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# In or Out? Britain's Future in Europe

*Research carried out by Opinium Research for Lansons Public Affairs and Cambre Associates in association with City of London Corporation.*

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## Foreword

Britain last held a referendum on its membership of the European Union in 1975 and on that occasion 67% of the electorate voted in favour of staying in. Britain's then Prime Minister, Harold Wilson, had made the referendum an election manifesto pledge in 1974 and delivered on his promise a year later. He, along with other party leaders, gave individual MPs and Ministers the opportunity to publicly express their views, while also stating the Government's support for Britain to remain in the EU.

Approaching forty years later controversy still rages over Britain's EU status and the effect of it on the nation's economy and social fabric. The difference between then and now lies in the vastly increased scope of the EU, both in terms of its competences and membership. This and the Eurozone economic crisis have brought Britain's membership into sharper focus, along with questions over the role of the EU Commission, Parliament and attendant institutions. Within this context, the Prime Minister announced his intention to hold a referendum on the UK's EU membership, initiated a comprehensive review of the competences of the EU and kick started a process of cutting EU red tape.

Our politicians are right to be cautious over this touch stone issue, as the ramifications for the UK of withdrawing from a trading block of five hundred million people are huge. However, with the UK's main investors and trading partners becoming increasingly vocal in their concern over the UK's EU future, every day of uncertainty adds to the pressure facing economic, social and political institutions in the UK and across wider Europe, potentially diminishing our ability to engage in long term external trading agreements and the confidence of businesses within the single market to build relations with each other.

In response to the need for a more substantive EU debate Lansons Public Affairs and Cambre Associates resolved to further the cause of public debate over the key issues. Our intention here is to enable leading thinkers on EU policy from across the political spectrum to put their arguments to the test and learn more about what their fellow citizens think. That is why we have commissioned this report and hope that it provides additional insight that will contribute to the debate on Britain's future in Europe.

We hope that you take much from this independent report compiled by Opinium Research.

Andrew Silverman  
Board Director, Head of Public Affairs  
Lansons



Tom Parker  
Managing Director  
Cambre Associates







## Introduction

“We must build a kind of United States of Europe,” said Winston Churchill in 1946, only a year after the end of the Second World War, a conflict which was responsible for unimaginable destruction across the European continent.

His reasoning behind that statement was shared by the ‘Founding Fathers of Europe,’ creators of the European Coal and Steel Community, the international organisation which would develop into the modern day European Union. According to Robert Schuman, pooling together natural resources and creating a common market for coal and steel, would “make war not only unthinkable but materially impossible.”

More than half a century later, the European Union comprises 28 Member States, and has a population of over 500 million citizens. The EU has evolved from more than just a free market area; it now has exclusive or shared competence in areas such as energy, agriculture, competition, transport and justice/home affairs.

This level and deepening of integration has always been viewed with suspicion by certain citizens and indeed governments in Europe, but none more so than the United Kingdom, perhaps ironically given Churchill’s 1946 statement which provided the theoretical basis for the modern EU.

Over the past few decades, this relationship has steadily deteriorated and the British public has grown increasingly Eurosceptic. Britain’s continued membership of the European Union is now far from certain. In January 2013, British Prime Minister David Cameron announced his plans for an in/out referendum and repatriation of certain powers, should the Conservative party win the next election in 2015. The actual possibility of a British exit from the EU has led to a deluge of statements from businesses, politicians, associations and academics on why the UK must remain at the forefront of this internal market of 500 million consumers. At the same time, there have been many who are pushing for the ‘Brexit,’ asserting that Britain need only have a free-trade agreement with the EU, thus benefiting from access to the single market but without the regulatory burdens and commands from Brussels.





How has all of this been received on the continent and by the UK's EU partners? German Foreign Minister Guido Westerwelle said he wants Britain to remain in the EU but that cherry-picking its level of involvement cannot be an option. His French counterpart, Laurent Fabius said "imagine Europe is a football club and you join. Once you're in it you can't say, 'let's play rugby'."

With all of this in mind, this survey has looked at attitudes to Europe among business, the UK general public and consumers in a number of other European countries to gather their views on this fractious relationship.

Specifically, the issues covered include what people in each country think of the EU as a whole, the impact it has on particular issues or areas of policy, what people in Britain think the consequences of withdrawal would be and what people in the other countries think of the UK.

It also looks at which countries people feel the closest connections to and how much, or little, people feel connected with Europe or other European countries.

Among businesses, we asked about what impact the EU has on respondents' own businesses as well as how withdrawal might affect them.

Why we chose each country:

- Germany – Germany, since the advent of the Eurozone crisis, is the most powerful country in the EU. No possible treaty change can take place without German support and David Cameron's hopes of a renegotiation of Britain's place in the EU rest largely on securing some sort of agreement from Chancellor Angela Merkel
- France – The other half of the Franco-German "engine" of EU integration, France also has a number of useful similarities to the UK. Both are former imperial powers with large overseas diasporas and France has also seen a sharp rise in support for the far right under the Front Nationale with concerns about immigration featuring prominently
- Poland – Poland is a recent accession country and brings a new perspective in contrast to the two founding members (France and Germany) and the UK which joined 40 years ago. It is the most pro-British country and, along with the more negative views of France, gives an idea of the range of opinion and sympathy (or lack thereof) available to the UK. It is similar to the UK in being more pro-American than much of Europe (the Iraq war being a recent example) and also outside the Eurozone. It is also primarily a recipient rather than a contributor when it comes to EU subsidies and grants in contrast to the complaints about direct costs of EU membership that are such a feature of the British press as well as viewing the other side of free movement of persons in Europe

While it has not been possible to survey businesses in each of these countries, including a sample of UK senior business decision makers has shown a number of clear contrasts with the consumer samples as well as some differences between businesses of different sizes.



## Methodology

We conducted online surveys among samples of general consumers in each of the UK, France, Germany and Poland as well as a sample of senior decision makers from UK businesses.

Respondents in each country were shown the same questions (translated into the required languages by native speakers). Some of the identification questions required country-specific answer sets but otherwise every effort has been made to ensure that respondents were answering the same questions.

In France, Germany and Poland, the consumer sample has been weighted to nationally representative criteria including age group, gender, region and how they voted in the last national election. For the UK, the sample has been weighted to nationally representative criteria including age group, gender, region, social grade and working status with the “current voting intention” question weighted to match Opinium’s most recently published political polls.

Sample sizes for the consumer surveys in each country were 2,069 in the UK, 1,017 in France, 1,001 in Germany and 1,030 in Poland.

For the business sample, interviews were conducted online among senior decision makers in businesses of a range of sizes. The criteria for respondents was to be a senior manager or above in a private sector business based in the UK but which bought or sold goods or services to or from parties abroad. The sample was split into segments of micro businesses (1-9 employees), small businesses (10-49 employees), medium sized businesses (50-249 employees) and large businesses (250+ employees) with the aim of approximately even sized segments rather than making the sample strictly representative of UK businesses generally.

Among businesses, there were 274 respondents with 81 coming from micro businesses (1-9 employees), 59 from small businesses (10-49 employees), 42 from medium sized businesses (50-249 employees) and 92 from large businesses (250+ employees).





