



The Impact of Brexit on consumer behaviour



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Foreword

James Endersby, CEO of Opinium

It has been thrilling teaming up with the London School of Economics and the ECREP electoral psychology team for the past six years. This report represents the culmination of our joint work around the world uncovering and understanding how and why people make their voting decisions.

It is extremely fitting that we have joined forces once more to provide insight into the hearts and minds of the British voter as they sit poised to cast their votes for what is clearly an important moment for the country.

Our latest poll for the Observer this past Sunday* shows 43% plan to vote remain in the EU vs. 41% who plan to vote leave. But those who are currently undecided could of course have the biggest impact. When we nudged, or forced, them to make a decision, 36% of those yet to make up their mind said they'd vote to remain, 33% would vote leave. It is still incredibly close.

You would need to have had your head buried firmly in the sand to miss the constant buzz of campaigning in recent months and the cases made by both 'Leave' and 'Remain' camps has been widely reported in all forms of media. If you missed any of that, you'd certainly have heard opinions down at your local pub or around the dinner table, in church, mosque, temple, supermarkets, car parks... in short, it is not surprising that our study reveals that voters think this referendum is the most important vote in a generation, and by a considerable way.

Voters have been subjected to statistics, slogans and arguments from both camps as they try and convince the nation what is in their best interest on June 23rd and our in-depth study provides a thorough and complete academic review into the public's hearts and minds and how the result of this unique moment in time will affect the behaviours and attitudes of British households for years to come.

We hope that this research provides crucial insight for businesses and key opinion leaders as they gear up and prepare for the 24th of June and beyond.

*Fieldwork 31st May – 3rd June



Foreword

James Dowling, Head of Public Policy at Lansons

It is a huge pleasure to collaborate once again with our friends at Opinium and the London School of Economics. This marks the third time that Lansons have partnered with LSE and Opinium; two weeks before polling day, this report comes at a crucial time in the debate.

This is a remarkably thorough report, offering a far deeper analysis of the electorate than anything we have seen before. Lansons specialises in helping our clients navigate key reputational and public policy risks.

The referendum on the UK's membership of the EU is key to the businesses of our clients. We are therefore very happy to support this study.

The picture painted here is one of an electorate that is fundamentally split along generational and geographic lines. Those supporting Brexit, in particular, come across strikingly different from the wider electorate. Generally over 40 and living outside London (particularly in the Midlands), they are defined by their concern for immigration. Curiously, they do not necessarily believe the claims that we will be no worse off after Brexit, or better able to control immigration. However, they want to leave the EU anyway. By contrast, those who want us to stay in the EU tend to be younger and more likely to live in London. They are far more likely to be swayed by the economic case for remaining in the EU.

With the polls tightening, the undecideds are likely to swing the vote one way or another. The evidence is that more undecided people are likely to be risk averse and decide on economic lines. Immigration clearly remains the strongest card available to the Brexit camp – it is understandable that they are pushing it. However, the evidence is that the majority of people (even their own supporters) think they are overplaying it. To secure victory, the Brexit campaign needs to address the economic question convincingly.

Interestingly, despite the differences across the electorate, all voters tend to think more of the wider community rather than themselves in voting – with the older generation thinking particularly of the interests of the young. As many other areas of policy, this raises the prospect of a huge rift between the generations, with the older generation voting out ‘in the interests’ of the young – despite the young themselves not agreeing with them.



Background

Visiting the heart and mind of a referendum voter - by Professor Michael Bruter, Director of the ECREP initiative

From 2010 to 2015, the ECREP@LSE electoral psychology team has explored the psychology of voters to give us an unprecedented understanding of what goes on in citizens' minds when they cast their vote. We look at the way emotions affect the way we vote, the weights of personality and memories on our electoral decisions, who and what we think of when we are in the polling booth, or even how apparently innocent aspects of how elections are organised – such as the use of postal voting or what a ballot paper looks like – affect our decisions. We also delve into the way people feel that a vote result will affect their future and those of their loved ones, and society as a whole, and how they change their own behaviour to adapt to those expected consequences. This research has earned us the Market Research Society Award for Best International Research, jointly with our long term partners from Opinium Research.

There is a lot that we are told that we know about voters, and how their interests, their backgrounds, and their stances towards issues will determine the way that they vote in any election in general and the forthcoming referendum in particular. For all practical purposes, all of it misses the point. There is indeed something “special” about the moment when we cast our vote, which often makes individuals tick a box that they did not expect to, and sometimes vote in a way that they could not genuinely explain themselves. This produces unpredicted election results such as the straightforward Conservative victory in the May 2015 General Election, which no poll had – nor could have - predicted.


In every election, between 20 and 30% of voters either make up or change their minds within a week of the vote, half of them on Election Day.

This proportion can even be much higher: in a referendum on children's rights that took place in Ireland in 2012, 80% of voters decided how to vote in that crucial final week, and it is in part for that reason that our innovative research in electoral psychology tells a story that has been largely ignored, and is yet crucial to our understanding of democracy.



Our project, entitled “Inside the Mind of a Voter”, and financed by the European Research Council has been highly successful, and uses a whole range of cutting edge and unique initiatives, which we hope will continue to provide unprecedented and practical insights into the way human beings behave. We film the shadow of voters in the polling booth and analyse the emotions that their facial expressions and body language display; we model the impact of introducing internet voting on citizens’ satisfaction, their electoral choice, and their long term turnout; we pilot initiatives to make young voters’ first electoral experience a special moment, which they will enjoy and remember for life; we ask people to keep election diaries to understand the critical junctures and messages that shape their minds. Crucially, we go to great lengths to go beyond what citizens tell us and unravel patterns of thinking and behaviour that they may not even be aware of themselves, and which prove, as a result, all the more powerful.

In the context of the Referendum on the United Kingdom’s membership of the European Union on 23 June 2016, Opinium and ECREP have teamed up again, in collaboration with our long term partner Lansons. We have put together a unique panel study intended to explore what will go through the minds of the British people when they vote in this momentous Referendum. We want to understand what will likely tip each of them to decide in favour of remaining in or leaving the European Union, what main hopes and fears they associate with the two possible outcomes, and crucially, how they project the consequences of the Referendum results, as well as on their own consumer and social behaviour in the years that will follow the vote.



None of those important questions have been explored by the abundant media and opinion coverage of the referendum to date, in part because they mirror our unique analytical models and use the techniques that the ECREP team has systematically developed over the past 6 years, and in part because the report that we are presenting to you today is based on 300 different items, two waves when we surveyed the same people, and over 3,000 respondents, which is a far more ambitious research design than any commercial initiative.

Some of the elements of the story recounted by this report will come as a surprise, such as the fact that despite voters saying otherwise, support for European Union membership is in fact highly emotional, the notion that young Brits already really live like Europeans and are not willing to give up on the right to live anywhere in the EU or vote in European Parliament elections, or indeed how most people voting on 23 June, most of whom will really be thinking of what country they want for their children, are already preparing to modify their housing, banking, holiday, or even family plans according to the result that will be announced later that night. We hope that you find these insights intriguing and interesting.



*Our project is supported by two grants from the European Research Council, an independent scientific organisation. Projects are selected competitively by panels solely made of independent scholars, and the Council has no control over the research being conducted. However, to avoid any conflict of interest, we chose not to use any European Research Council money for the specific part of the research conducted on the EU Membership referendum, which findings are presented in this report. The data collection and consolidation have been fully funded by Opinium Research and the analysis conducted by Prof. Bruter and Dr Harrison in their personal time.



Outline

What is this report about?

This report aims to understand the psychology of the EU membership referendum vote amongst the British public. It uses a mixture of questions and models that have been tried and tested in our electoral psychology project, and others which have been created specifically with a view to understand voters' behaviour in this very unique referendum and how its outcome will affect the behaviour of British households in years to come.

The first category includes such things as an understanding of the memories and emotions which affect people's vote, how their personality results in certain patterns of behaviour, and who people will think of when finalising their choice in the polling booth. The second type ranges from asking people to put a pound value on what they believe will be the effect of the referendum outcome on average wealth in years to come, predicting their future consumption under the two possible post-referendum scenarios, and asking which aspects of EU membership they would miss if the UK left the Union.

Altogether, this report comprises of four sections:

- 1) What does this referendum mean in the eyes of voters and how do they view the campaign?
- 2) What electoral psychological processes will determine how people will vote on 23 June?
- 3) How do different types of British voters relate to the European Union?
- 4) How will the referendum outcome – whether remaining or leaving – affect the future social, economic, and consumer behaviour of British people in coming years?



Ten key findings


In this report, we have tried to understand what the referendum means to British citizens, what mechanisms will determine their individual vote, how different categories relate to the European Union, and how they expect the referendum outcome to influence their future social, economic, and consumer behaviour in years to come.

Here are a few of the key findings presented in this report:

1. The EU membership referendum is largely perceived as the most important vote in a generation (most important for 54% of respondents, and among the top three for 81%);
2. In terms of campaign arguments, the arguments put forward by the Leave camp meet with significantly higher scepticism than those put forward by the Remain camp, even amongst supporters of Brexit. Three of five key arguments of the Remain camp were predominantly seen as believable – notably the fear of a new Scottish independence referendum in case of Brexit and trust that if we stay, there will be a majority in Europe for a better and more effective EU which will thus improve things in coming years, whilst four of five key arguments of the Leave camp were seen as manipulative – notably, people do not believe that Brexit will reduce immigration, nor that the EU will offer the UK a new deal in case of a vote for leaving;
3. The most important argument of the Brexit camp is largely perceived to be the fight against immigration. Opinions are far more split on remain camp arguments, with access to the world's largest market, the fact that we are European, and the EU enabling Britain to be stronger and punch above its weight being supported by almost equal proportions of voters;
4. When it comes to spontaneous associations with the ideas of “leaving the EU” or “remaining part of it”, the results are contrasted between the two outcomes. Brexiting results in a mixed bag of negative visions (Fear, Uncertainty, Danger, or even Catastrophe) and a positive hope for Freedom. By contrast, the prospect of remaining evokes more globally positive words – Reassurance, Safety, Security, Unity, and even Happiness;



