

# Which way to the (Br)exit?

Finding the most acceptable outcome for Britain's political tribes

By breaking down each party's vote by tribe, we can identify the pressure points that may shape how the Labour and Conservative parties tackle the Brexit process.



# INTRODUCTION

With less than a year to go before the end of the Article 50 period and the formal end of the UK's European Union membership, the focus of public debate has belatedly turned towards end-state rather than process.

## What will the United Kingdom's relationship with its largest and nearest neighbour look like and what are the implications of that for British politics?

That future relationship is the focus of this report using our Political Tribes segmentation to tease out differences in attitude groups and political persuasions.

The first section of this report will cover the misnamed “Brexit election” and how things changed between the triggering of Article 50 in March and the aftermath of the general election.

We then come to the main section where we will analyse how the various scenarios and combinations of factors are received by different segments of the population. The goal is to determine what overall Brexit ‘package’ and what combination of factors are acceptable to the greatest number of people.

Finally, we'll look at what each political tribe wants out of Brexit and, by breaking down each party's vote by tribe, identify the pressure points that may shape how the Labour and Conservative parties tackle this crucial process.



## A YEAR ON FROM THE 'BREXIT ELECTION'

Prior to the 2017 general election, domestic politics appeared quite straightforward; the Conservatives were led by a popular prime minister against a hapless and divided opposition and the natural 'them and us' pattern of the Brexit negotiations would see the government benefiting from a rally around the flag effect for the foreseeable future. Calling a general election in those circumstances appeared logical and sensible.

### What happened?

One of the biggest assumptions going into the 2017 General Election was that campaigns don't really matter. Most people's views are largely set in place when an election is called and therefore the real purpose of the campaign is less to change people's minds, but rather to activate people who already lean your way and make sure they turn out to vote. However in 2017 two things changed:

**The first is that snap elections are different to regularly scheduled elections in that public perceptions are still developing.**

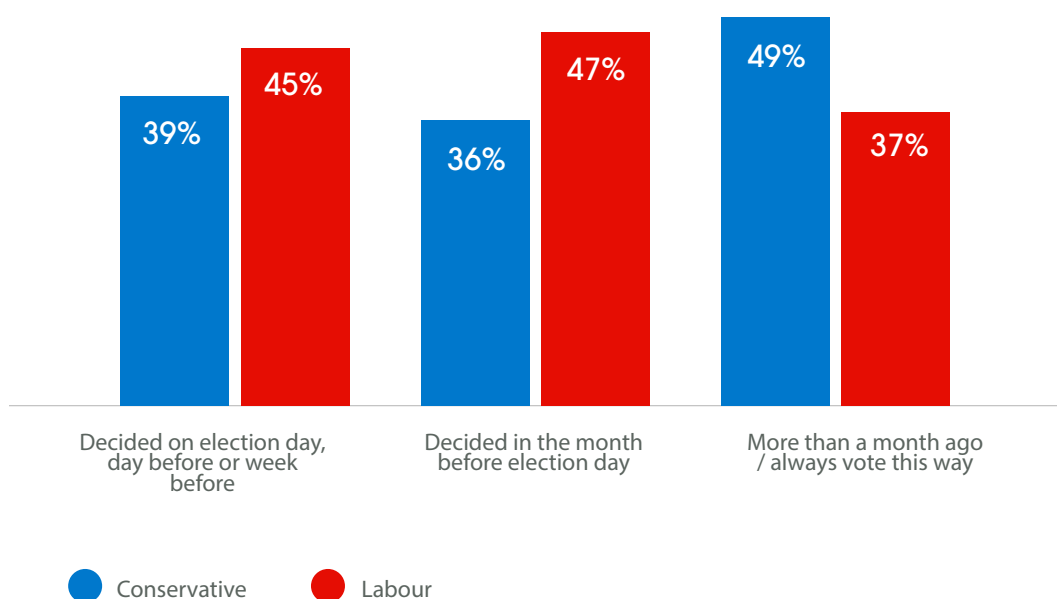
The 2015, 2010 and 2005 elections all had long build-ups and involved leaders who had been in post for many years and were well known to the public. This reduced the scope for perceptions to change sharply. In contrast, 2017 involved three main party leaders who were relatively untested, particularly Theresa May whose ascent to the top of the Conservative Party was as much a result of her rivals falling over themselves as her own political skills.

**The second was that the assumption that campaigns don't matter is based on the idea of having two campaigns, of equal effectiveness, largely cancelling each other out.**

In 2017 however, we saw a surprisingly effective Labour campaign square up against a surprisingly ineffective Conservative campaign and a corresponding impact on the result.

The available evidence shows that the campaign benefitted Labour. Aside from the collapse of the Conservatives' lead in voting intentions, it comes from the on-the-day re-contact survey that Opinium, as usual, sent out to any of our respondents who had given us a voting intention during the campaign. This found that while the Conservatives had a sizeable lead among those who had decided at the start or before the start of the campaign, those who made their minds up in May or June were more likely to choose Labour:

### Late deciders swung Labour



Put another way, more than half (54%) of Labour's vote came from those who made up their minds in the month prior to the election (i.e. the campaign period after the manifestos are launched) vs. 42% for the Conservatives.