## Executive Summary

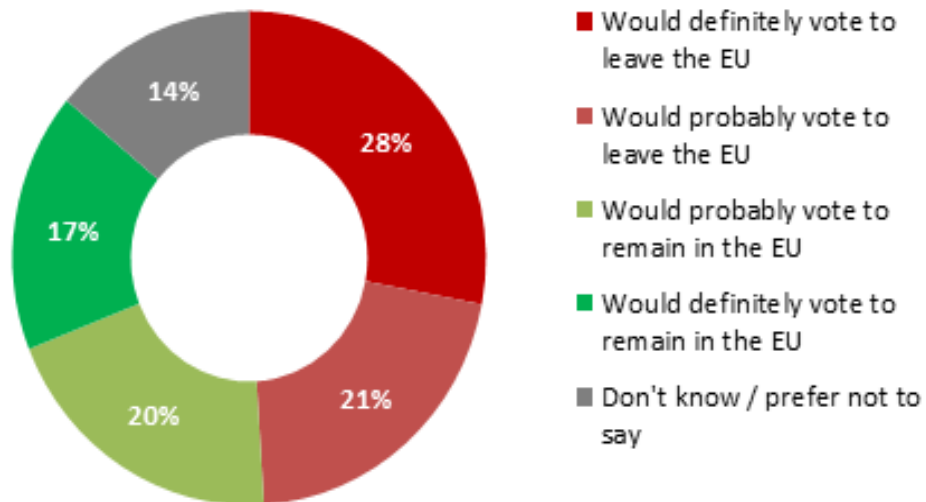
- British respondents are overwhelmingly the most negative about the European Union compared to other countries. 50% would vote to leave in a referendum held tomorrow while just 36% would vote to remain and these figures are consistent over the last year
- The reasons for this are threefold:
  - While people in the UK see the benefits of some areas of EU membership (specifically the lack of customs duties or tariffs, easing restrictions for businesses, tourism and travel), these are all overshadowed by the overwhelming majority saying that EU membership has had a negative effect on immigration to the UK
  - Respondents in the UK are also the least likely to feel in anyway European or any connection with other European countries. To Britain, Europe is “the other” which means that the processes and mechanisms by which the EU does things are as controversial as the effects that EU policy has / outcomes it achieves
  - British respondents are more likely to say leaving the EU will have a positive effect on various aspects of national life (and their own lives) but what is striking is how many don’t know or think exit will have no impact, meaning EU exit is seen as a low-cost option
- The single market, for people in the UK, is seen mainly as a lowering of restrictions and removal of barriers between countries and this is broadly supported. However, respondents oppose the multitude of compromises and agreements required to make these possible such as the free movement of workers / citizens and common rules made by EU institutions
- Business respondents, while hardly universally pro-EU, are slightly more positive in their responses. They are more likely to say EU membership is a good thing (47% vs. just 26% of UK adults generally) and that it has more benefits than drawbacks (40% saying more benefits vs. 19% of UK adults)
- Those from larger businesses (250 employees+) are also more likely to be pro-EU compared to smaller SMEs. Those with fewer than 10 employees are often as Eurosceptic as the general public

## British views of an exit

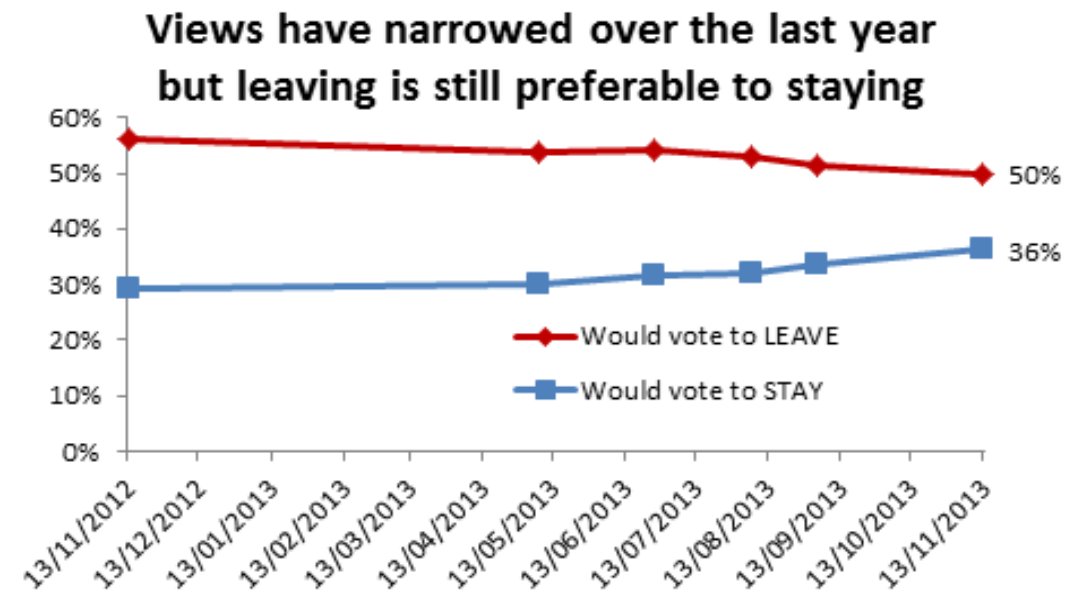
In a recent Opinium voting intention poll, 50% of likely general election voters said that they would vote to leave the EU while just 36% said they would vote to remain.

Labour voters are currently in favour of remaining members (48% vs. 36%) but Conservatives would vote to leave by a significant margin (58% to 33%).

### 50% would vote to leave, 36% to stay



While this gap may have narrowed over the last 12 months, the preference is still clearly for leaving over staying.



Voters also perceive little downside in leaving and are more likely to say things would be better after an exit than they are to say that things would be worse.

- 41% say that the economy would be better and 22% that it would be worse
- 29% say exit would have a positive impact on their personal standard of living, 15% a negative one
- 29% predict a positive impact on their day-to-day living costs, 18% a negative one
- 25% predict a positive impact on their job security and employment prospects, 12% a negative one



What is interesting is how many people think leaving the EU will make little or no difference. A fifth (20%) think that the economy would do about as well in the EU as out of it, 41% predict either a neutral impact or none at all on their standards of living, 36% said this about their living costs and 44% said it about their job security and employment prospects.

Respondents were evenly divided on whether leaving the Union would make the UK more or less attractive to international companies (26% saying more and 26% saying less) but, again, 32% said “about the same”.

When it comes to the UK’s foreign relations and standing internationally, the striking thing again is how little effect people believe leaving the EU would have.

- 37% say leaving would have a positive impact on relations with the United States, 12% predict a negative one and 37% predict either a neutral impact or none at all
- For Commonwealth countries, 38% expect a positive impact, 9% a negative one and 38% neutral or no impact
- On the UK’s standing in the world generally, 29% said positive impact, 22% negative impact and 34% a neutral impact or none at all

Understandably, respondents expected an EU exit would damage relations with EU countries (45% negative, 11% positive) but even here, a substantial proportion believe that EU exit would have a neutral impact or none at all (30%).

Although 50% of likely voters would vote to leave the EU, none of these measures had a similar proportion of people saying leaving the EU would have a positive impact. Overall, leaving the EU is not seen as a particularly consequential act and, in light of the perceived drawbacks (such as immigration, financial costs and the imposition of “foreign” directives), it is hardly surprising that more people see leaving as a net-positive.

The contrast with business respondents is interesting. More (37%) say that withdrawal would be bad for British business in general (40% of those in large companies) than say it would be good (32%, 33% in large companies).

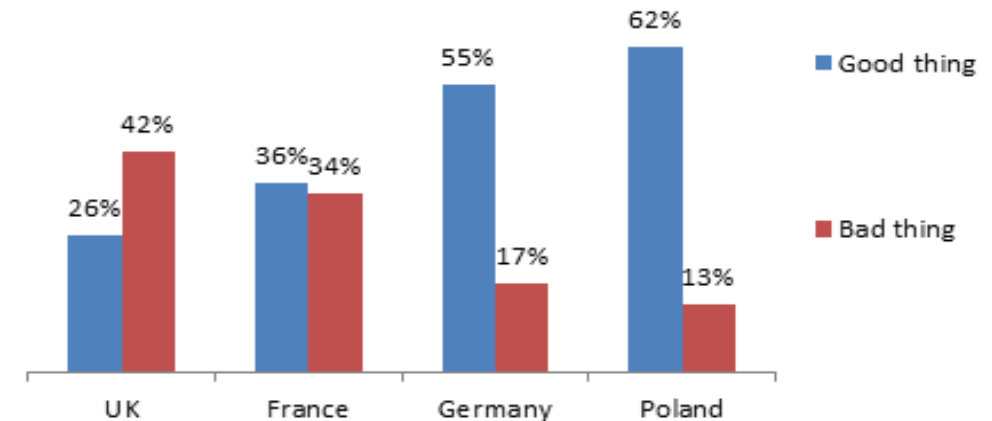
A narrow plurality (35%) think it would make the UK less attractive for international businesses and 34% think it would be bad for the UK’s standing in the world generally.

## EU audit

So what are the benefits and drawbacks of EU membership?

Among all countries, people in the UK are the least likely to say that membership of the EU has historically been a good thing and are also the most likely to say that there are currently more drawbacks than benefits.

