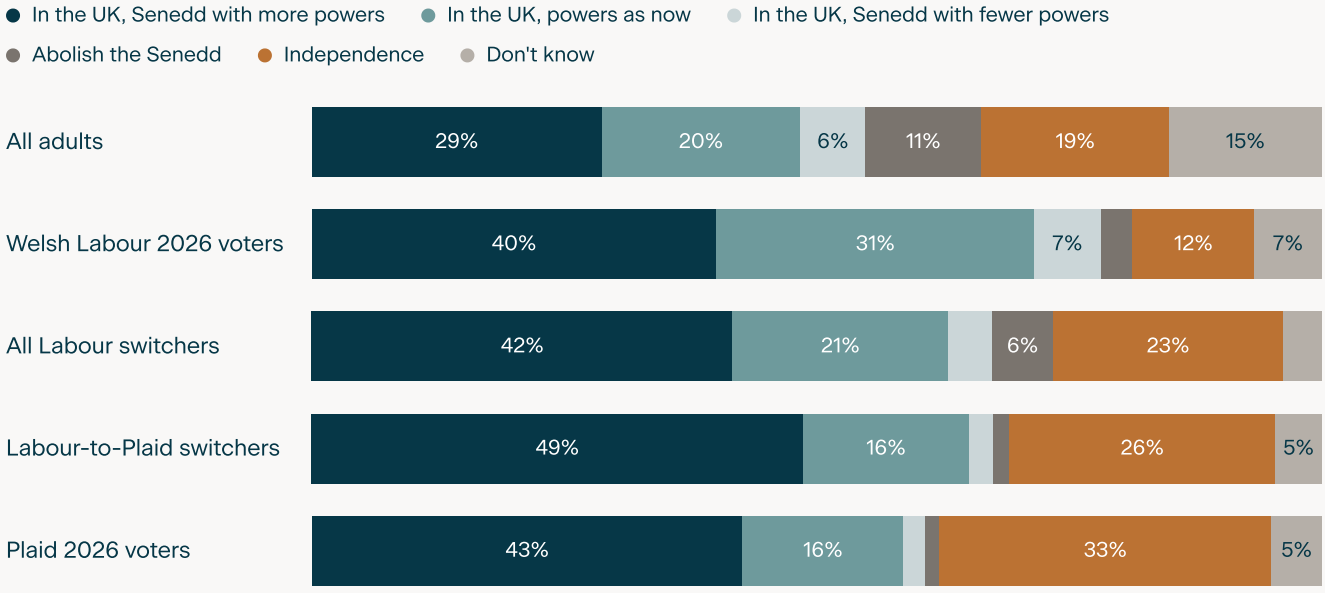
Welsh Labour should seek further powers, for the Senedd and within Wales, where they would improve delivery or bring decisions closer to people. That sets the party apart from both Plaid's constitutional project and Reform's scepticism of the Senedd (Figure 5.2).

- Make 'standing up for Wales' a test of what voters get on the NHS, the cost of living and the economy.
- Seek further powers for the Senedd where they would improve delivery, and say what each would deliver rather than debating powers in the abstract.
- Value Wales' cultural identity, and show it through public services and delivery rather than constitutional tests.

Figure 5.2

Labour's lost voters want a stronger Senedd within the UK, not independence

Which of the following comes closest to your view about how Wales should be governed?



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

04 Define the leader and the offer early

Welsh Labour will fight the 2030 election from opposition, with a leader most voters do not yet know.

Over half (57%) of Welsh adults have not heard enough about Ken Skates to judge him, rising to 70% of Labour voters who went to Plaid. Andy Burnham is popular with these same voters Welsh Labour lost in 2026, but the SNP already call him a prime minister for England, and Plaid may follow.

57%

of Welsh adults have not heard enough about Ken Skates to judge him

This is an opportunity to introduce the new Welsh Labour leader alongside a clear account of the party's purpose and priorities. The process should start now, with an offer simple enough to explain on the doorstep, demonstrating a positive vision for Wales.

Start early, before opponents define Skates, and centre this offer on the key priorities corroborated by this research: shorter NHS waits, support with the cost of living, and a clear plan for the economy. Voters want to know what a Welsh Labour government would do differently, not what it did before.