A large proportion of these Labour late-deciders are those who were not enthused by Jeremy Corbyn, but who either became convinced by his campaign or held their noses and put their support for the party over their distaste for its leader. Among Labour voters who did not approve of Jeremy Corbyn's job performance, 71% made up their minds after the manifestos were launched with 48% deciding in the final week.


Similarly, among Remain voters who put the cross next to the Labour candidate, and who may have been put off by Mr Corbyn's lukewarm support for the Remain campaign, 70% made up their minds after the manifesto launches.

Finally, far from being “the Brexit election”, the 2017 election was remarkable for barely mentioning the biggest issue facing the country.

Our pre-election analysis of movements within Britain’s political tribes said that, on paper at least, the scope was there for a significant Conservative win. This was based on the fact that the most socially conservative, pro-Brexit quarter of the population – who had previously been split evenly between UKIP and the Conservatives, had moved sharply in the Tories’ direction, driven in part by strongly positive views of Theresa May and her anti-immigration stance. May had effectively consolidated most of the Leave vote while the Remain vote was split between a number of different tribes with sharply divergent views on everything except Brexit.

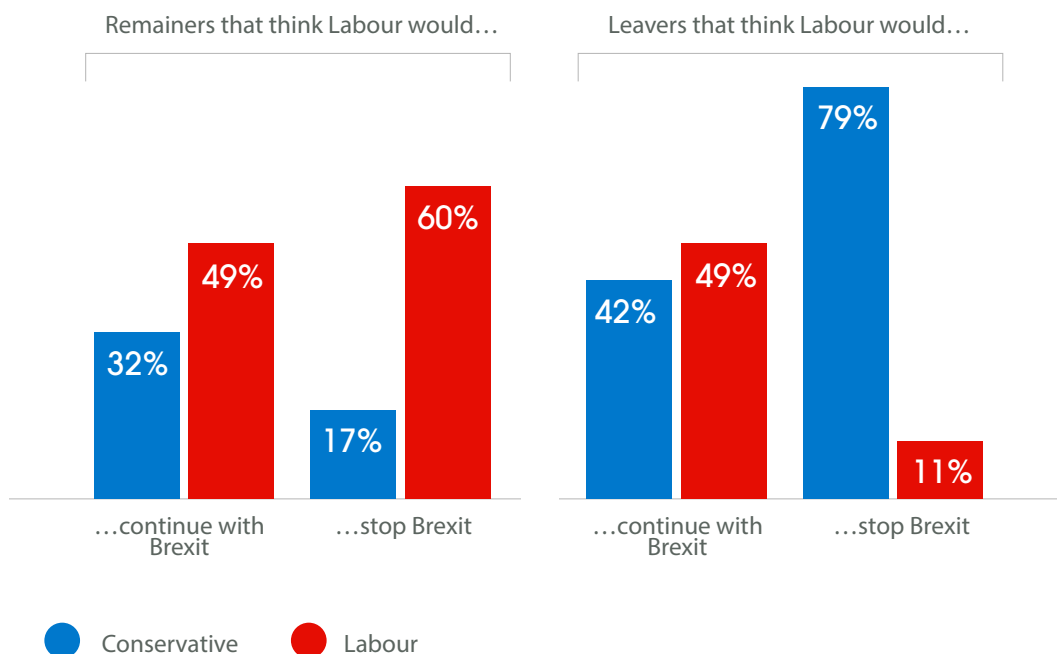
Conservative Campaign Headquarters, however, appeared to disagree with little to no mention of Brexit, and the catastrophically flawed Tory manifesto launch, along with her own performance on the hustings, undermining Theresa May’s leadership advantage. This, combined with Labour’s whipping of MPs to vote to authorise the Article 50 notification, neutralised Brexit as an issue and allowed Labour Leavers to support the party without worrying about them backtracking.

Indeed further analysis of how voters split in 2017 shows that those Leave voters who believed Labour would stop Brexit were overwhelmingly Conservative vs. a more even split among those who believed the party would honour the referendum result.