5. Consistently with the persistent findings of our electoral psychology research, we find that people's vote in the referendum will be more sociotropic than egocentric, as well as projective. Voters are more interested in what is best for the British people as a whole and particularly the generation of today's children than themselves;
6. British voters are actually overwhelmingly happy to be in a Union with most European countries from Ireland to France and even from Germany to Poland, Belgium, and Spain, and in practice, the difference between Brexainers and Brexeters essentially pertains to disagreements on whether or not to be in a Union with Romania and some possible future Member States such as Ukraine;
7. How much will British households gain or lose depending on the referendum outcome? If you ask 18-24 year olds, every household will be £9 better off on average if we remain members of the EU, but £155 worse off if we leave. By contrast 65+ year old's believe that we would be £239 a year worse off if we remain, although they also believe that we will be £6 worse off to if we leave. While people favouring a Remain vote predictably believe that we would gain from remaining and lose out from leaving and people favouring a Leave vote the contrary, it is interesting to note that those unsure of their vote are much closer to the position of Brexainers than that of Brexeters and believe that we would be much worse off by leaving than we would if we stayed in;

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8. Everyone would miss something about EU membership, but different generations would miss different aspects. For the under 40s, it is mostly the core EU citizenship rights, such as the rights to live (86%), work (77%), or study anywhere in the EU, being part of a European human and political community (76%) and the European passport (77%). By contrast, those over 55 would mostly miss more specific aspects such as being medically protected all over the EU (66%), benefiting from EU consumer protection (57%) or being able to bring back anything that they wish from anywhere in the European Union (52%). It is worth noting that the answers of those undecided about how to vote in June are much closer to those of Remainers than those of Brexiters on this question;
 9. What will be the impact of the June referendum outcome on future consumer behaviour? First of all, the referendum itself has produced uncertainty which tends to result in negative consumer behaviour prospects regardless of the outcome. Nevertheless, the expected negative effect seems to be significantly stronger should the UK decide to leave the EU. This would result in much worse prospects in terms of life choices, housing, investment, consumption, and holiday plans. By contrast, a Brexit would lead to higher prospects of taking out personal loans, changing banks, and going out for meals. There is no significant difference when it comes to savings or insurantal behaviour;
 10. Everything about the June referendum highlights a clash between generations. Those under 40 and those above have entirely different outlooks on whether to remain in the EU or leave, what will be the impact of the vote on the country and on their own behaviour. The young expect to be particularly affected in case the UK decides to leave the EU. There are also strong regional differences with the biggest contrast being between the very pro-European greater London and the very Eurosceptic Midlands and Eastern England. Northern Ireland and Scotland are decidedly siding with the Remain camp too.

1

Bremain or Brexit?



The referendum and the campaign in the eyes of British voters

We have possibly never had a vote like this one, apart, perhaps, from the 2014 Scottish referendum.

Elections determine the future of a community for the following few years, but there is something about referenda which is more definitive. It makes them more critical and momentous than most other votes, at least when the stakes are – as is clearly the case in the EU membership referendum – significant and to some extent mysterious. The vote is seen as all the more important than its outcome remains unclear till the very end.

Using our comparative electoral psychology findings, we expect this to be even more the case in the UK, as the country has such a limited history of referendum voting compared to Switzerland, Ireland, California or even France.

In this first section, we try to understand how the British public perceives this unique democratic occasion, but also the campaign that is being run by the Remain and Leave sides, and the real stakes of the vote.

The most important vote in a generation

The most important vote for our nation	Ranked top	In the top 3
The 2016 EU Referendum	54%	81%
The 2015 General Election	13%	58%
The 1975 EEC Referendum	12%	50%
The 2014 Scottish Independence Referendum	9%	48%
The 2016 Local Elections	7%	31%
The 2011 Referendum on the electoral system	5%	31%



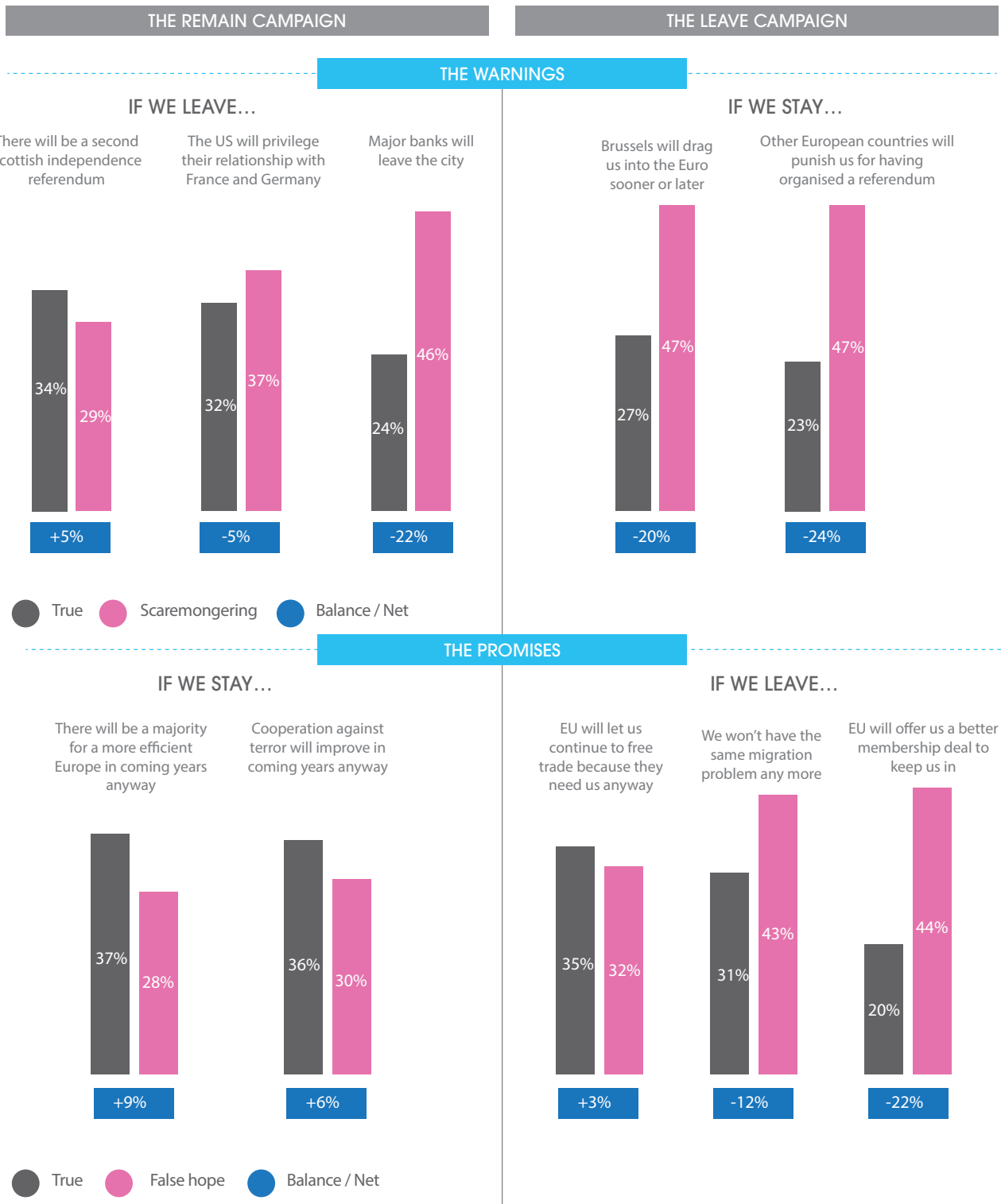
We asked respondents to rank some recent votes from most to least important for the United Kingdom. By and large a vast majority see the June referendum on EU membership as the single most important vote for the UK in a generation (54%). Over 80% see it as one of the top three votes of recent years.

This question directly relates to a crucial aspect of our electoral psychology research which is the understanding of voters' electoral memory and its implications. We find that while people do not remember well how they vote in elections, they do remember a lot about elections themselves, including the atmosphere of the polling station, family discussions or disputes, or even the tension and excitement that surround them. In many ways, we could say that from the point of view of citizens, elections are one of those events where it is not the winning that matters but the taking part. We consistently find that it is particularly so in what we call major realignment elections which shape citizens' electoral memory, behaviour and perceptions of democracy for years to come. It seems that this referendum is likely to become one of the most iconic votes in the UK from that point of view.

The EU Referendum campaign: genuine arguments or manipulation?

One particularly interesting aspect of our findings is that whilst our sample is virtually equally split between supporters of the Remain and leave camps, on the whole, the pro-remain arguments are perceived as much more genuine than the pro-leave ones. There are several ways of interpreting this finding, but the one most overwhelmingly supported by evidence is that a large proportion of leave voters are actually expressing a visceral and emotional rejection of the EU in full belief that leaving may well come at some very direct cost. In other words, many do not necessarily believe the claims of the pro-exit camp but want out anyway, apart from the fact that the risk will be mitigated by the fact that the rest of Europe "needs us", which they perceive as a good reason to hope that free-trading will continue anyway.

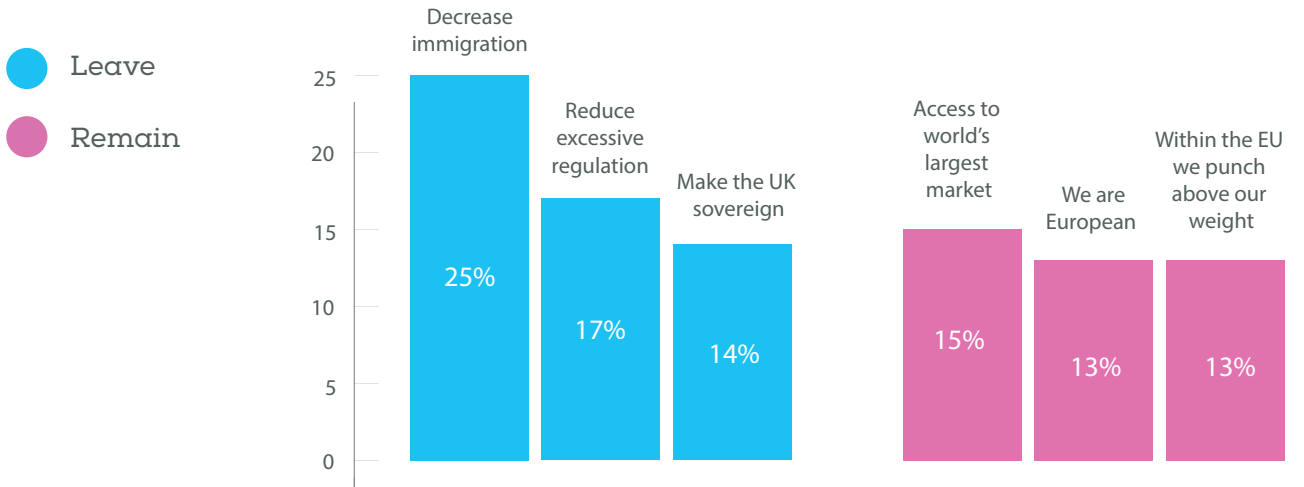
It is also noteworthy that in particular the argument made by part of the leave camp that voting to leave would put the UK in a stronger position to negotiate a better deal is overwhelmingly rejected by voters.