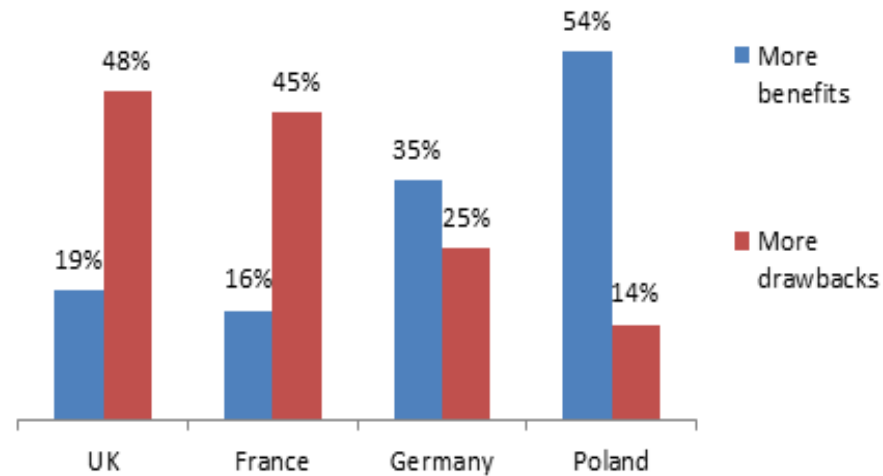
### Is EU membership a good thing or a bad thing?





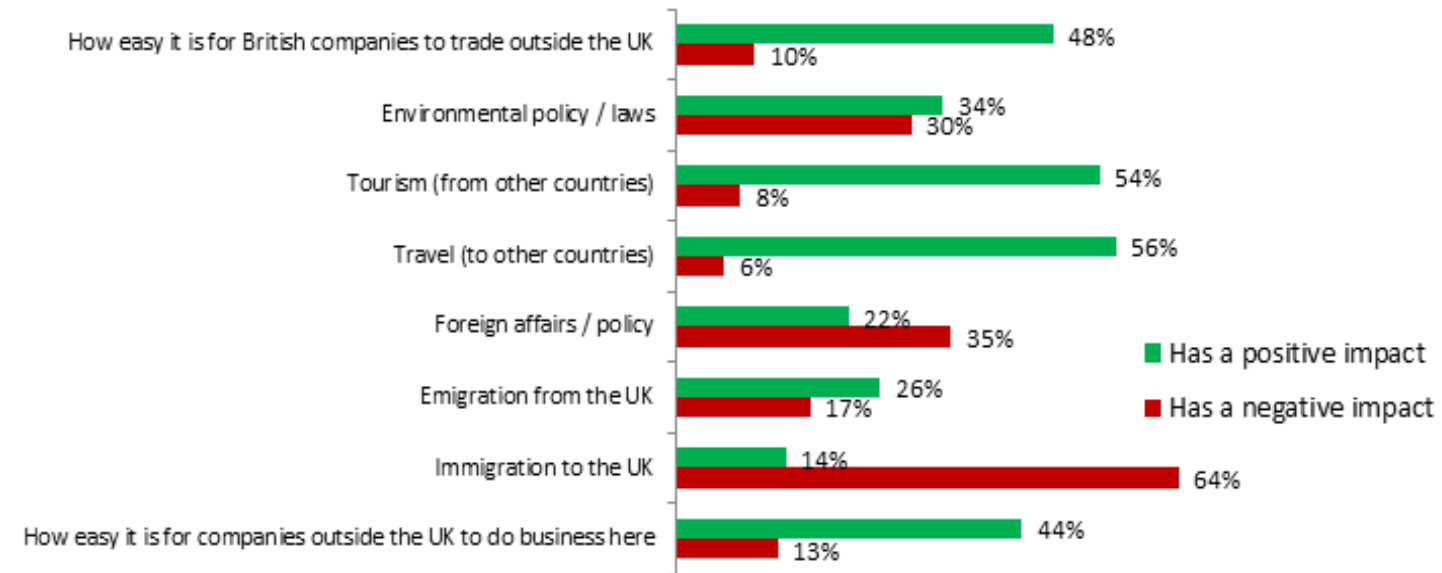


## Does EU membership bring more benefits or drawbacks?



Looking at individual aspects of EU membership, in Britain most areas are seen as either neutral or having a positive effect with one significant exception: immigration to the UK.

## The negative impact of immigration overshadows other positive to neutral effects of EU membership





Although the items included in the list cannot possibly include all the possible facets of EU membership, the perceived negative impact of immigration appears to overshadow the benefits of the other areas where membership is seen to have a positive impact. In effect, people like the benefits that more open borders bring (such as easing travel and tourism and lowering restrictions for businesses) but dislike the logical extension of this in the form of immigration.

Hostility to immigration alone, though extremely important, does not explain all of the opposition to EU membership. When given an open response question asking for the biggest drawbacks to EU membership, the most popular category of answers was “Laws” (33% of those giving an answer) including various types of regulation from EU institutions and ahead of immigration (24%).

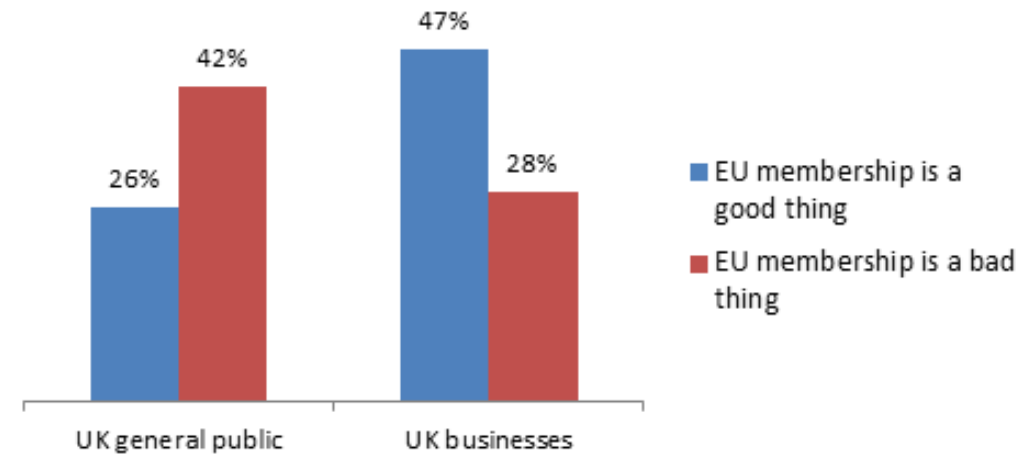
The third most mentioned category of drawbacks was “Waste / cost” (20%) which included all mentions of the direct financial contribution that the government makes to EU institutions, general complaints about too much money being wasted and complaints about money being spent on subsidies going outside the UK.

These two categories were not included in the question that forms the above chart because they are more about how the EU functions than the effects on specific policies. However, the fact that complaints about the process rather than the results are so prominent gives us an idea of the issues of legitimacy people in the UK have about the EU. Complaints in both the “Laws” and “Cost” categories could more crudely be expressed as “taking orders from foreigners” and “giving money to foreigners” while immigration speaks for itself.

## EU Audit – UK consumers vs. businesses

In contrast to the general public, businesses in the UK are considerably less Eurosceptic. They are more likely to say that membership is a good thing and that it brings more benefits than drawbacks.

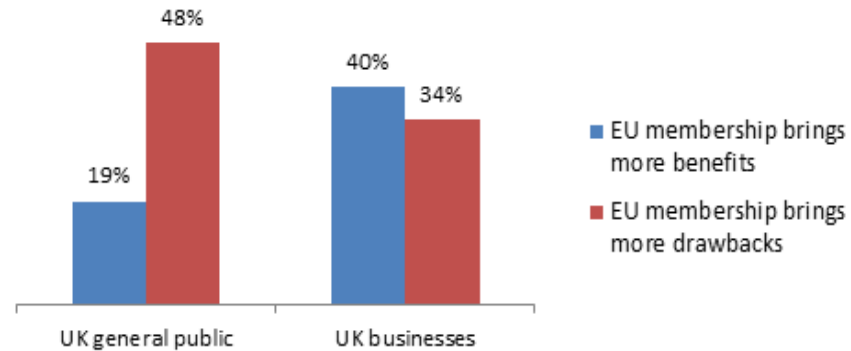
### Business are far more likely to call EU membership a good thing







### Business are more likely to say EU membership has more benefits than drawbacks

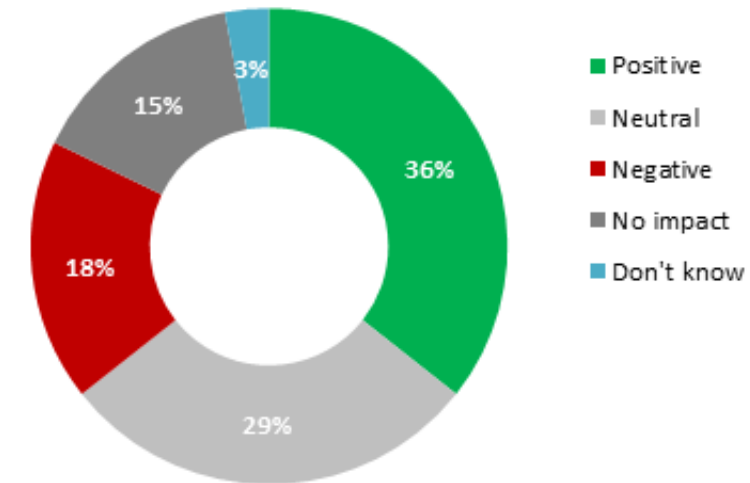


However, there were interesting differences between businesses of different sizes with respondents from large companies (250+ employees) being generally more positive than those from smaller companies, particularly micro businesses (0-9 employees).