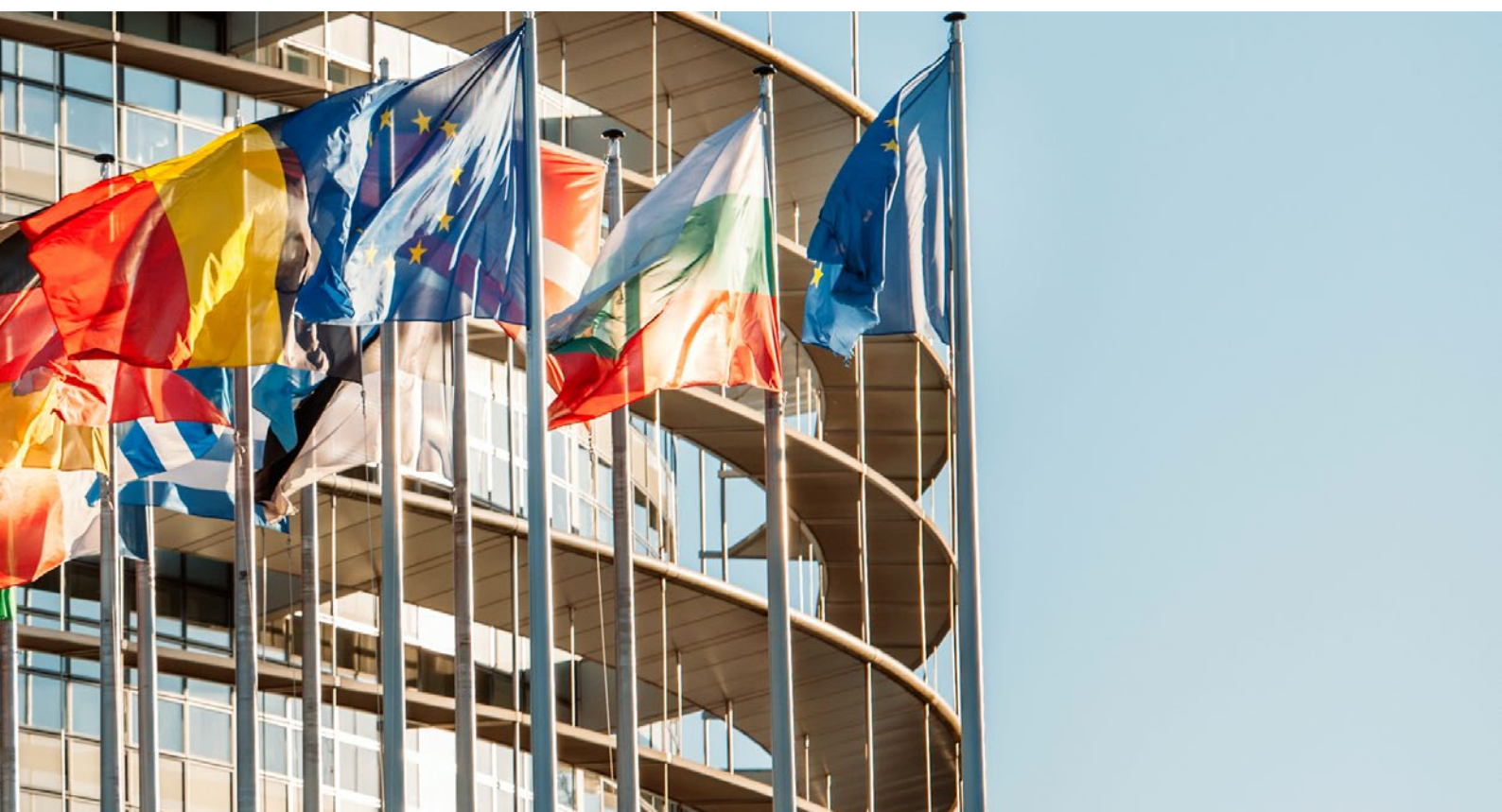


Almost a year on, and more than halfway through the Article 50 timeline, the country finds itself still arguing over what our relationship with the EU should be after Britain formally leaves.

## How we voted based on Labour's perceived Brexit position



Almost a year on, and more than halfway through the Article 50 timeline, the country finds itself still arguing over what our relationship with the EU should be after Britain formally leaves. This report will hopefully shed some light on what form that relationship should take based on what the public would like to happen and, crucially, what they are prepared to put up with.



## EVALUATING THE POSSIBLE BREXIT OUTCOMES

Taking complex situations and distilling them into survey questions that a normal person can answer is a constant challenge for public opinion researchers. Brexit, with its implications for trade, international relations, economics and identity, has long been a category of its own. We therefore approached this task in two ways:

The first looked at individual elements of a possible Brexit end-state (e.g. being able to restrict the number of EU citizens moving to the UK, or unimpeded trade in services with the single market) and asked people whether it was more important that each thing did or did not happen. We then asked them to prioritise by choosing the three most important elements.

The second was by putting together a series of plausible scenarios. Effectively this scale runs from “Norway” (standard membership of the EEA or membership with some opt-outs), to “Canada” (a free trade agreement covering goods but not services) as the degree of economic integration lessens with greater distance. In each one we described the implications for each of the various elements of Brexit before asking participants whether they would find this acceptable or unacceptable.

**An important caveat is that in the various scenarios that we have presented to participants, we have tried to use a ‘reality-first’ approach, avoid outcomes which are unrealistic or farfetched, and specifically avoiding any mention of the word ‘cake’.**