Many Leave supporters in fact even deem many of the Remain claims credible as do most supporters of a remain vote, except for the risk of major banks fleeing the city which most voters do not believe.

However, regional differences matter there, and Londoners are significantly more worried about banks leaving the City than the rest of the country.

Most convincing arguments about leaving and remaining in the EU



	Leave	Remain
Top 18-29	Reduce excessive regulation	Within the EU we punch above our weight
To 70+	Decrease immigration	Together we can better fight terrorism

Looking at what is perceived to be the most convincing arguments of both sides is interesting in that it enables us to better understand the strengths and weaknesses of the two camps and to an extent, the motivations of their voters.

The leave camp can be summarised in a simple thought: a wish to contain or reduce immigration. This is followed – in quite a distance – by a hope to reduce regulation. By contrast, the Remain camp is seen as having three almost equal strongest arguments: the access to the world’s largest market (probably the most expected high answer), but also the fact that we really “are” European and therefore belong, as well as the fact that as a country, we punch above our weight when we are part of the EU.

The most interesting contrast here is that this means that pro-Brexit arguments are effectively more “technical” whilst two of the three main pro-remain arguments are in fact more political and almost ideological. The contrast is reinforced across generations, with older voters favouring technical arguments whilst younger voters largely favour political and ideological ones.

2

Inside the mind

Inside the mind of a referendum voter

As part of the Inside the Mind of a Voter project, we have had opportunities to closely study citizens' behaviour in referenda in the UK (2011), Scotland (2014), New Zealand, California and more. In that way, we have been able to establish the differences between referendum voting and traditional election voting from the point of view of electoral psychology. In particular, voters tend to have a much higher sense of what we call "external efficacy" in political science (ie the ability to affect political outcomes) and projected efficacy (an important concept that we coined, which corresponds to the feeling that we can influence outcomes if others vote like us) than in general elections.

This section presents some of the key aspects of what psychological mechanisms will play out on 23 June. In this report, as a sample of such effects, we introduce four key dimensions: how we can use spontaneous associations to better understand the subconscious perceptions of the referendum stakes, how citizens' perceive their role and responsibility as voters, our persistent finding that voting is a sociotropic rather than an egocentric affair, and an attempt to decipher how conflicting emotions will play out in the vote.



“Remain” and “Leave” in people’s own words

Top 10 word categories evoked by a “remain” and a “leave” outcome:



One of the first things that we asked our respondents was to tell us what the words of a “remain” or a “leave” outcome in June evoked to them spontaneously. These open ended questions are a unique way to assess the spontaneous reactions to the two possible referendum outcomes without leading respondents or pre-imposing any arbitrary category or connotation.

While both remain and leave outcomes attract a mixture of positive and negative spontaneous references, it is quite clear that leaving feels significantly more threatening to respondents as a whole with two of the top three categories being negative and focusing on fear and danger.

All of the negative elements associated with leaving pertain either to the future state of the countries (risk, disaster, chaos, conflict, etc) or, implicitly feel like a criticism of the leave voters (branded stupid and foolish). By contrast, negatives associated with remaining pertain to a perceived current issue (immigration) or negativity towards the country elites perceived as pro-European and accused of being manipulative and untrustworthy.

It should also be noted that on the whole, references are far more positive when it comes to the referendum than what we found when asking for similar spontaneous associations in the context of UK General elections in 2010 and 2015 as well as the 2011 electoral systems referendum.

In terms of the positive, it should be noted that when it comes to the remain camp, references to the community are actually stronger than more “technical” benefits, and indeed, references to unity, being part of a community, strength, and solidarity are in fact significantly higher than references to prosperity, wealth, etc. which do not make it into the top 10.

Referees or Supporters?

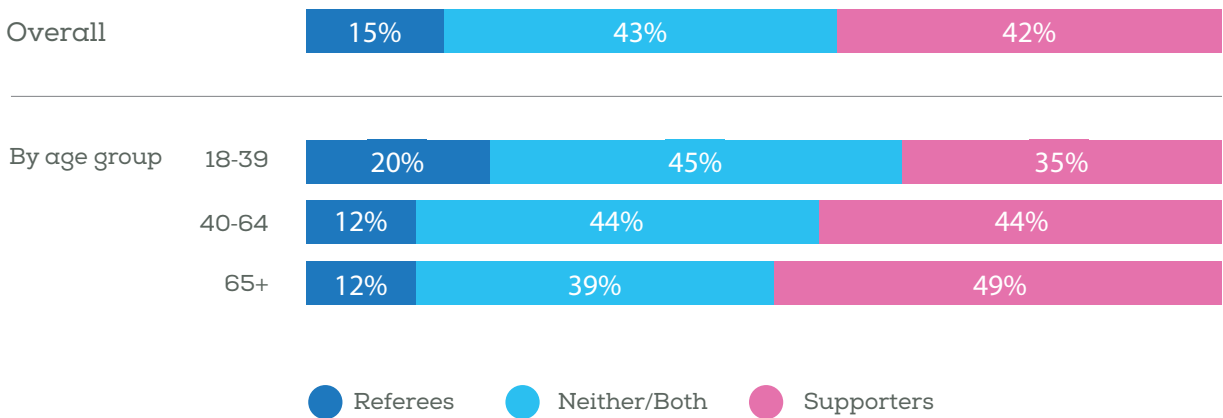
One of the signature models of our “Inside the Mind of a Voter” project has been to show that in the context of any vote that we portray as the final of a sporting event and where we conceive the different camps as “players”, some voters see their own role as that of “referees”, whose task is to weigh the different arguments to find a winner, whilst others see themselves as “supporters” who rally behind one of the teams.

In the context of this referendum, we can see that a majority of voters consider themselves “supporters” rather than “referees”, particularly as voters age. What is particularly noteworthy in this context is that our electoral psychology study has found that this situation is opposite to general elections, whereby a majority of voters see themselves as referees (although there again, the proportion of referee declines with age). What this means is that voters are typically far more opinionated as to whether we should be “in” or “out” of the EU compared to their stance towards political parties competing for their vote.

At the same time, however, we should also note that even more than in traditional elections, respondents demonstrate a clear perception that a responsibility is weighing on their shoulders.

It is notably expressed when we asked them about their main fear in the context of the vote using an open-ended question, and a very significant proportion of the people whom we surveyed replied that they were very worried about making the wrong decision. Based on our evidence from the study of past elections and referenda, we expect this acute sense of responsibility to play a significant role in people’s final choice. Indeed, we consistently find that 20-30% of voters either change or make up their minds about how to vote within a week of casting their ballot, about half of them on Election Day itself. In the context of perceptions of high responsibility, this would typically disfavour any outcome that would be perceived as epidemic or unwise. Marginally, this could also have an impact on some voters preferring not to take the responsibility to vote if they are worried about the basis of their own opinion.

Most voters see themselves as “supporters” of one of the two camps rather than “referees” in this campaign



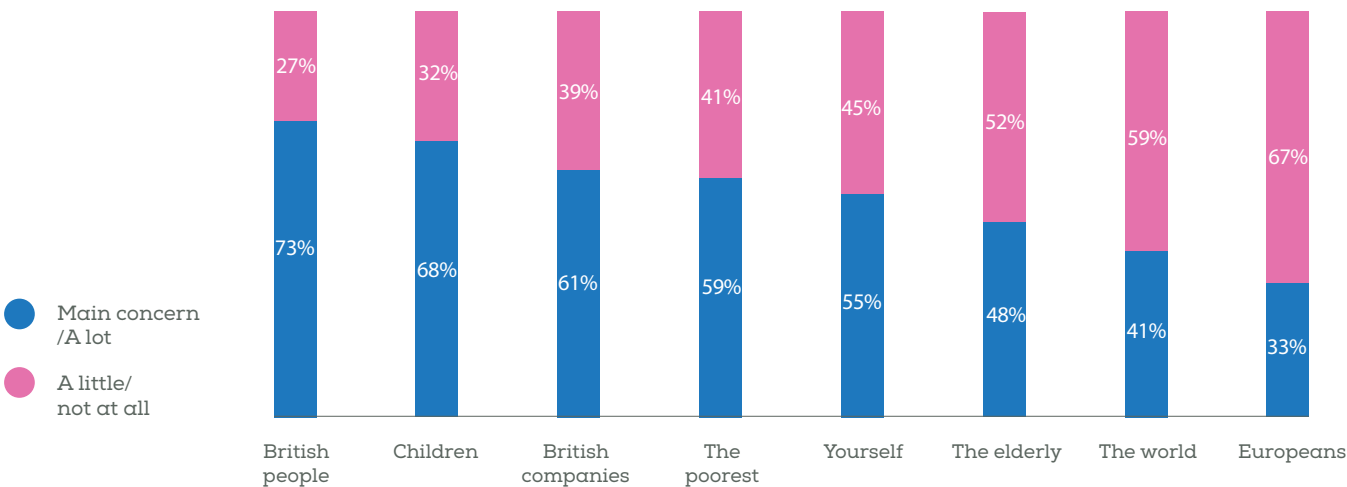
Referees represent the total of “mostly” and “definitely” a referee, Supporters the total of “mostly” and “definitely” a supporter and the Neither/Both total the total of those who answered “neither” and “a bit of both”.

Whose interest do people have in mind when voting in the Referendum?

Another key aspect of our electoral psychology research has been to show that a vast majority of voters tend to be “sociotropic” rather than “egocentric” in their choices that is, when needing to arbitrate between voting for what they believe will be best for them and what will be best for the country, the latter clearly takes precedence.

Our research shows that voting in the forthcoming referendum on British membership of the EU follows a similar pattern with sociotropic considerations mattering far more than egocentric ones. This is true both when we ask the question directly (as above) and when we measure it indirectly by checking which of the perceived best result for the individual or the perceived best result for the country is the best predictor of a respondent’s voting intention.