Micro business respondents were evenly divided on whether EU membership is good (38%) or bad (40%) compared to far more positive larger businesses (57% good, 16% bad). Similarly, on whether membership currently has more benefits or drawbacks, micro businesses were negative (30% more benefits, 48% more drawbacks) than large ones (46% more benefits, 22% more drawbacks).

When asked specifically about their business, most respondents believed the impact was positive or neutral with just 18% saying it had a negative impact:

### Does being in the EU have a positive or negative impact on your business?



Again, positive feeling is most likely among those with 250 or more employees (43% positive, 17% negative) but this is true even among micro businesses (28% positive, 19% negative).

On individual aspects of EU membership, business respondents are also more positive than the general public.

## Does EU membership bring more benefits or drawbacks? (% saying "positive impact" minus % saying "negative impact")



The first two categories ("how easy it is for British companies to do business in countries outside the EU" and "in other EU countries") were a more detailed version of "how easy it is for British companies to trade outside the UK" that were asked to business respondents only

On each issue, businesses are more positive, or less negative, than the general public. Even immigration, though still the most negative area, a sizeable minority believe the EU has a positive effect (27% vs. 57% saying it has a negative effect).

The same is true of whether existing features of EU membership are benefits or drawbacks.

Business respondents were more emphatically positive about the single market areas of the EU, 68% call the lack of customs, duties or tariffs between member states a benefit vs. 46% of the general public and 42% called a common set of rules for business across the EU a benefit while consumers generally were split (27% benefit, 28% drawback).

On the idea of free movement of workers and citizens, 38% of business respondents called it a benefit while 30% called it a drawback. The numbers for the general public are almost the exact opposite with 24% calling it a benefit and 38% a drawback.

## A narrow view of the single market

The most commonly talked about benefit of EU membership among commentators and the media is access to the Single Market and the research supports this. When asked whether each of the commonly mentioned "features" of EU membership is an advantage or a disadvantage, the only one to enjoy clear support in the UK was "no customs duties or tariffs on goods or services bought or sold between EU countries" (46% to 10% calling it an advantage).

Yet this support assumes a very narrow definition of the "single market" that is, unsurprisingly, focused almost exclusively on the consumer-facing parts of it such as the lack of customs or duties when crossing borders. In contrast there is relatively limited support for the other features which comprise the single market. A common set of rules for businesses across the EU (27% support, 28% oppose), EU rules on workers' rights and restrictions (23%, 30%) and citizens of any EU country having the right to live work, study, settle or retire in any other EU country (24%, 38%) all attract divided opinions or more opposition than support.

In fact every "feature" of EU membership apart from the lack of customs duties and the EU negotiating on behalf of member countries with organisations like the WTO and large economies like China (28%, 21%) saw more people in the UK call them a drawback than a benefit. Contrast this to Germany and Poland, where every item in the list was seen as a benefit, and even France where more people saw each item as a benefit than a drawback with the exception of EU labour rules where opinion was evenly divided.

British business respondents had a more rounded view of the Single Market and were positive about every aspect of EU membership except subsidies (such as the Common Agricultural Policy) and EU rules on workers' rights / restrictions.



## How culture and attitudes affect views of Europe

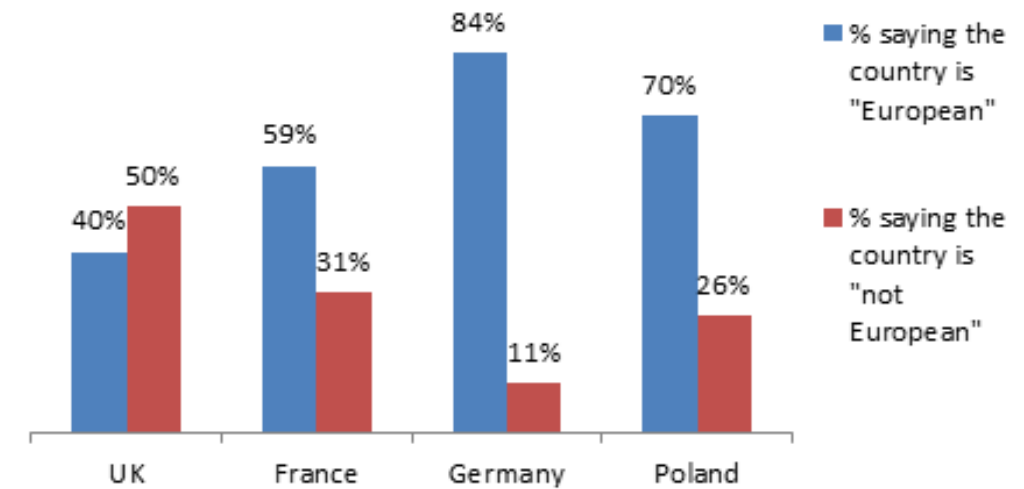
The other source of hostility to the EU is hostility (or a lack of affection) for Europe generally. People in the UK are less likely to feel an affinity for Europe or the countries within it than any of the other countries we surveyed.

A lot of these findings are not particularly controversial. That Britain has never considered itself to be a part of “core Europe” is well known with Churchill’s “open seas” quote coming to mind. The relevance to this research however is in highlighting the additional barrier that the EU faces in convincing people in the UK of the merits of membership.

As we have seen, some of the biggest complaints about the EU are the amount of money that the British government contributes and regulation and legislation that is passed back by EU institutions. Both of these are common aspects of the modern state which typically pass without comment when done at a national level but which arouse additional resentment when done at the EU level.

The fact that the British generally do not feel part of Europe helps explain why support for membership is so dependent on tangible and transactional benefits and why the default attitude to the European Union is hostile rather than welcoming. In any system of transference, it is vital that those contributing feel an affinity with those receiving and in the UK that affinity does not appear to exist.

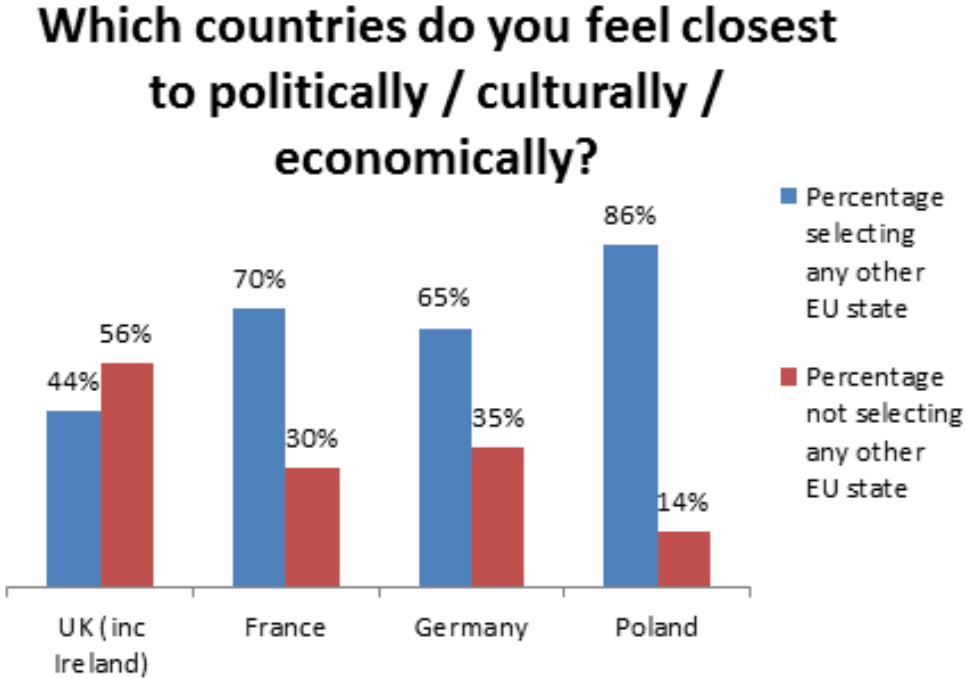
## Is your country today European or not European?