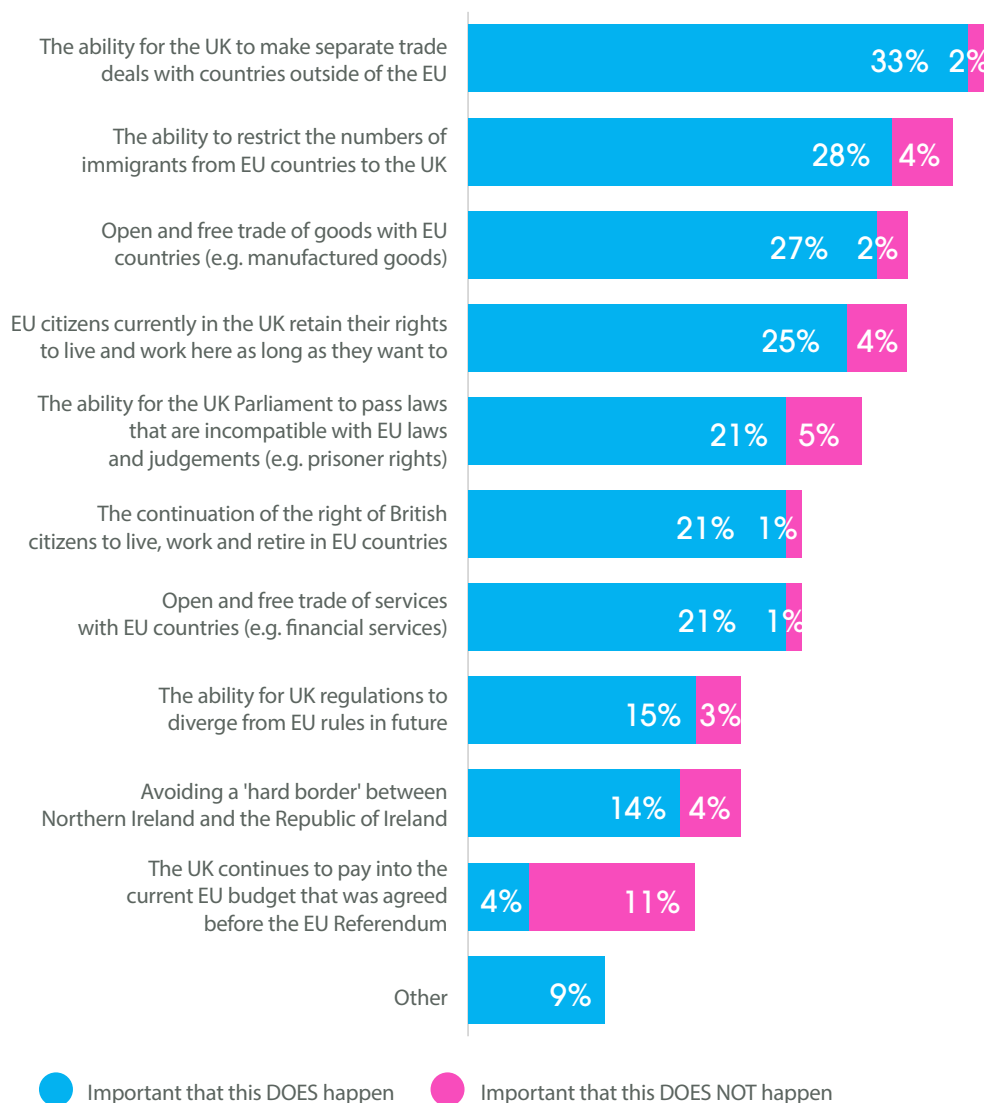
Although ministers talk of ‘creative’ solutions, the actual range of plausible scenarios has been known for some time. Indeed it was frustration with the unreality of the debate which led to this research being suggested in the first place.

## THE INDIVIDUAL ELEMENTS OF BREXIT

The chart below shows the ranking of the various elements that we asked about, according to the proportion saying that it was important that each one does happen.

For example, you can see 33% of our participants said that it's important that the UK is able to make separate trade deals with countries outside the EU while 2% said that it's important that this does not happen.

### How we voted based on Labour's perceived Brexit position



## Trade and the economy

The two top factors that participants tell us need to happen are for Britain to be able to make independent trade deals after Brexit and to be able to restrict the number of immigrants coming to the UK from EU countries. Both points which, in theory, argue for greater separation from the EU and a harder Brexit.

**The high placement of the ability for Britain to make independent trade deals is an interesting one and draws support from both Leavers (47%) and Remainers (24%).**

Even among those who opposed Brexit, there is a sense that, as it is happening, some way must be found to compensate for diminished trade with the EU, particularly given the prominence of new trade deals in the referendum campaign and rhetoric since then.

But this factor makes more sense if thought of as being the highest profile example of potential financial gain after Brexit. At this point you may notice that we haven't included any variants of "more money for the NHS" or "spending the money the UK currently contributes to the EU budget on the NHS". There are two reasons for this. One is that almost all forecasts are of an overall fall in available tax revenue after Brexit rather than an increase. The other is that, in previous polling, relatively few people believed the "£350m per week for the NHS" claim with a plurality of Leave voters believing that it would not be fulfilled or never believing it in the first place. Regardless of how popular promising more money for public services is and what role it might have had in the referendum campaign, it is unrealistic to assume it will be a likely direct outcome of Brexit. We have tried to address this point in a more neutral way by asking about contributions to the EU budget where 11% say it is very important that this stops.

Another interesting result is how much higher "open and free trade of goods" comes (27%) than "open and free trade of services" (21%). Given the dominance of services as a share of British economic output, as well as the fact that ease of exporting services is a significant advantage of the European single market relative to other free trade deals, it is remarkable that public perceptions of international trade are still based on more traditional ideas of manufactured goods and raw materials.

This is a trend that we see among both Remainers and Leavers, with 39% and 16% of each group prioritising continued free trade of goods vs. 31% and 13% prioritising continued free trade of services.

## Immigration - trying to have it both ways

The second most important measure is the ability to restrict the number of immigrants coming to the UK from EU countries. Nearly half (47%) of Leave voters say it is very important that this does happen and even 10% of Remain voters.

There is also strong support for EU citizens currently in the UK retaining their rights as long as they want to, something guaranteed by every Conservative leadership contender in 2016 apart from Theresa May. Among Remain voters this is their second highest priority (38%) with a substantial number of Leave voters (13%) valuing this as well.