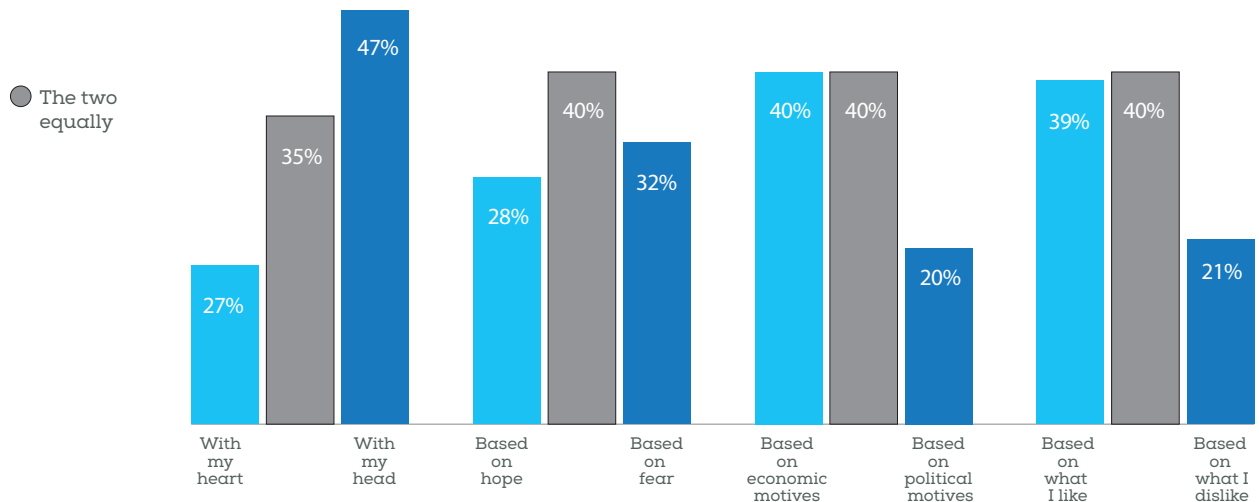
Overall, 73% claim to think of what is best for the British people in general and only 55% of what is best for themselves.



Our results also show that voting in the EU referendum is largely projective and in particular, that voters give greater emphasis to the generation of today’s children than to their own or the elderly (68% for the generation of today’s children and only 48% for the elderly). This should be taken in conjunction with the question (analysed later in this report) where we assess which outcome people think would be more favourable to the main groups within British society, which shows that they tend to think that remaining in the EU is typically better for younger people than for older ones, whilst leaving is typically a more favourable outcome for older citizens than for young people.

How will people vote on 23 June?

We asked respondents a series of questions pertaining to how they intend to make up their mind about the future of the UK in the European Union on 23 June. The clear picture emerging suggests that people like to describe their choice as far more positive than negative and far more pragmatic than emotional. We should also stress that hope and fear play almost exactly equal role in voters' self-perceived motivations.



How will you decide how to cast your vote?

Among the differences between supporters of a Leave and a Remain vote, one of the most interesting has to do with the positive nature of the voting decision. While people supporting Brexit are driven almost equally by what they like and dislike (37% vs 31% with 32% claiming to be driven by both equally) supporters of a remain vote appear significantly more positive, with 48% of them saying that they will vote on the basis of what they like and only 13% on the basis of what they dislike (39% both equally).

It is however also important to draw attention to the contrast between some of the voters' conscious descriptions of the nature of their decision-making and the way we could observe their subconscious attitude towards the vote based on the unprompted open ended questions. While the positivity of the vote is indeed confirmed across both cases, we find that voters' claims to cold rationality might be over-stated and that the emotional component of their vote is far more significant than they care to admit.

In particular, responses to a future in or out of the European Union seem to be at least as shaped by the heart as by people's minds, and in terms of open ended references, economic motivations effectively seem to come much lower than political ones down the list of key factors, and that for supporters of both the Remain and the Leave camps.

3

Perceptions and identity

Referendum voters and the EU

Another constant aspect of our research is a focus on citizens' identity and how it influences their political behaviour, notably in the context of Europe. When it comes to the referendum, this question is of course critical because the choice to remain in the European Union or leave it is intimately intertwined with the question of what it means to be a European citizen, and what the European Union itself represents.

Using our insights from previous research, we included a number of questions aimed at capturing the levels of civic and cultural European identity of various sub-types of British people. This will give us a sense of the meaning of the vote to come as well as the fracture lines likely to divide the British public in terms of the impact of the referendum vote on redefining who we are and want to be as a nation.

As examples of such measures, we include some insights on the images that various types of citizens associate with the EU, the ideal geographical contour of who we should and should not be in a Union with according to various types of voters, and citizens' comparative trust in national and European institutions.







Images of the European Union...

We asked respondents to tell us what the EU would be if it were one of Snow White’s seven dwarves, a film hero, or a popular song.

In terms of the seven dwarves, many pro and anti-EU sympathisers alike seem to be particularly keen on Dopey, although pro-remain voters actually choose Happy as their no1 choice. However, beyond Dopey, interesting regional differences appear with London and Northern Ireland attracting more answers of Happy and Doc, while Northern England and the Midlands tend to answer Grumpy and Sleepy.

If the EU was one of Snow White’s Seven Dwarves

	Top choice	Second choice
London	 DOPEY	HAPPY 
Northern ireland		HAPPY 
Rest of England		 GRUMPY
Scotland		
Wales		

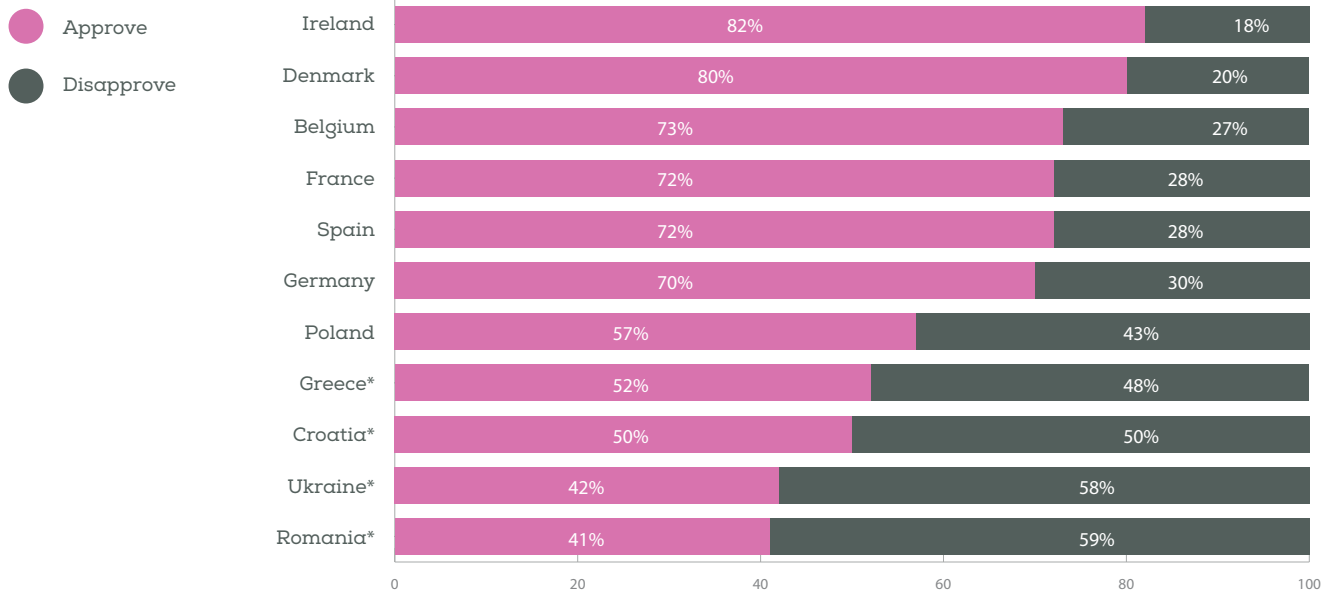
Contrasts are even far stronger for the other two questions. Those favourable to Britain remaining in the European Union believe that the EU best compares to James Bond, whilst those who favour an exit prefer to compare it to the mean character of “the Joker”. Those who are unsure use Mr Bean (awkward but likeable?) as their main point of reference.

If the EU was movie character or a song

If the EU was....	Bremainers	Unsure	Brexiter	Overall
A song	Imagine	Imagine	Ironic	Imagine
	We are the Champions	Ironic	Don’t Speak	Ironic
A movie hero	James Bond	Mr Bean	The Joker	Mr Bean
	Mr Bean	The Joker	Mr Bean	The Joker

Similarly when it comes to songs, people favouring a vote to remain think that the EU evokes them John Lennon’s Imagine. By contrast, people favouring Brexit choose Alanis Morrissette’s Ironic as their utmost EU reference. It is interesting to see that people unsure about their vote have answers that typically seem closer to those of Remainers rather than leavers when it comes to these implicit measures.

The countries we want to be in a community with...



For Greece, Croatia, Ukraine, and Romania, there is majority support for all categories under 40 years of age, and majority rejection for all categories over 40. All other countries have clear majorities of support for all age categories.

While the June referendum will question whether people want to remain part of a Union of 28 Member States, it is clear that people's enthusiasm or scepticism might be more directly targeted at some countries compared to others. In one question, we therefore asked respondents to tell us to what extent they approved of being part of a community with a range of current and possible future member states.

The findings are interesting in the sense that we found that in a vast majority of cases, supporters of a Remain and Leave vote alike are actually in favour of existing ties. This is overwhelmingly true of all the old Member States of the EU (Ireland, Denmark, Belgium, France, Spain, Germany, etc) and even to a lesser extent of both Greece and Poland, which are both a recent entrant into the European club (2004) and the largest population of EU residents in the UK.