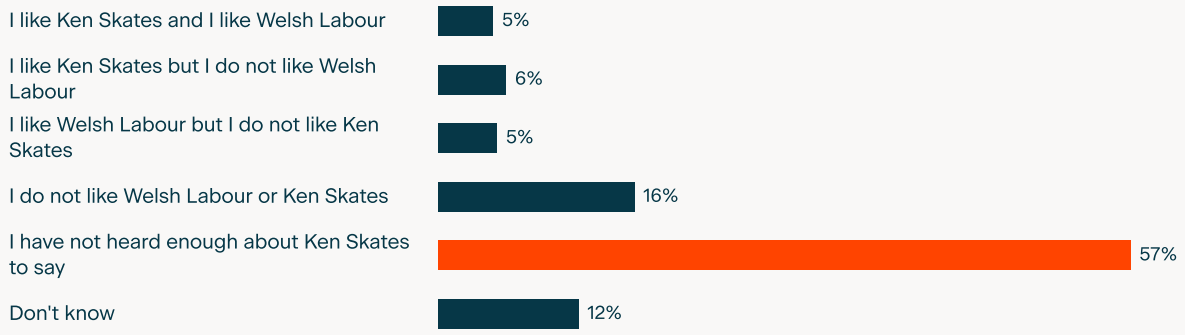
> **Words are not enough and they need to show action particularly at the grass roots and demonstrate changes can be made and show a positive outcome.**
>
> Former Labour voter, male, 57, South West Wales

Focus on developing Welsh Labour's own capacity to communicate consistently through a wider pool of credible messengers, drawing on the contribution of UK Labour figures where useful (Figure 5.3).

Figure 5.3

Most adults have not heard enough about Ken Skates to judge him

Ken Skates became leader of Welsh Labour in July 2026. Which of the following comes closest to your view?



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

05 Strengthen the campaign machine for a new electoral era

Welsh Labour ran a broadly similar campaign to recent elections, but the system had changed around the party. While our modelling finds that it made little difference to the 2026 result, a new electoral system does change how campaigns will work. In large multi-member constituencies with closed lists, voters may be inclined to choose a party rather than a person, and candidates who are not already well known may find it harder to get cut-through: seven of Welsh Labour's nine winners in 2026 were sitting MSs. Local issues need handling differently too, with campaigns that speak to more communities at once and constituency parties that work together across a much larger area.

Cohort replacement also means that Welsh Labour's established voter base in the Valleys will shrink as a proportion of the electorate compared to younger Senedd voters who get their news online and need to be reached using new tactics – as Plaid and Reform achieved through more reactive, short-form content. Many already vote Labour at general elections, and share Welsh Labour's overarching values (Figure 5.4).

- Complete candidate selection by the autumn before the election, so candidates have time to build a profile, and promote them alongside the leader. If Parliament is not dissolved early, the general election will fall less than a year before the Senedd election. Welsh Labour should plan for a long stretch of on-and-off campaigning, pace its resources, capacity and morale accordingly, and be ready to adjust its Senedd strategy quickly in light of the general election result.

- The new system means Welsh Labour can win list seats in regions where it has historically struggled, such as the North West. Doing so will need a tailored strategy and a sustained programme of member engagement, volunteer development and support for local campaigning, based on a fuller assessment of where capacity is weakest. It will also need an offer for a region more concerned than the rest of Wales about the availability of local jobs (37% compared to 25%), second homes (9% compared to 3%), and more likely to say too many decisions are taken in Cardiff Bay (28% compared to 18%).