Interestingly, figures are similar for British citizens continuing to have what are, effectively, the rights they have under freedom of movement. A third of remain voters (32%) put this in their top three along with a tenth of Leave voters (11%).

**Interestingly, 10% of those prioritising restricting EU migration to the UK also prioritise British citizens retaining freedom of movement rights post-Brexit.**

Although likely a function of the general age gap on the subject, support for retaining freedom of movement rights is higher among younger people than older. Just 15% of over 75s prioritise this vs. 23% of under 45s.



# IMMIGRATION



## Indifference on the Irish border

As the only land border the UK has with another EU country (discounting the channel tunnel), Northern Ireland represents the trickiest problem for Brexit negotiators trying to satisfy competing demands. The UK's desire to leave the single market and customs union necessitates some form of border infrastructure between Northern Ireland and the Republic, the UK government and the Irish government have repeatedly reaffirmed their commitment to avoid such infrastructure, and the reliance of the government on support from the Democratic Unionist Party (DUP) effectively rules moving the border to the Irish sea (having customs checks take place between Northern Ireland and the mainland UK).

However, the importance of this issue is not reflected in the priorities of voters. Just 14% list "avoiding a 'hard border between Northern Ireland and the Republic of Ireland'" as one of their top priorities (20% of Remainers, 8% of Leavers). Even among respondents from Northern Ireland, only 32% list it as a top priority.

## Finding the right combination

**The British public's ideal Brexit scenario, therefore, would include the freedom to make independent trade deals with the rest of the world while maintaining unrestricted trade in goods with the European Union, and the ability to restrict immigration from the European Union while also maintaining EU citizens' rights to live in the UK and British citizens' rights to live, work and retire in the European Union.**

Given that trade-offs between these outcomes is inevitable, we must look at complete packages rather than individual elements.

## LOOKING AT THE EXIT SCENARIOS

A truism of the debate since the referendum was first announced has been that, while leaving the EU in the abstract has majority support, the coalition that made up the 52% have wildly divergent views for what the country should look like after it happens.

We therefore needed to take the various elements of Brexit and combine them into plausible scenarios. None of these scenarios was named and they were presented to participants in a random order.

**The focus was on whether each outcome would be acceptable or unacceptable.**

Therefore as far as the government presenting an outcome goes, we are more interested in what people are willing to live with than what is necessarily their first choice.



NAME (not shown)	PACKAGE 1: “Full EEA membership”	PACKAGE 2: “EEA with restrictions”	PACKAGE 3: “Regulatory alignment”
TRADE	Free and open trade with EU countries (including services)	Free and open trade with EU countries (including services)	Free and open trade with EU countries (including services) as long as UK regulations remain aligned with EU standards
CITIZENSHIP	British citizens have the right to live, work and retire in other EU countries	British citizens have the right to work in other EU countries if they get a firm job offer but cannot stay unless they are working or until they qualify for permanent residence	British citizens would have no rights to live or work in EU outside of what would be permitted by individual EU members
BORDER	No hard border between Northern Ireland and the Republic of Ireland	No hard border between Northern Ireland and the Republic of Ireland	A hard border between Northern Ireland and the Republic of Ireland could be prevented by agreement
PAYMENTS	The UK continues to contribute into the EU budget	The UK continues to contribute into the EU budget	The UK would stop contributing into the EU budget
IMMIGRATION	Limited to no ability to restrict immigration from EU countries	EU migrants to the UK must have a firm job offer and can only stay for as long as they are working or until they qualify for permanent residence	There would be no automatic right for any EU citizens to live or work in the UK, with UK able to set its own immigration policy
EU RULES	Subject to EU rules and regulations with limited ability to influence them	Subject to EU rules and regulations with limited ability to influence them	The UK will agree to adapt all EU rules and regulations with no ability to influence them
Completely acceptable	14%	11%	6%
Mostly acceptable	33%	46%	30%
Mostly unacceptable	21%	19%	32%
Completely unacceptable	19%	10%	15%
Don't know	14%	14%	16%
NET: Acceptable	46%	57%	36%
NET: Unacceptable	40%	29%	47%