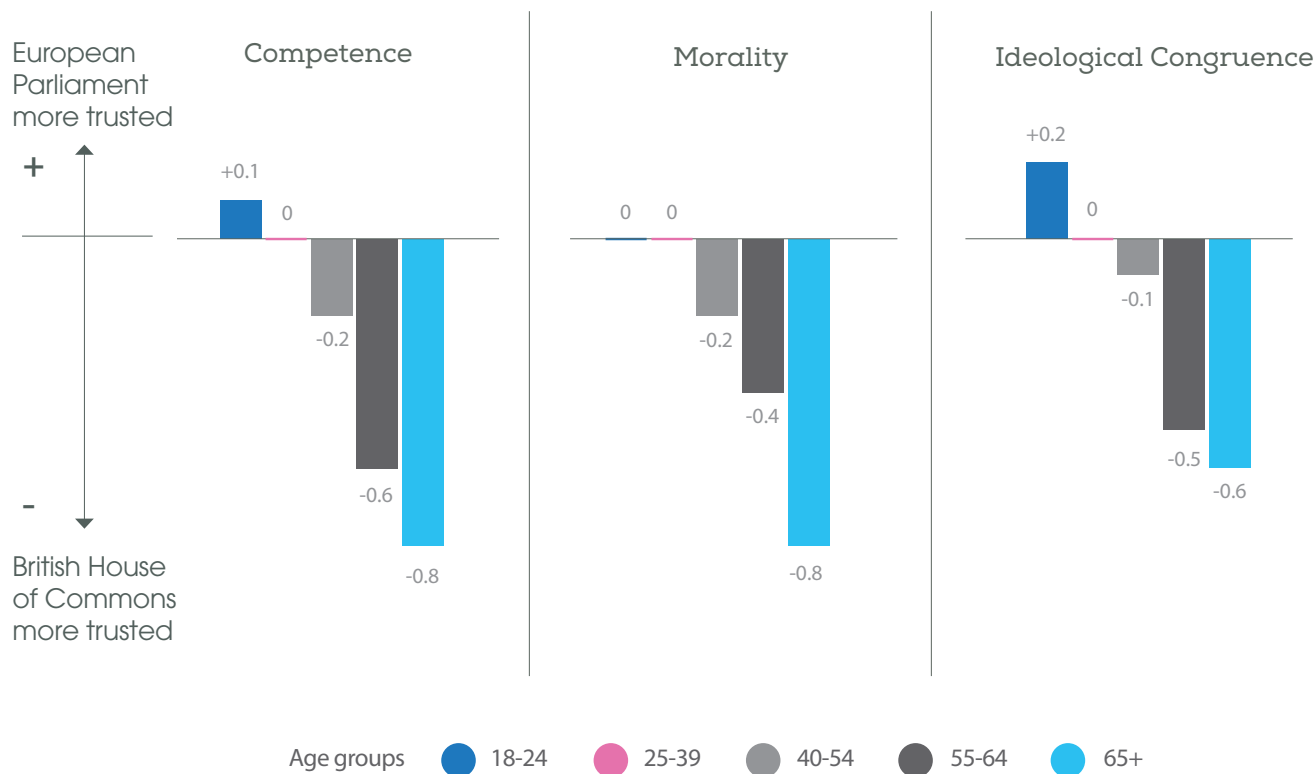
In fact, the difference between Remain and Leave camps solely seems to pertain to a very small number of current and possible future candidates such as Romania and Ukraine. In both cases, a majority are against membership of the same Union, although also in both cases, this transforms into clear majorities in favour among those aged 40 years and under.

Trust and distrust in Westminster and the European Parliament

On the whole, voters tend to distrust the British and European Parliaments alike. However, it should be noted that for young voters, the European Parliament is in fact more trusted than the House of Commons while 25-39 year old's consider the two Parliaments almost completely equal in terms of trustworthiness.

The main deficit of the European Parliament comes from a perceived comparative lack of competence, whilst morality and congruence with their own ideology are seen in a more positive light.

Most age groups think the European Parliament is less competent or moral than the British House of Commons



Positive results mean that trust in the European Parliament is higher than in Westminster, and negative results that trust in Westminster is higher.

A stylized illustration of a grey stick figure standing on a grey arrow pointing to the right. The figure is holding a large blue circle above its head. Inside the circle is the number '4' in a grey circle, and below it, the text 'Consequences and implications' in white.

Consequences and implications

Life after 23 June

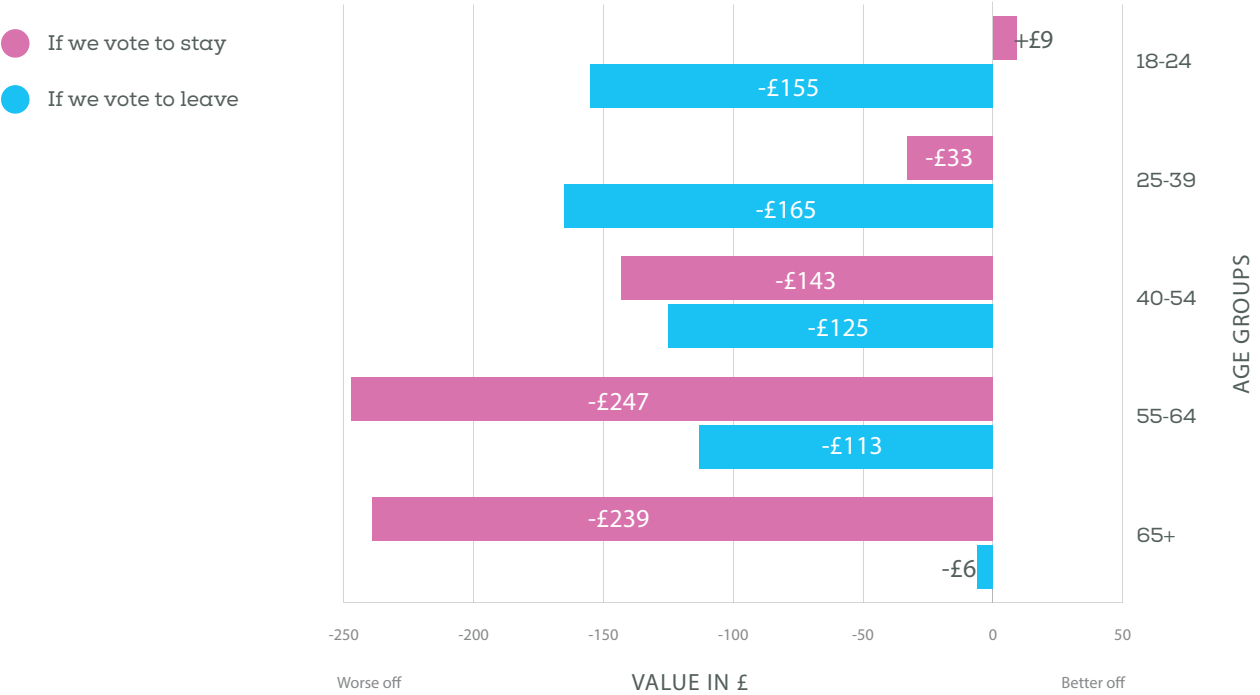
In the final section of this report, we focus on what is perhaps one of the most original aspects of our study: understanding how the result of the referendum will affect their future economic, social, political, and consumer behaviour in years to come using a mixture of explicit and implicit questions.

There have been scores of expert studies on how leaving the European Union would affect the economy, trade, regulations, unemployment, and growth, but paradoxically, they all fail to directly investigate how citizens believe that their own behaviour will be affected, preferring to assume (generally constant) behaviour. Economists and political scientists alike are critically conscious that such an assumption is simply wrong, and also that human behaviour is the single most important influence on economic outlook. Our study aims at replacing what is therefore an explicitly incorrect assumption by a credible evaluation of how the behaviour of British people is and will be affected by both the uncertainty created by the current referendum and its two possible outcomes.

In order to paint the most accurate portrait possible, we principally focus on four key aspects of people's projection into the post-23 June future: their intuitive perceptions of the impact of the vote on household's future income – something which we know to be effectively a better predictor of consumption behaviour than actual income evolution, a sense of what they would or would not miss about the European Union should the UK decide to leave, their perceptions of who would be the winners and losers of a hypothetical Brexit vote, and finally, their prediction as to how a Remain or Leave outcome will affect their future behaviour in terms of life choice, housing, banking and money, insurance, consumption, and entertainment and lifestyle.

We ask people to project themselves on the basis of two key timescales: 5 and 20 years from now.

How much better or worse off will British households be as a result of the referendum vote?



How the generations think British households will be affected in the next 5 years

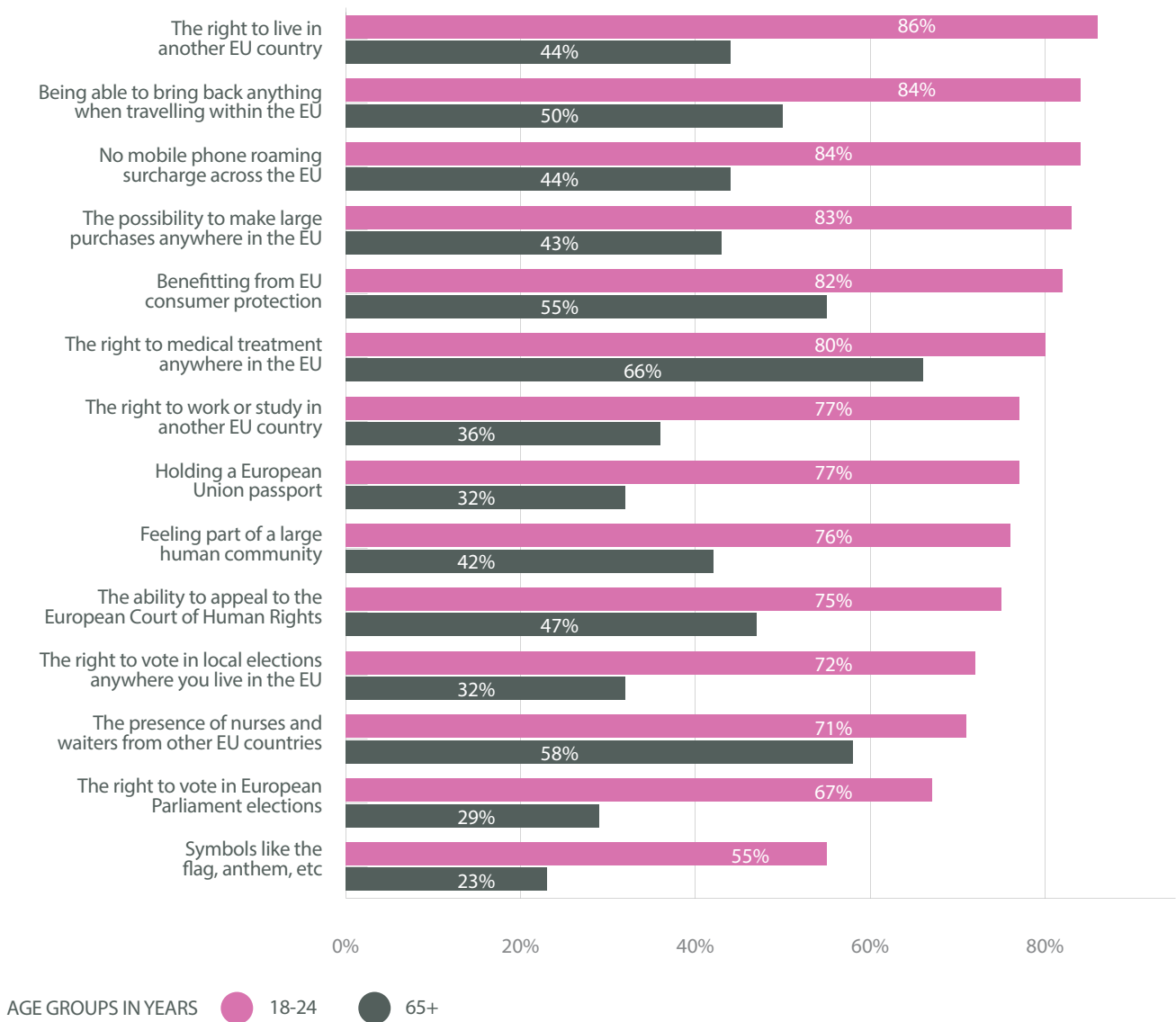
	If we remain		If we leave	
	In 5 years	In 20 years	In 5 years	In 20 years
Bremainers	£154	£271	£502	£429
Unsure	£110	£79	£181	£92
Brexiters	£406	£467	£247	£447

We asked voters to put an actual pound value on the potential gains or costs of voting to leave or remain in the European Union in months to come.