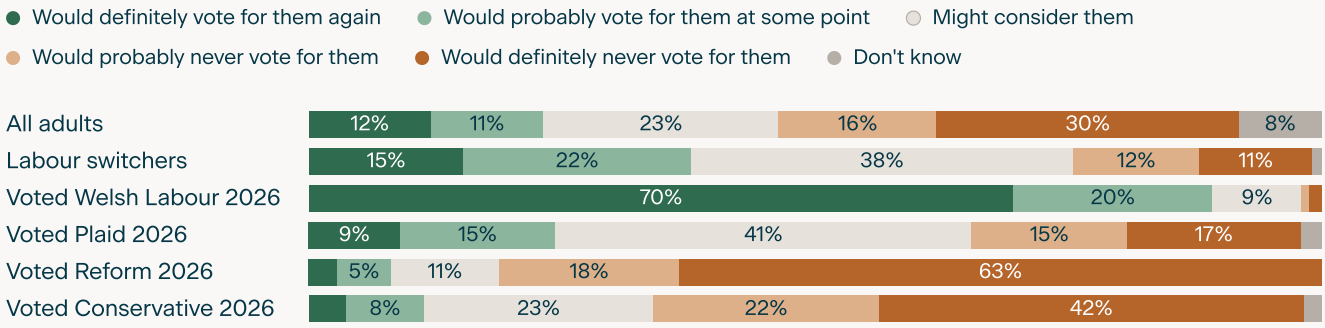
- Campaign decisions were made at different levels. Delivering an achievable campaign plan and implementing it on the ground depends on decisions about political strategy and party rules made upstream. Where these decisions were difficult or overly ambitious, like the selection timetable, Welsh Labour should identify which link in the chain failed and address it.

- Set clear governance for digital campaigning, and keep to it. Agree the campaign structure early and staff it in full, including a dedicated digital lead. Once the political strategy is agreed and authority delegated, digital output should have one clear owner and timely route for approval. The release of key communications materials, like the manifesto, should be made with print and digital deadlines in mind.

Figure 5.4

More than a third of Labour switchers would vote Welsh Labour again

Longer-term view of Welsh Labour, by May 2026 vote.



Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026.

Overall, acting decisively and quickly is key

Welsh Labour has recovered from setbacks before, and many voters are still open to hearing what the party has to say: nearly three-quarters (74%) of those who stopped voting for the party in May do not rule out returning.

The voters Welsh Labour most needs are also among the most open to return. 65% of Plaid's 2026 voters would vote Welsh Labour or consider it, compared to 19% of Reform's. Of Labour-to-Plaid switchers, only 14% say they have left for good.

65%

of Plaid's 2026 voters would vote Welsh Labour or consider it

19%

of Reform's 2026 voters would do the same

This degree of openness among recently departed voters is normal: ten months after the 2024 general election, 82% of 2019 Conservatives who had voted for another party still gave some chance of voting Conservative again, and fewer than one in five ruled it out.

However, openness fades if it is not acted on quickly: 2019 Conservatives who left grew steadily less likely to consider returning between 2023 and 2025, and in Scotland, many Labour voters who switched to the SNP in 2015 only came back once the SNP itself faltered. Research finds that voting for a party also builds attachment to it, so the longer switchers stay with parties like Plaid, the harder they become to win back.

In acting quickly, the party's strategy should be a steady purpose rather than a rigid plan: clear goals, clear decision-makers with the authority to act, regular checks against the evidence, and a way for staff and campaigners to raise concerns.

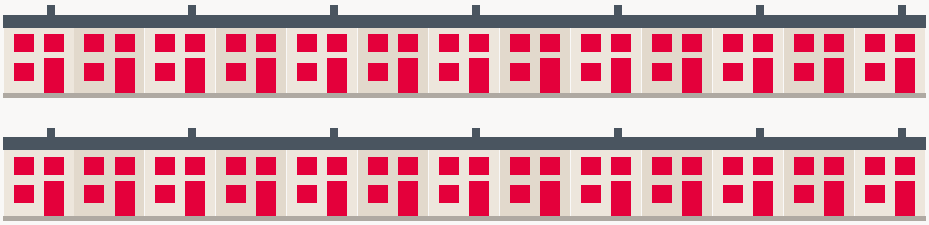
Three in four of Labour's voters left in May, but most have left the door open

Each house is 1% of Labour's 2021 or 2024 voters in Wales. The windows show how they voted in May; the door shows whether they stayed, or would come back.

100 people who voted Labour in 2021 or 2024

Windows: May vote — Welsh Labour · Plaid · Reform · Other or didn't vote

Doors: would they come back? — open: yes, or would consider it · shut: ruled it out, or not sure



26 Welsh Labour



34 Plaid
29 open · 5 shut



11 Reform
4 open · 7 shut



29 Other or didn't vote
22 open · 7 shut

26 stayed · 55 left with the door open · 19 shut it

Source: PF Global poll of Wales, 1,387 adults, Aug to Sep 2026. Rounded to whole houses; within each party group, open doors come first.