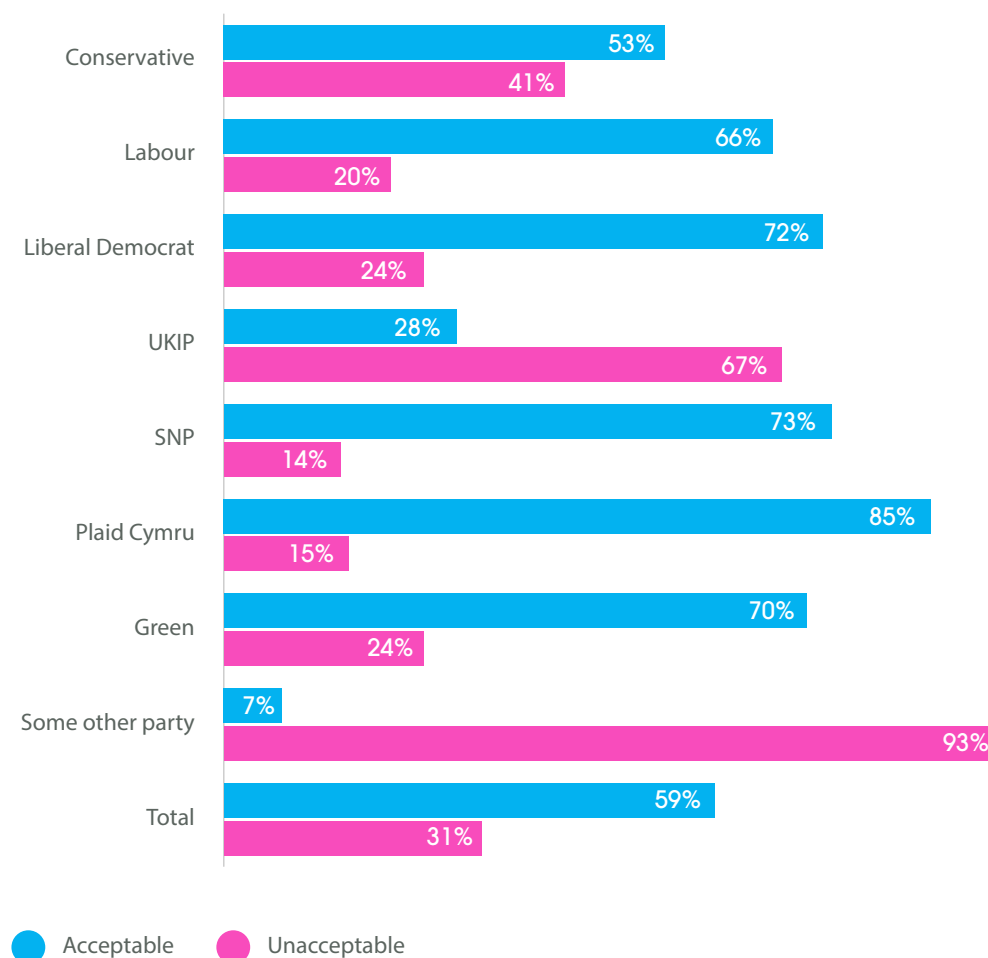
NAME (not shown)	PACKAGE 4: “Canada plus”	PACKAGE 5: “Canada minus”	PACKAGE 6: “WTO”
TRADE	Free and open trade with EU countries with goods and some services (depending on negotiations)	Free and open trade with EU countries with goods but not including services	Tariffs would be imposed on UK trade with the EU, and border checks would be imposed on trade.
CITIZENSHIP	British citizens would have no rights to live or work in EU outside of what would be permitted by individual EU members	British citizens would have no rights to live or work in EU outside of what would be permitted by individual EU members	British citizens would have no rights to live or work in EU outside of what would be permitted by individual EU members
BORDER	There would need to be a hard border between Northern Ireland and the Republic of Ireland to check on goods crossing the border	There would need to be a hard border between Northern Ireland and the Republic of Ireland to check on goods crossing the border	There would need to be a hard border between Northern Ireland and the Republic of Ireland to check on goods crossing the border
PAYMENTS	The UK would stop contributing into the EU budget	The UK would stop contributing into the EU budget	UK contributions to the EU would end immediately
IMMIGRATION	There would be no automatic right for any EU citizens to live or work in the UK, with UK able to set its own immigration policy	There would be no automatic right for any EU citizens to live or work in the UK, with UK able to set its own immigration policy	There would be no automatic right for any EU citizens to live or work in the UK, with UK able to set its own immigration policy
EU RULES	The UK and EU would have “mutual recognition” of each other’s laws and regulations, although UK regulations changes could be ruled incompatible with the EU in future	The UK and EU would have “mutual recognition” of each other’s laws and regulations, although UK regulations changes could be ruled incompatible with the EU in future	The UK would be able to run draw up it’s own regulations as they so wish.
Completely acceptable	9%	7%	8%
Mostly acceptable	35%	33%	28%
Mostly unacceptable	27%	29%	25%
Completely unacceptable	13%	15%	23%
Don't know	16%	16%	15%
NET: Acceptable	44%	40%	37%
NET: Unacceptable	40%	44%	48%

Overall therefore, what we see is that the least acceptable packages are leaving without a deal on WTO terms (37% acceptable) and “regulatory alignment”, something otherwise known as Brexit In Name Only which, given the government’s determination to leave both the single market and the customs union, is what Britain appears to be heading towards.

The scenario that voters are most likely to find acceptable is Package 2, a version of the EEA but with opt-outs and restrictions on immigration from EU countries. This is where we must address another methodological point. While the EU has been quite clear that there can be no cherry-picking of elements of the single market, the precise way that the opt out has been described in the scenario is consistent with EU rules within the single market. This scenario therefore can be counted as realistic, albeit perhaps difficult to sell.

Breaking down views by party support and what is remarkable is how acceptable Package 2 is to Conservative voters.

#### PACKAGE 2: EEA membership with immigration restrictions



As one would expect, Labour voters are considerably more pro-EU while Conservative voters are much more pro-Brexit (67% of current Conservative voters voted Leave vs. 64% of Labour voters who went Remain). Labour voters' most acceptable outcome is to remain in the EEA while Conservative voters' preferred option is the CETA (Comprehensive Economic and Trade Agreement) deal between the EU and Canada but expanded to include services.