People in Britain were less likely to say the country was “European” and the least likely to select other EU countries when asked who they felt closest to. The most popular in the UK were other English-speaking countries such as the United States (33%), Australia (31%), Canada (23%), New Zealand (23%) or Ireland (23%). The most popular non-English speaking countries were Germany (14%) and France (11%).

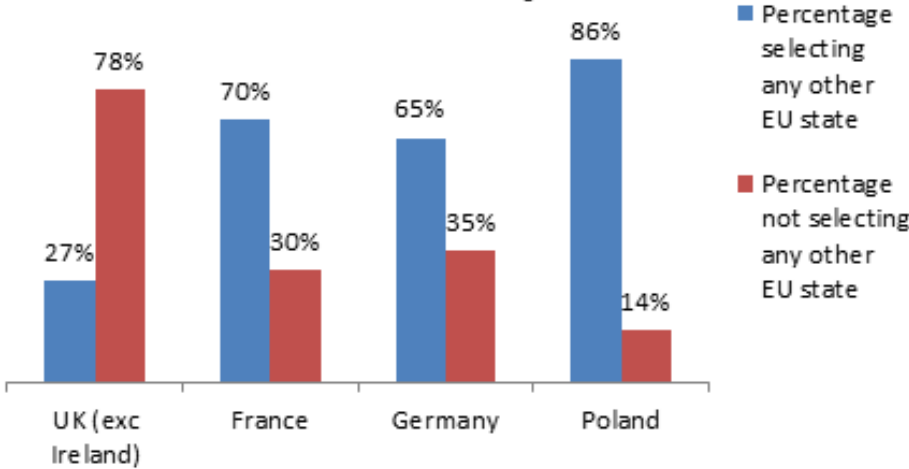


The table below shows the percentage of respondents in each country that selected any other EU country and the percentage that did not. Although already lower than any other country, the UK figure is only as high as it is due to Ireland's status as an EU member.



If we remove Ireland so that the blue column only includes non-English speaking EU countries then the contrast becomes even starker.

### Which countries do you feel closest to politically / culturally / economically?



This extends to self-identification as well. Out of a range of possible descriptions, ranging from “European” at the top through national identifiers (British, French etc), regional and local town / city identifiers, fewer respondents in Britain selected “European” than in any other country.

	UK	France	Germany	Poland
% saying “European” is ONE OF the words that could describe them	14%	34%	39%	48%
% saying “European” is THE WORD THAT BEST describes them	4%	16%	23%	20%





## What is the ideal “level” of European Integration?

This section of the survey tried to pick out how much, or little, integration between EU countries respondents would be happy with.

The policy areas that people in the UK are most likely to think should be handled by the European Union are trade relations with non-EU countries (24%) and environmental policy (25%) yet even these are far below their equivalent figures in other countries. These were the two most popular options in every country but the percentage in France believing the EU is the most appropriate level of government to handle trade relations with non-EU countries is 46%. In Germany it is 50%.

Another area that was included when asking this was taxation. The reason for including this, given the expectation that an overwhelming majority in each country would choose “national governments”, was to provide a floor for support for the European level. Whatever percentage said that EU level should be responsible for taxation can be assumed to be the hard-core advocates of deeper European integration.

In the UK it was 7% compared to 17% in France and 19% in each of Germany and Poland.

Appropriately therefore, when asked what their ideal level of integration would be, 7% in the UK chose the option “*all matters affecting more than one country are handled by the EU level with no national vetoes*” as did 14% in France, 20% in Germany and 15% in Poland.

In all countries, the most popular option was Option 2:

“*Some matters are handled by the EU but countries are able to opt-out and use national vetoes to protect their interests.*”

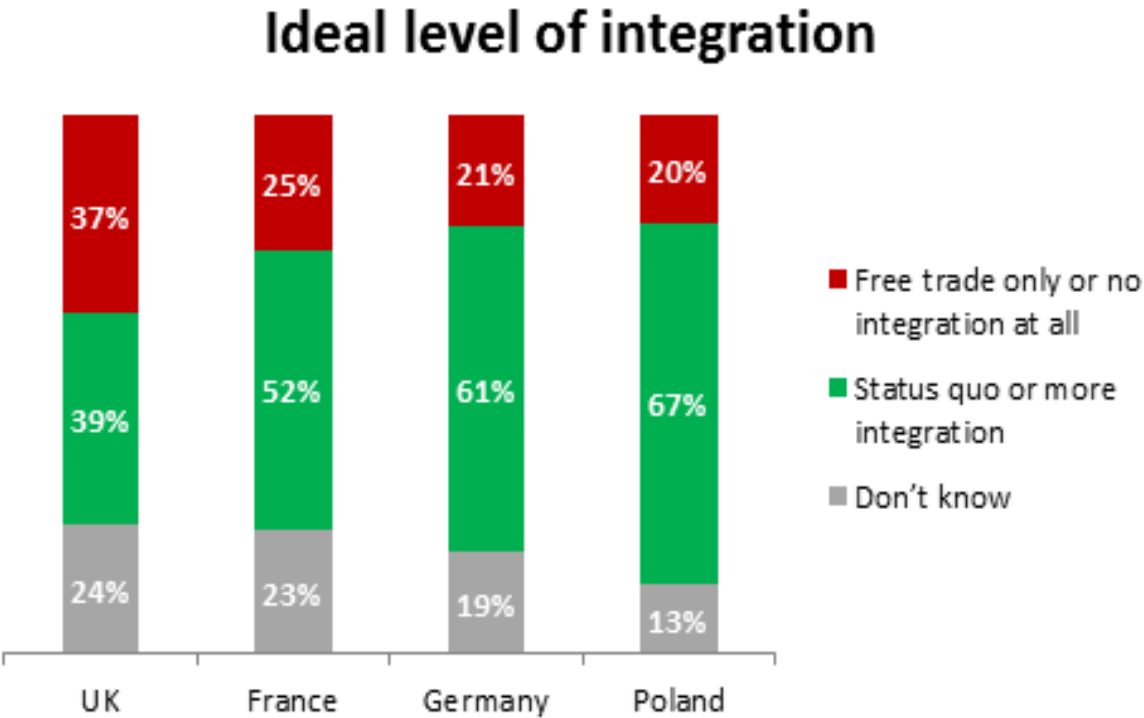
Around four in ten respondents in France (38%) and Germany (41%) selected this option, as did half of those in Poland (52%). However just under a third in Britain chose this (32%) and the two “less integrated” options both saw the strongest support in the UK:

	UK	France	Germany	Poland
1. All matters affecting more than one country are handled by the EU level with no national vetoes	7%	14%	20%	15%
2. Some matters are handled by the EU but countries are able to opt-out and use national vetoes to protect their interests	32%	38%	41%	52%
3. Only matters affecting free trade between countries are handled at the EU level and these require the consent of all member states	18%	14%	16%	11%
4. There is no single Europe-wide organisation but just separate free trade agreements between individual countries	19%	11%	5%	9%
5. Don't know	24%	23%	19%	13%

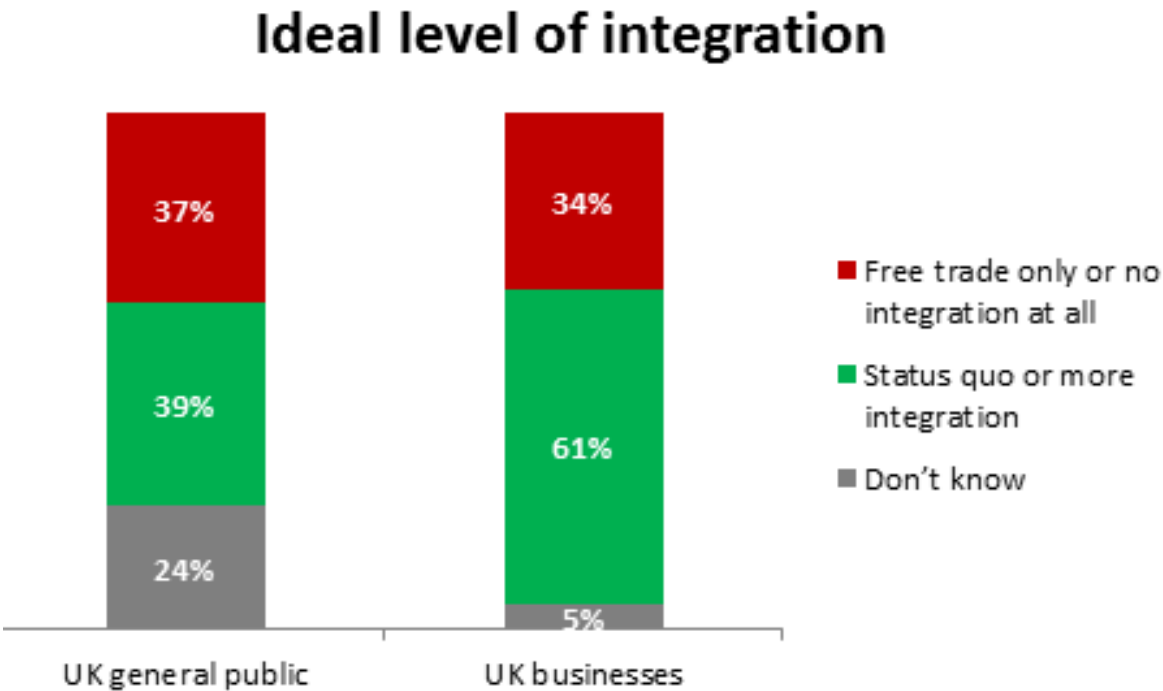
Option 2 is effectively the “goldilocks” option (i.e. not too hot or too cold but just right) as respondents will likely assume that there will be a national veto in areas where they think co-operation is undesirable and co-operation in areas where they think it is desirable.