About the research

01 **A poll of 1,387 adults.**	A new poll of adults aged 16 and over in Wales, conducted online between 29 August and 9 September 2026 and weighted by interlocking age and gender, region and education to nationally representative proportions. Vote intention figures exclude ‘don’t know’s, those who would not vote and refusals.
02 **20 interviews.**	Interviews with candidates, elected representatives, staff, advisers and organisers involved in the 2026 campaign, conducted on a non-attributable basis.
03 **161 member submissions.**	Written submissions from Welsh Labour members, 63 of them from people who held a campaign or party post. Open text responses were coded against a written codebook and checked against an independent keyword coding.
04 **Two focus groups.**	Focus groups of eight voters: one with people who moved from Labour to Plaid, one with people who moved from Labour to Reform UK, aged 25 to 65.
05 **Canvassing records.**	Analysis of Welsh Labour’s canvassing records, July 2011 to July 2026.
06 **Long-run election data.**	Long-run analysis of Welsh and UK elections using the British Election Study, official results and other tracker datasets.

Interviews and member submissions describe the views and experiences of those involved in the campaign, with individuals choosing whether they wanted to participate. We use them to explain and illustrate findings, and draw firm conclusions only where they are supported by the poll, canvassing records, election results or other independent data.

Research and analysis by Damayanti Chatterjee, Tim Rhydderch and Michela Arena, led by Professor Anand Menon.

References

1 Scully, R. and Wyn Jones, R. (2012) 'Still three Wales? Social location and electoral behaviour in contemporary Wales', Electoral Studies 31(4)

2 Clarke, H. D., Sanders, D., Stewart, M. C. and Whiteley, P. (2004) Political Choice in Britain, Oxford University Press

3 Larner, J. and Poole, E. G. (2025) 'General election voting intention: centre-left fragmentation and the Reform UK challenge', Thinking Wales, Cardiff University

4 YouGov, Welsh Political Barometer for ITV Wales and Cardiff University

5 British Election Study internet panel, Welsh respondents

6 PF Global poll of Wales, 1,387 adults, August to September 2026

7 Elazar, D. J. (1987) Exploring Federalism, University of Alabama Press

8 Hooghe, L., Marks, G., Schakel, A. H. et al. (2016) Measuring Regional Authority, Oxford University Press

9 Keating, M. (1998) The New Regionalism in Western Europe, Edward Elgar

10 Tarlton, C. D. (1965) 'Symmetry and asymmetry as elements of federalism', Journal of Politics 27(4)

11 Serra Serra, M., Ubasart-González, G. and Martí i Puig, S. (2020) Analecta Política 10(18)

12 Pallarés, F. (2023) Comunicació 40(2)

13 Franco-Guillén, N. and Serrano Balaguer, I. (2024) Centre on Constitutional Change

14 Rico, G. and Liñeira, R. (2014) South European Society and Politics 19(2)

15 Johns, R., Mitchell, J., Denver, D. and Pattie, C. (2009) Political Studies 57(1)

16 Fieldhouse, E. and Prosser, C. (2018) Electoral Studies 52

17 Hassan, G. and Shaw, E. (2012) The Strange Death of Labour Scotland, Edinburgh University Press

18 Bello, G. G., Máiz, R. and Pérez-Boquete, R. (2025) Nationalities Papers 53(4)

19 González Rodríguez, J. J. and Barreiro-Castro, L. (2025) Revista Galega de Administración Pública 70

PF Global

Advice | Research | Argument

PF Global gives advice built on deep sector expertise, underpinned by global opinion and economic research, so clients can win the arguments that will decide their future. We bring together experts across policy, campaigns, media, data science, research, sustainability and economics.

Locations

United Kingdom · London
Asia Pacific · Singapore, Jakarta
United States · Washington, DC
Mexico · Mexico City

Contact

hello@pf.global
pf.global

© 2026 PF Global. All rights reserved.