**However, EEA membership with enforcement of immigration rules appears to be where some common ground can be struck, with a strong majority of Labour voters, and a narrower majority of Conservatives, saying they would find this acceptable.**

Another interesting finding is that there is comparatively less enthusiasm for any option among Conservatives than Labour voters. Looking at the whole of the scale, from 'completely acceptable' to 'completely unacceptable', no option is completely acceptable for more than 15% of Conservative voters whereas 23% of Labour voters would find staying in the EEA as a regular member completely acceptable.

Although Conservatives are clearer about what they find unacceptable, this is still less clear than what Labour voters think. 37% of Labour voters say leaving on WTO terms would be completely unacceptable with 23% saying the same about a Canada style FTA (that excludes services) and 21% saying this about an FTA that did include services. In contrast, the only comparable figure among Conservative voters is 30% saying that baseline EEA membership is completely unacceptable.

This is a pattern that we also see when we look at the views of the different political tribes.

## Outcomes by political tribe

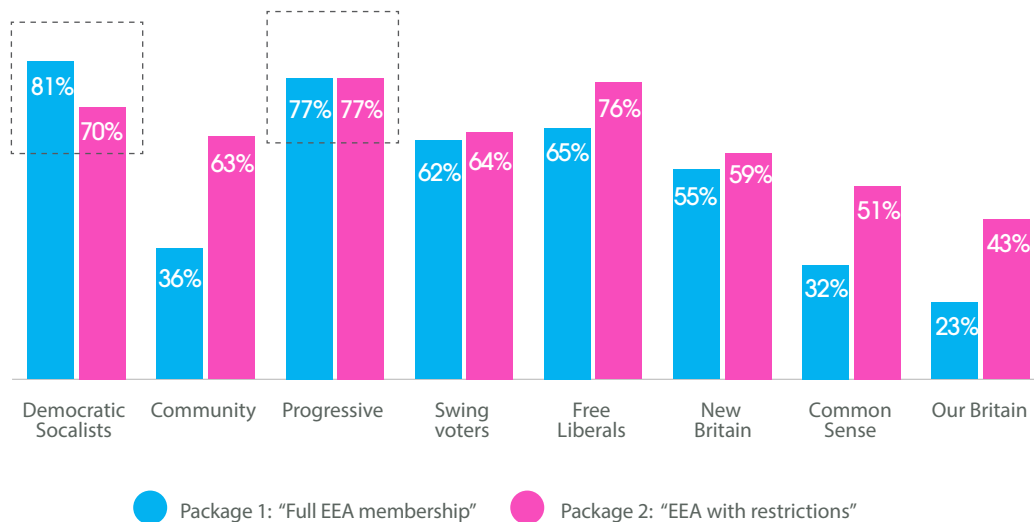
The tribes that most represent each side of the Brexit divide are the Democratic Socialists, and the Progressives (85% and 78% respectively voting Remain) on one side and Our Britain and Common Sense (79% and 61% respectively voting Leave) on the other. Given their conformity and strength of conviction on the subject of Brexit, one would expect each one of these tribes to have strong views about the direction it takes.

## What do they want?

This is true for the Remainers who come out swinging with a clear view of their ideal Brexit package; both tribes heavily favouring the standard EEA or EEA with immigration restrictions.

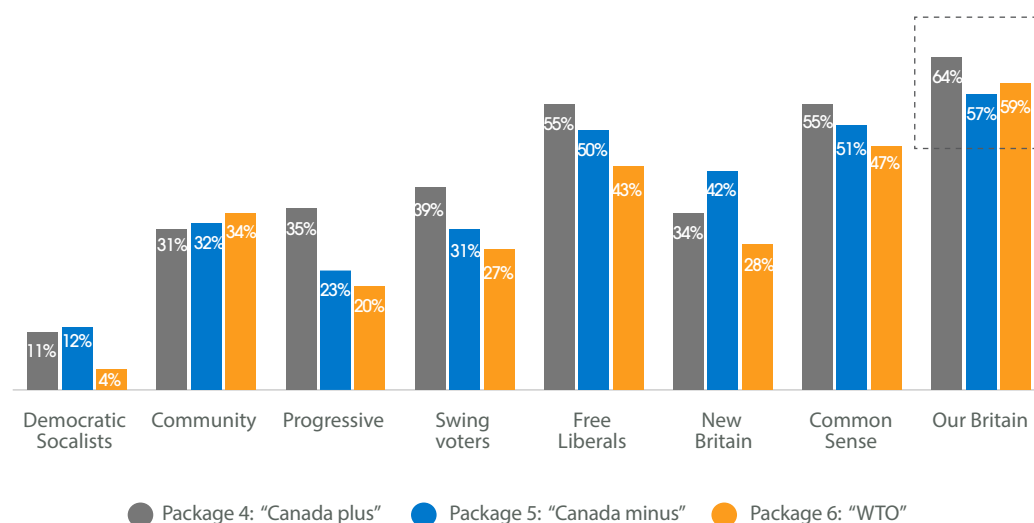


### Brexit outcome packages, % saying each is acceptable



However, looking at the key Leave tribes, you see much less conviction on their ideal outcome. 'Our Britain' say that "CETA with services", "CETA without services" and "WTO terms" are the most acceptable to them. However, for Common Sense there is no strong package that is more acceptable than the others.