It is, however, also the option closest to the status quo, within the confines of how much detail is possible in a survey question and any “renegotiation” of Britain’s position in the EU would likely also fall into this category.

If we assume that Option 2 was seen as the status quo option by respondents then we see that people in the UK are almost evenly divided between demanding less integration (37%) and accepting the status quo or even demanding more (39%).



When UK businesses are added to the equation, their pattern of agreement looks more like one of the other EU countries than the rest of the UK. Nearly half (46%) of the business sample selected Option 2 and 15% wanted a more integrated EU (making 61% in total) with the main difference between the consumer and business respondents being a far lower proportion answering “don’t know”.



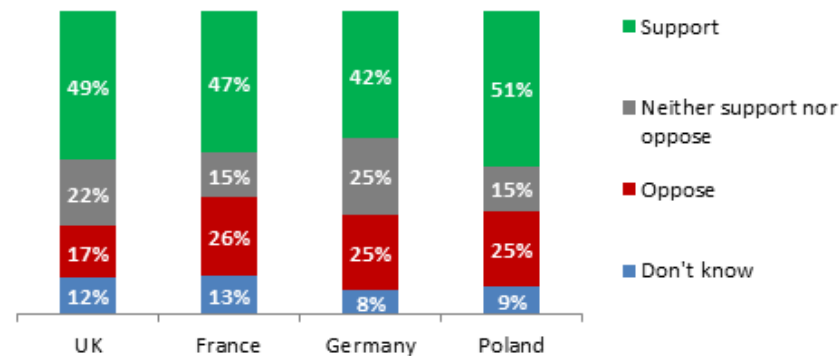


## Differing levels of membership

Across all countries, there was a degree of support for the idea of different “levels” of membership where there are policies that all countries have to be a part of (e.g. trade, the single market) but some which countries can opt-out of (e.g. criminal justice or Euro membership).

To an extent though this may be because respondents in each country are assuming an idealised arrangement where the areas they think are important are handled at the national level and those which are less important are handled by the EU.

### All countries support the *idea* of different levels of membership



Support was lowest in Germany while the proportion either slightly or strongly opposed (25%) was constant in each non-UK country albeit with varying levels of intensity. UK business respondents were particularly positive with 68% supportive (36% strongly, 31% slightly) and just 12% opposed.

However, this does not translate into support for giving the UK a special deal. Respondents in non-UK countries were asked if they would support the UK remaining in the EU and being able to opt-out of some areas of policy.

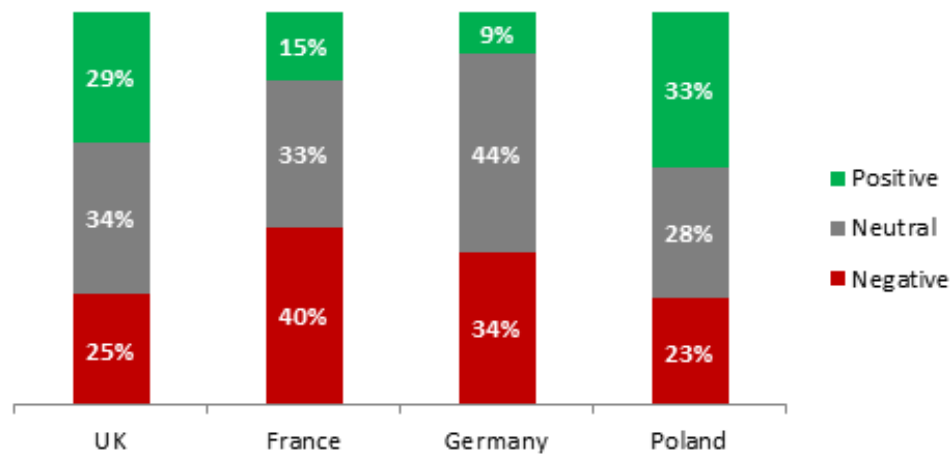
German respondents in particular opposed this (44% vs. 16% supporting) while France was more narrowly opposed (26% support, 36% oppose). Only Poland was more supportive (38%) than opposed (23%).

As German respondents were the least likely to support the idea of different levels of membership, it is hardly surprising that they are opposed to the UK being able to pick and choose which parts of the EU they choose to be members of. Similarly, as we shall see, Poland is the country with the most positive view of the UK and therefore most likely to support measures to keep Britain in the EU.

## Europe's opinion of Britain

Reluctance to offer the UK a special deal may have something to do with the fact that very few people in France or Germany consider it to be a positive influence in the EU.

### Is the UK a positive or negative influence in the EU?

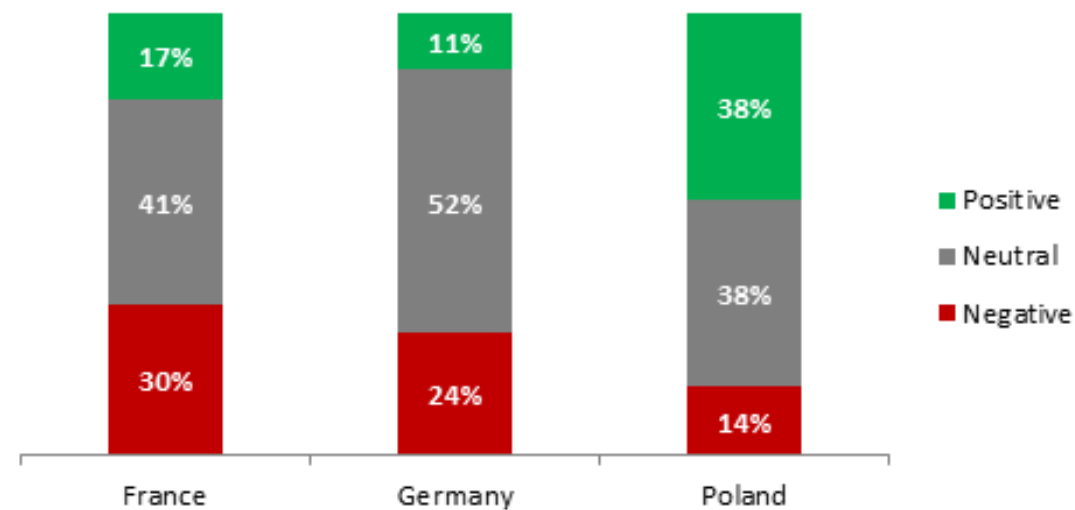


While Poland is more likely to call the UK a positive influence than any other country (even the UK itself), the best that can be said about France and Germany is that so many say the UK has a neutral impact rather than an overtly negative one.

In contrast to the general public, UK business respondents are the exception here with 41% calling the UK a positive influence and 26% a negative one.

Poland is also the most likely to say that the UK being a member of the EU has a positive effect on their country specifically with the most negative responses coming, again, from France.