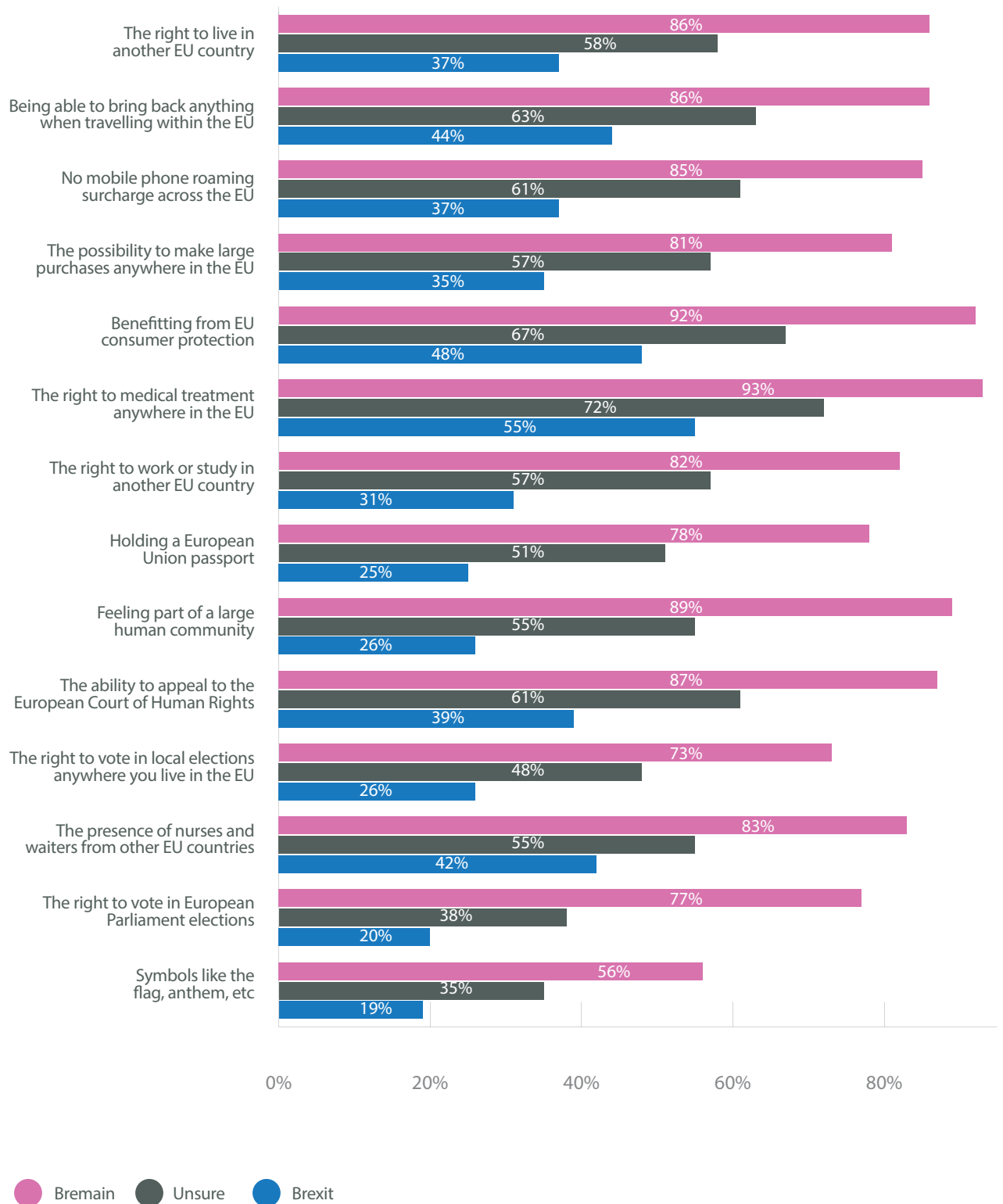
It is unsurprising that people favouring a remain vote believe that British households will be better off as a result of it, whilst people favouring a Brexit believe that leaving would make British voters better off instead. However, it is even more interesting to look at the evaluations of people who are unsure about their votes. As it happens, people who are still a bit unsure about their vote tend to have negative expectations regardless of the outcome, but also expectations that are effectively closer to those supporting a “remain” vote rather than a leave one, which may suggest that their profiles are in fact far more similar to those of remain voters than leave ones.


Another way of looking at the results is in terms of proportions of people who believe that British households would be financially worse off as a result of a Remain or Leave vote. Overall, the proportion of respondents who would think that British households would be worse off as a result of Brexit is 5 points higher than in the case of a vote to remain. Amongst voters undecided about their vote in June, that difference increases to 8 points, highlighting the higher perceived financial risk of leaving compared to remaining in the EU.

What people would miss about the EU?



And by expected vote:





One of the critical aspects of the vote on Britain's membership of the European Union from the point of view of our research is that the decision to be made sits at the intersection between electoral psychology and identity. As part of our research, and based on fieldwork jointly carried out with Opinium, the ECREP team has shown that in people's hearts and minds, European identity is largely focused on a daily practice of citizenship rather than more abstract attributes of European integration. While many politicians speak of peace (positive) or bureaucracy (negative), prosperity (positive) or inefficiencies (negative), the vast majority of citizens see the European Union through the rights and duties that it gives them and the way in which it changes their everyday life.

In that spirit we asked respondents which aspects of being European citizens they would or would not miss if Britain chose to leave the European Union in June.

The most interesting aspect of this question is that it reveals two different layers of rights and privileges:

- **A series of secondary citizenship rights, typically more social or practical (medical coverage, consumer protection, right to freely carry goods within the EU, etc) and largely missed across generations;**
- **A series of more intense primary citizenship rights (living, working, or studying anywhere in the EU, being part of a political community, EU passport), which would be missed even more intensely by the young, but much less so by older voters.**

So for example, young people aged 18 to 39 place the highest emphasis on potentially missing the right to live anywhere in the EU, work or study anywhere in the EU, and three quarters of them would also miss having a European passport or being part of a unified human community of Europeans. However, less than half of those aged 55 and over would miss any of these aspects of EU membership.



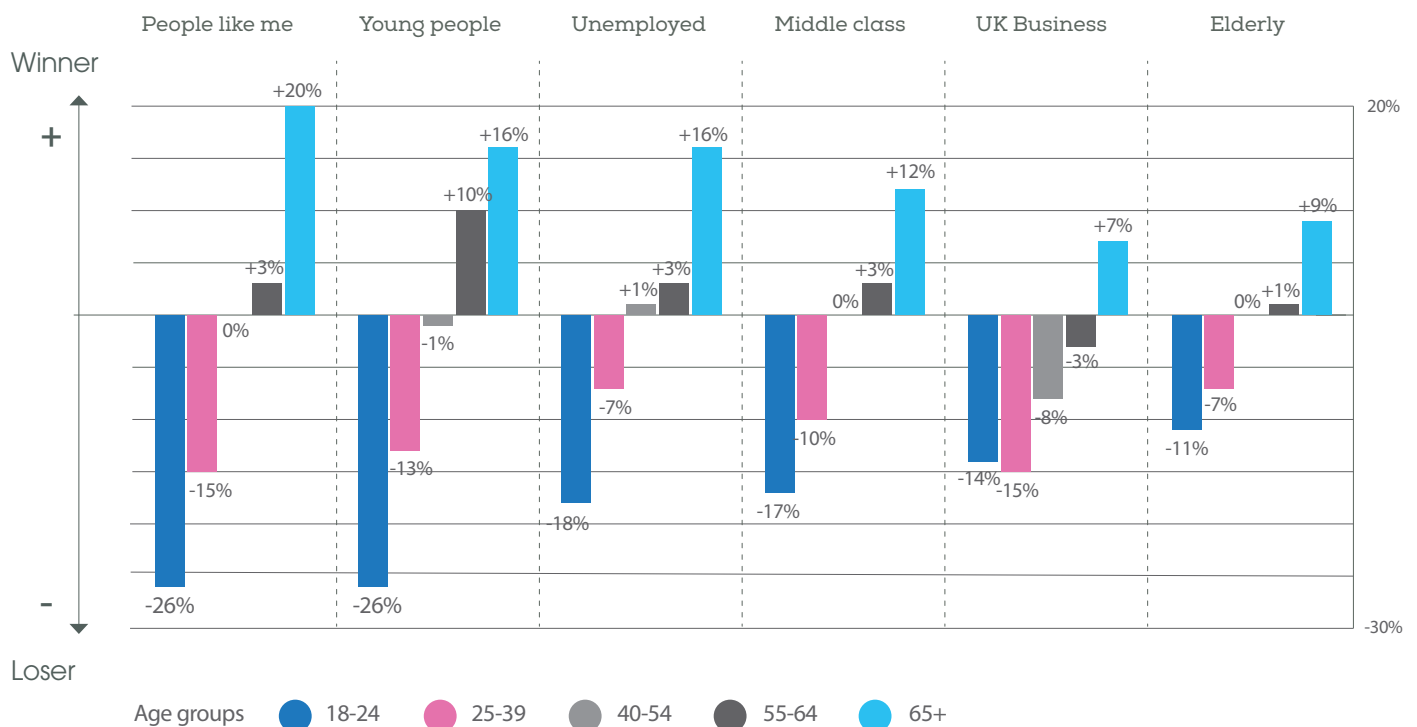
By contrast, while such elements as consumer protection, being able to bring back goods from anywhere in the EU, and medical protection across the EU territory are lesser concerns to the young, they would be missed by all generations. This is particularly true of EU-wide medical protection which would be missed by two thirds of the voters aged 55 and above. It is also worth mentioning that a majority of all age groups, including the oldest ones, would also miss the presence of waiters or nurses from all over the EU in their daily life, which is in interesting contrast with the generally negative views expressed towards immigration as a generic concept.