### Does UK have positive or negative impact on your country?



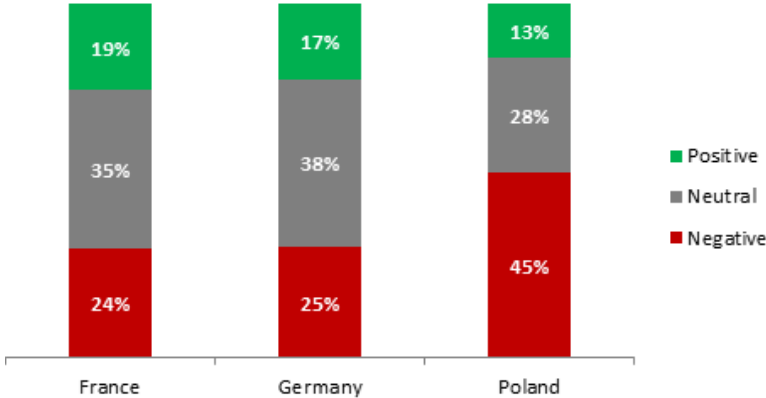




## Europe has mixed views of the UK leaving

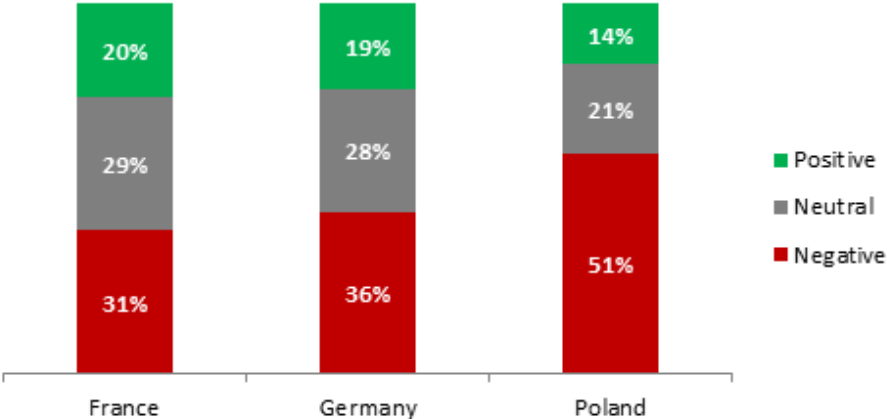
Despite this though, more people think the UK leaving would be bad for their country than think it would be good, particularly in Poland.

Would the UK leaving have a positive or negative effect on your country?



The prospect of a member state leaving is expected to have an even more negative effect when asked about the impact on the EU as a whole. This is particularly true in Germany where “negative” rises from 25% to 36% and “neutral” drops from 38% to 28%.

Would UK leaving have positive or negative effect on the EU as a whole?



So while respondents in Germany think an EU withdrawal by the UK would be more negative than positive for Germany, they are more concerned about the potentially disruptive impact of a member state leaving for the Union as a whole.



## Reasons for supporting or opposing a “Brexit”

The most popular category of open text responses, when asked why the UK leaving would be good or bad for their country, was that the UK would no longer be able to act as a spoiler, preventing the EU from moving ahead (41% of those in Germany saying it would have a positive impact). There were also concerns that a British exit would result in Germany having to shoulder more of the financial burden (30% of those saying it would have a negative impact).

Results were similar in France with 37% of those saying a British exit would have a positive impact citing the removal of the UK as a disruptive influence that would allow the EU to work better. Again, the most commonly cited drawbacks were economic with 27% of those saying it would have a negative impact citing the economic effects of a country leaving.

In Poland, understandably, there were concerns about the effect on Poles in the UK and immigration (55% of those saying it would have a negative impact) while just 13% of those saying it would have a positive impact cited emigration being cut.

Among the other reasons for wanting the UK to leave the EU were variations of the idea that the UK has never been “part of Europe” or has always been in some way separate. We have seen in the culture and attitudes section that the UK is more likely to identify with other English speaking countries than the rest of Europe and respondents in these countries largely believe that the UK is closer to the United States than the rest of the EU.

Respondents were asked who the UK would tend to support on occasions when there are disagreements between the United States and EU countries. While Poland, another generally pro-American country, thought there was an even split (18% US, 18% EU, 38% neutral), Germany thought the UK was narrowly pro-American (25% US, 19% EU, 28% neutral) and France was unambiguous with 41% saying the UK would normally support the US over Europe vs. just 11% saying it would support EU countries.

People in the UK appear to agree with the French on this issue with 37% saying Britain would normally take the side of the US vs. 10% saying it would support the EU while 35% believe it would be neutral or support the US as often as it supports the EU.





## Conclusions

That Britain is hardly a cheerleader for the European Union is unsurprising and our research points to three possible sources of such feelings.

The first is that while British respondents see some benefits, citing particularly the effects of the Single Market, the way the EU affects immigration is viewed mostly negatively and this overwhelms the mildly positive effects the EU is seen to have elsewhere.

The second is that while immigration has without doubt fuelled the rise in anti-EU sentiment over the last few years, a more structural source of Euroscepticism is the fact that people feel less affinity with Europe than those in other, more convincingly “European”, countries. Europe is seen decidedly as “the other” and the EU has the feeling of being a foreign project rather than serving all members of a group that Britain feels a part of.

This colours perceptions of everything the EU does. Laws and rules which the British government and British MEPs may agree to become foreign diktats while contributions to the overall pot from which all members draw become mandatory foreign aid and “waste”.

Europe is no doubt an emotive issue for a substantial segment of the population and the most popular option in our referendum polls is inevitably “would definitely vote to leave the EU” rather than “would probably vote to leave the EU” or either of the options to remain. Yet the other side of this issue, and the third source of Eurosceptic feelings, is apathy.

When the question is put in front of them, more think leaving the EU would be positive than negative but the most popular options, particularly on how the EU would affect them individually, tend to be “neutral impact” or “no impact”.

While most questions in this survey were “closed” (i.e. respondents were presented with

question text and a series of possible answers to tick) and therefore relatively easy for even the most disengaged respondent to answer, for those that required a typed in answer around a third of respondents ticked the “don’t know” opt-out option, indicating that their engagement with the issue is relatively superficial.

The combined effect is that people in the UK are, on balance, in favour of leaving the EU because they don’t think the effect will be particularly damaging and therefore the perceived costs of membership outweigh the perceived lack of cost in leaving. However, the fact that so many are disengaged from the issue means that while Europe is a highly charged issue for some, there is such a gap of information and feeling generally that the effects of a referendum campaign could be substantial.

This research also offers some takeaways for each side in a potential referendum campaign.

For those advocating withdrawal, the issue of immigration is clearly an emotive one and clearly linked to EU membership given the foundational principle of freedom of movement. The areas of disillusionment with the EU (immigration, cost and imposition of “foreign” rules) are familiar to anyone who follows the news but this research shows how dominant they are in the public’s view of the European Union and how much public support depends on tangible, transactional benefits.

For those who wish to keep Britain in the EU, the fact is that a large section of support for withdrawal rests on the idea that leaving the EU would be relatively painless and that if the dangers and drawbacks of leaving were to be made clear then these may be votes that can be turned. As we have seen in the Scottish independence referendum, the points that cut through the most have been those highlighting how Scotland could lose out if it became independent. If the British public believe that leaving the EU is a relatively cost-free option then putting these costs front and centre may be the most direct and effective way of convincing them to stay.

Would the British public ultimately vote to leave the EU in a referendum? The evidence here suggests that they would but it is by no means as certain as it is often portrayed.



## Appendix – Generational differences

Although respondents in Britain appear starkly Eurosceptic, there are some significant generational differences within the UK sample with the general trend being that Euroscepticism and age are correlated.

To give some examples:

- While 40% of all UK adults called the country European and 50% said it was not, among those aged 18-34 the figures were 45% and 43% respectively
- Younger people are also more likely to say EU membership has been a good thing (35%) than those aged 55+ (20%) and less likely to say it has been a bad thing (25% vs. 56% of those aged 55+)
- Two third of those aged 55 or over say that EU membership has more drawbacks than benefits (63%) while 18-34 year olds are evenly split, 26% saying there are more benefits and 29% that there are more drawbacks
- 18-34 year olds are the only age group that would vote to remain in the EU in the event of a referendum held tomorrow (42% remain, 37% leave) compared to 50% of 35-54 year olds and 58% of those aged 55+. *Figures from Opinium voting intention survey, 12th November 2013*

This effect appears throughout the survey and 18-34 year olds are likely to offer more positive answers at most questions and on most aspects of EU membership.

This also appears to be the case in other, more pro-European, countries as well. In France the proportion calling EU membership a good thing is only narrowly more than the proportion calling it a bad thing (36% good, 34% bad). But among 18-34 year olds 40% called it a good thing and 29% a bad thing. 18-34 year olds were the most likely to say there were more benefits than drawbacks (though still negative on balance) as well as being the most likely to say the UK is a positive influence in Europe. 19% called the UK a positive influence and 23% a negative one compared to 12% and 53% respectively among those in France aged 55+.

Younger respondents are the only age group to say that the UK being a member of the EU has a positive effect on France (22% vs. 18% negative and compared to 13% and 42% among those aged 55+). They are also the only age group to support giving the UK a special deal to remain in the EU (33% support, 21% oppose).

## Appendix – Generational differences (cont)

In Germany things are slightly more complicated. 18-34 year olds are generally slightly more pro-European than the national average but those aged 55+ are often positive as well with a higher than average proportion giving positive answers while the same proportion give negative answers.

The 35-54 year old age group are generally more negative than the national average as shown by the fact that 59% of 18-34 year olds and 58% of those aged 55+ in Germany say EU membership is a good thing vs. just 48% of those aged 35-54.

Those aged 35-54 are also less likely to say EU membership brings more benefits than drawbacks with 30% saying there are more benefits, only slightly more than said there are more drawbacks (29%). By comparison, 36% of 18-34 year olds and 38% of those aged 55+ said that there are more benefits.

This again continues throughout the survey although when asked whether various features are a benefit or a drawback, the most likely group to call each item a benefit are those aged 55+.

The older generation are the most likely to call the UK a negative influence (44% vs. 34% overall) and the least likely to support giving the UK a special deal to remain (13% support, 51% oppose vs. 26% and 32% for those aged 18-34).

Poland saw little in the way of a consistent gap between age groups. Similar levels said EU membership had more benefits than drawbacks (54% of 18-34 year olds, 52% of 35-54 year olds and 55% of those aged 55+), and that was a good thing (63%, 58% and 64% respectively).

Older Poles were more likely to say that the EU has had a negative effect on emigration from Poland (41% negative vs. 26% of 18-34 year olds) while those in the 35-54 age group were slightly more likely to say the EU has negatively affected environmental policy (28% vs. 21% of over 55's).

Older Poles are also most likely to say the UK is a bad influence in the EU (33% vs. 16% of those under 35).



Appendix – Country profiles

Country profiles	<b>France</b>
Countries respondents feel closest to	Germany (37%), Belgium (25%), UK (19%)
Things / moments from country's history that respondents are most proud of	Revolution / 1789 (16%), Rights / Human rights (12%), Democracy / welfare (8%)
Has EU membership been a good thing or a bad thing?	36% good / 34% bad
Does EU membership have more benefits or drawbacks?	16% more benefits / 45% more drawbacks
Areas where EU membership has a positive impact	Travel (69%),Tourism (67%), Easy for foreign companies to do business here (40%)
Areas where EU membership has a negative impact	Immigration to France (59%), Emigration from France (25%), Foreign affairs / policy (24%)
Biggest benefits of EU membership	Citizens of EU countries having the right to live, work, study, settle or retire in another EU country (45%), No customs duties or tariffs (45%), Common set of rules for business across all EU countries (39%)
Biggest drawbacks of EU membership	Common set of rules for business across all EU countries (28%), EU rules on workers' rights / restrictions (27%), Subsidies and support for famers, fishers etc (26%)
Support or oppose idea of different levels of membership?	47% support / 25% oppose
UK a positive or negative influence?	15% positive / 40% negative
UK membership positive or negative for France?	17% positive / 30% negative
Support or oppose a special deal for the UK?	26% support / 36% oppose
Positive or negative impact on France if the UK left the EU?	19% positive / 24% negative
Positive or negative impact on EU as a whole if the UK left the EU?	20% positive / 31% negative

Appendix – Country profiles

Country profiles	<b>Germany</b>
Countries respondents feel closest to	Austria (30%), Switzerland (27%), Netherlands (20%), France (16%)
Things / moments from country's history that respondents are most proud of	Reunification (24%), Culture (18%), Post war reconstruction (11%)
Has EU membership been a good thing or a bad thing?	55% good / 17% bad
Does EU membership have more benefits or drawbacks?	35% more benefits / 25% more drawbacks
Areas where EU membership has a positive impact	Travel (76%),Tourism (69%), How easy it is for German companies to trade outside (67%)
Areas where EU membership has a negative impact	Immigration to Germany (42%), Environmental policy / laws (19%), Foreign affairs / policy (10%)
Biggest benefits of EU membership	No customs duties or tariffs (60%), Citizens of EU countries having the right to live, work, study, settle or retire in another EU country (52%), Common set of rules for business across all EU countries (38%)
Biggest drawbacks of EU membership	Subsidies and support for famers, fishers etc (22%), EU rules on workers' rights / restrictions (17%), Common set of rules for business across all EU countries (17%)
Support or oppose idea of different levels of membership?	41% support / 25% oppose
UK a positive or negative influence?	9% positive / 34% negative
UK membership positive or negative for France?	11% positive / 24% negative
Support or oppose a special deal for the UK?	16% support / 44% oppose
Positive or negative impact on France if the UK left the EU?	17% positive / 25% negative
Positive or negative impact on EU as a whole if the UK left the EU?	19% positive / 36% negative

Appendix – Country profiles

Country profiles	<b>Poland</b>
Countries respondents feel closest to	Germany (32%), UK (28%), Czech Republic (24%)
Things / moments from country's history that respondents are most proud of	Independence (29%), Identity (14%), Character (14%)
Has EU membership been a good thing or a bad thing?	62% good / 13% bad
Does EU membership have more benefits or drawbacks?	54% more benefits / 14% more drawbacks
Areas where EU membership has a positive impact	Travel (85%),Tourism (84%), How easy it is for Polish companies to trade outside (61%)
Areas where EU membership has a negative impact	Emigration from Poland (33%), Environmental policy / laws (23%), Im-migration to Poland (20%)
Biggest benefits of EU membership	Citizens of EU countries having the right to live, work, study, settle or retire in another EU country (77%), No customs duties or tariffs (76%), Subsidies and support for famers, fishers etc (72%)
Biggest drawbacks of EU membership	EU rules on workers' rights / restrictions (16%), Common set of rules for business across all EU countries (15%), EU negotiating on behalf of member countries (11%)
Support or oppose idea of different levels of membership?	52% support / 25% oppose
UK a positive or negative influence?	33% positive / 23% negative
UK membership positive or negative for France?	38% positive / 14% negative
Support or oppose a special deal for the UK?	38% support / 23% oppose
Positive or negative impact on France if the UK left the EU?	13% positive / 45% negative
Positive or negative impact on EU as a whole if the UK left the EU?	14% positive / 51% negative

Appendix – Business comparisons

Country profiles	<b>UK general public</b>	<b>UK businesses</b>
Countries respondents feel closest to	United States (33%),Australia (31%), Canada (23%), New Zealand (23%)	N/A
Things / moments from country's history that respond-ents are most proud of	Traditional e.g. Monarchy (22%), Military e.g.WW2 (15%), Industry (10%)	N/A
Has EU membership been a good thing or a bad thing?	26% good / 42% bad	47% good / 28% bad
Does EU membership have more benefits or drawbacks?	19% more benefits / 48% more drawbacks	40% more benefits / 34% more drawbacks
Areas where EU membership has a positive impact	Travel (56%),Tourism (54%), How easy it is for British companies to trade outside (48%)	Tourism (70%),Travel (70%), How easy it is for British companies to do business in other EU countries (66%)
Areas where EU membership has a negative impact	Immigration to the UK (64%), Foreign affairs / policy (35%) Environmental policy / laws (30%)	Immigration to the UK (54%), Environmental policy/laws (35%), Foreign affairs / policy (34%)
Biggest benefits of EU membership	No customs duties or tariffs (46%),EU negotiating on behalf of member countries (28%), Common set of rules for business across all EU countries (27%)	No customs duties or tariffs (68%), Common set of rules for business across all EU countries (42%), EU negotiating on behalf of member countries (41%)
Biggest drawbacks of EU membership	Citizens of EU countries having the right to live, work, study, settle or retire in another EU country (38%), Subs-idies and support for famers, fishers etc (30%), EU rules on workers' rights / restrictions (30%)	Subsidies and support for famers, fishers etc (41%), EU rules on workers' rights / restrictions (40%), Citizens of EU countries having the right to live, work, study, settle or retire in another EU country (30%)
Support or oppose idea of different levels of member-ship?	49% support / 17% oppose	68% support / 12% oppose
UK a positive or negative influence?	24% positive / 29% negative	41% positive / 26% negative
UK membership positive or negative for France?	N/A	36% positive / 18% negative
Would vote to stay or leave in a referendum	49% leave / 29% remain (figure from main survey, other referendum figures taken from bi-weekly polling)	45% leave / 45% remain
Economy better or worse if UK left EU	41% better / 22% worse	38% better / 31% worse
Leaving the EU make UK more or less attractive to international companiesleft the EU?	26% more attractive / 26% less attractive	27% more attractive/ 35% less attractive



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