It is also interesting to note that when we disaggregate the results by intended vote, a majority of those who are unsure of how they will cast their ballot on 23 June would typically miss most existing EU citizenship rights at least to some extent, which seems to bring them closer to EU supporters on the value of existing EU-related rights.

Winners and losers in case of a Brexit

In terms of the losers and winners of a possible Brexit, quite unsurprisingly, respondents tend to rationalise their predictions with their expected vote, so that the most pro-remain generational group, 18-24 year old's tend to think that everybody would lose out in the case of a Brexit, whilst the most pro-Brexit demographic category, over 65 year old's believe that every category of British people would in fact be winners.

What is more paradoxical, however, is that when hierarchizing between categories, the more individual categories are seen by young voters as standing to lose from a Brexit outcome, the more it is claimed that they would gain from it by elderly voters. In that sense, for 18-24 year old's, the main losers would be – in that order – people like the respondent, young people, the unemployed, and the middle class, and these categories, in the exact same order would actually be the main beneficiaries of a Brexit vote according to 65 year old's and over.



Regional differences are also very significant with Londoners seeing every possible category as major losers, and the Midlands and East of England seeing them all as likely winners instead.

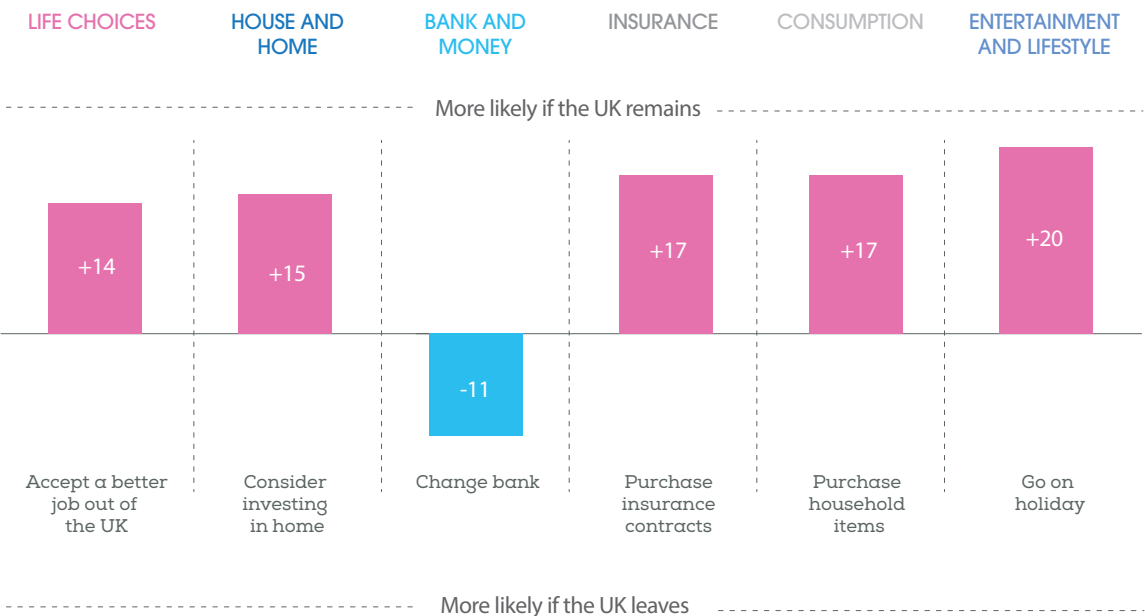
Future consumption and social and economic activities

A final aspect of our project was to understand how the outcome of the referendum on EU membership would likely affect British citizens' economic, social, and consumer behaviour in years to come. We therefore asked them how likely they would be to engage in a number of purchases and activities in years to come if Britain decided to remain a member of the European Union or, on the contrary, if the UK decided to break away from the EU and we compared the result.



We asked these questions using items that we categorised under six different headings: life choices (moving, creating a family, etc), house and home, bank and money, insurance, consumption (goods from cars to household appliances) and entertainment and lifestyle (going out, going on holidays, etc).

Case study: the 18-24 year olds



We analysed the results in all six categories both for the population in general and young people aged 18-24 in particular and the results, in both cases, point out to severe negative expectations in the case of a Brexit.

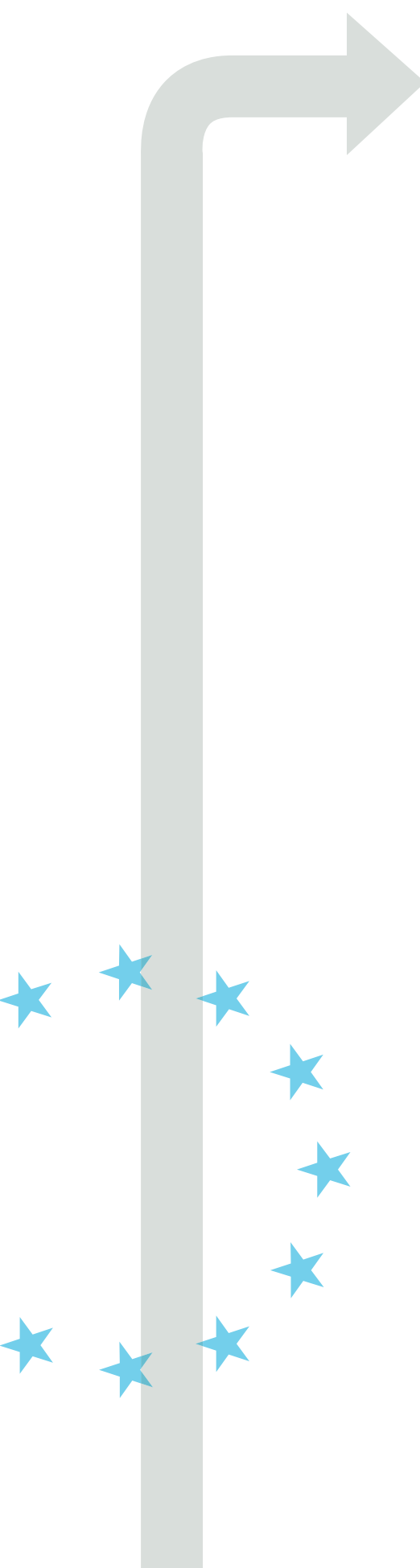
A first clear and overall finding is that on the whole, the uncertainty created by the Referendum seems to be affecting British people's perceived likelihood to engage in nearly any form of economic or social decision in and by itself. On the whole, mentioning the effect of the referendum on virtually anything leads people to answer that they are less likely to engage in activities requiring any level of trust or certainty including life changes, housing decisions, investment, and consumption, the only exceptions being risk-mitigating behaviour such as building up savings, the only other exception being a post-stress prospect of going on holiday. This may also betray the fact that the gloomier predictions of both camps have a more convincing ring to them than the positive prospects highlighted by supporters of the remain and leave camps alike.

A second general finding is that on the whole, leaving the European Union would lead to clearly more negative predictions of future behaviour by the population as a whole compared to staying in. Let us now go into details.



In terms of life choices, we find that overall, a Brexit vote would have a significantly inhibiting effect on people's likelihood to commit to prospective life changing choices. Apart from the prospect of changing jobs which would not be affected by the actual result in the referendum, we indeed find that voters in general and young voters in particular would be far less likely to make family plans or contemplate mobility particularly internationally in the context of a Brexit vote as compared to a vote to remain in the EU. Note that in both cases, the referendum itself and the uncertainty that it causes seems to have made voters claim to be far less likely to start or extend a family regardless of the result.

In terms of housing decisions, the picture is more contrasted with little difference made by the referendum outcome, and once again a sense of gross general negativity in terms of prospective behaviour. Moving home, whether to a cheaper or more expensive one seems to be deemed unlikely as is engaging in major housing repairs or upgrades, such as changing one's bathroom or kitchen. Note that a leave vote would make consumers apparently slightly more likely to move to a more expensive house, although this may be related to the traditional "safety" element associated with investing in bricks and mortar rather than financial securities. It should also be pointed out, however, that young people claim to be significantly more likely to invest in a home (+15 points) in case the UK decides to remain in the EU, with them being 7 points more likely to invest in home in case of a "remain" victory and 8 points less likely in case the majority choose to leave.



Insurantal behaviour is almost unaffected by the specific outcome of the referendum, but uncertainty seems to make consumers less likely to seek protection through insurance contracts (about 7 points of negative effect depending on the specific insurance product). Here, however, young people are the exception. Indeed, if a leave vote would make them 9 points less likely to purchase insurance contrasts, they would be 8 points more likely to do so instead in case of a vote to remain (+17 difference).

The future of banking and financial behaviour of British households is much more contrasted. First of all, people claim to be more likely to try and build up some savings as a result of the referendum itself and regardless of its outcome. A vote to leave would also make people more likely to take out a personal loan and also to change banks. This seems to be in direct consequence of a perceived uncertainty and financial fragility that would be expected to ensure from a Brexit vote. By contrast, people would be more likely (or more accurately, less unlikely as the current uncertainty is proving its inhibiting nature) to donate money to family members, invest in shares, in pension, or in foreign stock. Once again, young people prove to be the most widely affected by the consequences of the referendum results, with them being 11 points more likely to change banks in a case of Brexit.

Consumption itself would be unequivocally boosted by a vote to remain as compared to a vote to leave. Consumers would be significantly more likely to buy or change car, household items, and personal entertainment and electronic goods in the former case than in the latter (+1 to +3). This is particularly true of young people again, who would be 4% less likely to purchase household items if the UK leaves the EU but 13% more likely if the UK remains an EU member (+17).

Finally, in terms of entertainment, the picture is contrasted with a significantly greater likelihood to go on holiday in case of a vote to remain (+7) but slightly greater propensities to go out for meals or give to charities in the context of a Brexit (+1 to +2). The incidence on travel and holiday behaviour would be extremely significant amongst young people, who would be 5% less likely to travel in a case of Brexit but 15% more likely to do so in a case of re-confirmed EU membership (+20).

On the whole, we find that the referendum is already taking its toll on households' planned consumption and financial behaviour in years to come with uncertainty reducing their willingness to act in almost any way. Typically, part of that uncertainty would seem to resolve in the case of a remain vote, leading to greater commitment to life choices, consumption, investment, and holidaying while by contrast, a vote to leave would further accentuate expected negative economic behaviour of British households except in the context of savings, requiring personal loans, changing banks, and short term entertainment such as going out for meals.

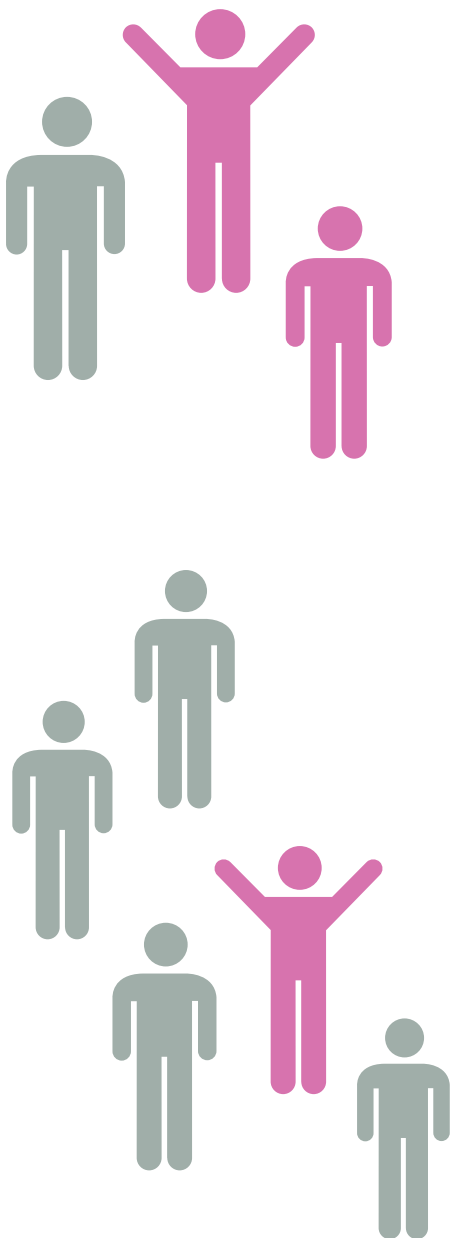
Notes on Methodology:

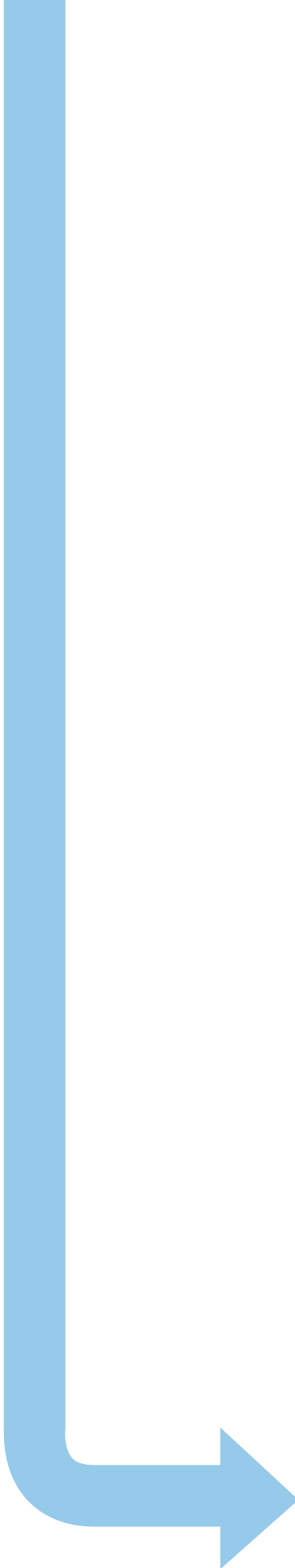
In order to carry out our original study, ECREP and Opinium have put together an exceptionally ambitious research design, informed by our electoral psychology project, which used a dozen different quantitative and qualitative methodologies in 25 different countries.

The first originality of our methodological approach is the use of a panel study which has allowed us to reinterview the very same people 22-28 April 2016 (3,008 respondents), and 17-19 May 2016 (2,111 respondents, ie 70.2% of the original sample), with a view to conduct a third and final wave on Referendum Night itself. This methodology is significantly superior to traditional time series surveys (whereby the same questions are asked to different people) because we can trace how specific type of individuals start thinking differently about the vote as Referendum Day approaches. It is also more complicated and more expensive to run which is why most commercial surveys do not invest in this “golden” methodology.

Secondly, we started our study with a very large nationally representative sample of 3,008 people, which is between 3 and 6 times more than most commercial surveys on the referendum. This increases the confidence that we can have in the results that we find, and even more importantly, increases our ability to try and draw comparisons about differences between specific groups (for instance age groups or regions) because surveys using smaller samples will, by definition, only have a handful of 18-24 year old respondents or Welsh respondents for instance, which makes comparisons based on age or region too fragile to generalise from.

Thirdly, our questions are very significantly different to all surveys on the Referendum that people will have seen in the media over the past few months. We mostly use three different types of questions:



- 
- Open ended questions: these questions are very rarely used in commercial surveys because they are extremely complex, expansive, and labour intensive to make sense of. Yet, they are exceptionally valuable because they are the only ones which do not impose pre-established categories to respondents, but instead start from their spontaneous answers and then work out to make sense of them. This is absolutely critical in the context of a vote which does not resemble anything else that this country has had to decide on for over 40 years and for which we simply cannot afford to completely rely on pre-established assumptions about what voters care about; “ by Yet, they are exceptionally valuable because they do not impose pre-established categories to respondents, and allow us to extract meaning from their spontaneous thoughts. This is absolutely critical in the context of a vote that is largely unique and unprecedented, and for which existing theoretical models would therefore be largely inadequate and possibly arbitrary;
 - Implicit measures: these measures that stem from psychology enable us to capture the subconscious side of voting in the referendum in a way that no explicit measure can do. In a nutshell, none of us knows the full story of why we vote for a given party in an election or answer in a referendum any more than any of us knows the full story of why we choose our partner or our friends. We believe that we can explain it, but others will often be aware of patterns in our choices that we ourselves tend to ignore. Implicit measures are ways to capture exactly these patterns;
 - Explicit questions about crucial and original issues: most surveys simply do not ask about what are voters’ main fears or hopes when it comes to what our country and themselves will experience after 23 June, nor the extent to which they believe that the interests of their children, their country and themselves might differ, or how they believe that they will change their banking, insurance, or consumption habits in the months that will follow the vote if the UK decides to leave the EU;

On the whole, our study relies on over 300 measures taken over three time periods with 3008 respondents. This is beyond the scope of literally any of the EU Membership Referendum studies that has or will be discussed in the media before or after the vote.



What people
think, feel and do.

About Opinium

Opinium is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on the pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and resolve commercial issues, helping them to get to grips with the world in which their brands operate, by ensuring we develop the right approach and methodology to deliver robust insight, targeted recommendations, and address specific business challenges.

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About Lansons

Lansons is a reputation management consultancy, 100% owned by a third of its people. It has been voted agency of the year eight times since it was established in 1989 by its Chairman, Clare Parsons and Chief Executive, Tony Langham. Lansons has over 100 colleagues (41 of whom own the Limited Liability Partnership), has won over 70 major awards and works for more than 120 national and international clients. Through its membership of the international networks PROI Worldwide and GFC/Net it delivers global expertise and advice. At the same time Lansons has featured in the Great Places to Work 'Best Workplace' rankings for each of the past twelve years. Our consultants are experts in media, investor, change, political, regulatory, employee, digital, content creation and international communications.

Lansons is a top ten independent communications consultancy, 100% owned by a third of our people. Our consultants are experts in media, investor, political, regulatory, employee, digital and international communications, delivering exceptional advice and the best creative ideas, based on decades of experience and unrivalled sector knowledge.

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About ECREP

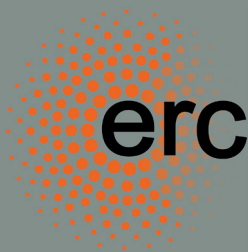
ECREP is a unique and ambitious initiative in electoral psychology led by Professor Michael Bruter together with Dr Sarah Harrison and based in the Department of Government at the LSE. It also involves numerous associate members from prestigious universities such as Columbia, McGill, Zurich, Amsterdam, Leuven, Australian National University, Milano Bocconi, Vienna, Christchurch, and the Hertie School of Governance. The initiative has been supported by two grants from the European Research Council (INMIVO and First Time) and conducts ground breaking research in the broader fields of electoral psychology and electoral ergonomics. It aims to make a global impact by helping independent electoral management bodies and international organisations to put voters and their interest at the heart of the electoral democratic process.

ECREP has won several awards such as the Market Research Society award for Best International Research, and is having a constant impact on the protection and enhancement of citizens' democratic rights, with our findings being used by Electoral Commissions and Governments in multiple countries to amend electoral procedures and optimise voters' satisfaction and turnout. In addition to academic publications and series of events and conferences that we organise, our findings have been used directly or formally referred to by European institutions, a national Supreme Court, a Parliament, and have been disseminated in prestigious arenas such as the European Parliament, UK House of Lords, French Assemblée Nationale, and assemblies of Electoral Management Bodies and presented in leading world media such as the Guardian, Le Monde, and Nature.

News and developments relating to ECREP research can be found on the initiative website www.ecrep.org or through our twitter account [@ECREP_lse](https://twitter.com/ECREP_lse). Email contact to M.Bruter@lse.ac.uk or S.L.Harrison@lse.ac.uk.



About
“Inside the
Mind of a
Voter”



A unique effort to understand voters' psychology

Inside the mind of a voter is one of the most ambitious research investigations aimed at understanding the minds of voters in the world. It is conducted by the ECREP initiative in electoral psychology at the LSE led by Prof. Michael Bruter and Dr Sarah Harrison.

We conduct our work in over 25 countries, using a mixture of unique methodologies – from panel study surveys when we re-interview the same people over multiple years to visual experiments where we film the shadow of people in the polling booth and systematically analyse their emotions based on their body language, and the piloting of concrete new initiatives aimed at maximising the vote and satisfaction of first time voters in collaboration with some Electoral Commissions worldwide.

Our project has been supported by two European Research Council grants (INMIVO and First Time) and our long term partner for the survey aspects of the research has been Opinium. Together, ECREP at LSE and Opinium have won the Market Research Society Award for Best International Research for our respective work on this project.

Our project has uncovered a number of key findings regarding the role of personality, emotions, and electoral arrangements on the way people behave both in elections and beyond. Examples include the fact that if a young person abstains for the first two elections when they are eligible to vote, they will become abstentionists for life, the fact that using postal voting makes voters more negative about their outlook and more likely to vote for extremist parties even when controlling for their attitudes and voting intentions weeks before the vote, or even the fact that 29% of American people have already cried because of an election.