### Brexit outcome packages, % saying each is acceptable

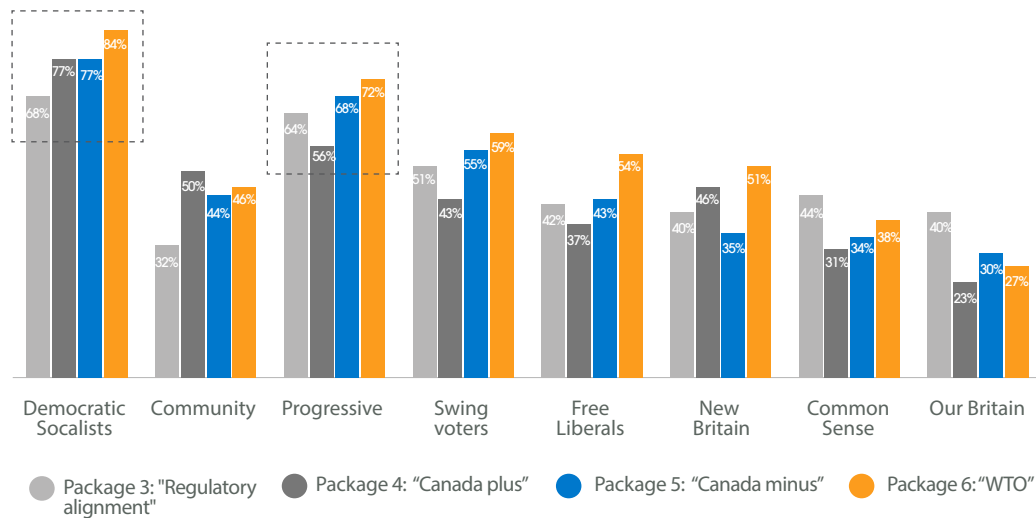


## What don't they want?

There is a similar story when looking at what packages are unacceptable to each of the groups. All packages apart from remaining in the EEA or the possibility of EEA with immigration restrictions are seen as unacceptable by both Remain groups.

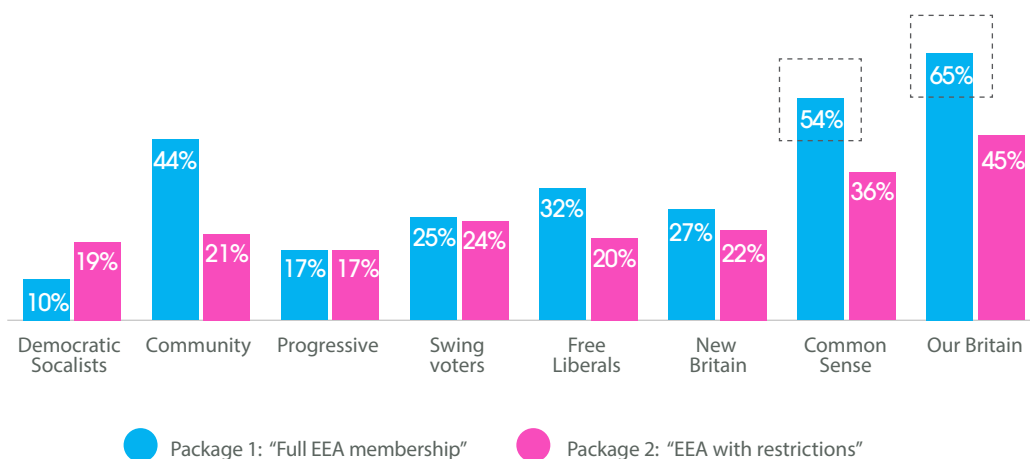


### Brexit outcome packages, % saying each is Unacceptable



Again, this isn't true for the Leave tribes whose main conviction is that standard EEA membership is unacceptable but are less certain about the other outcomes.

### Brexit outcome packages, % saying each is unacceptable



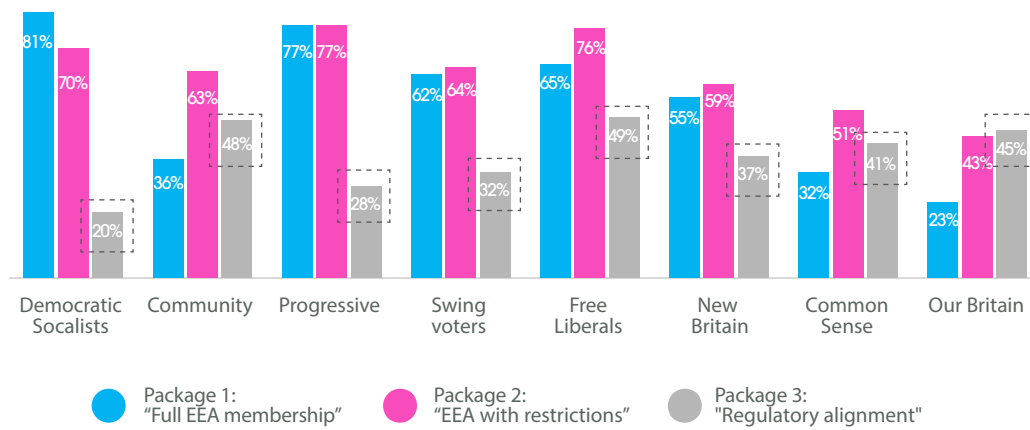
Having won the referendum and seen Theresa May follow through by triggering Article 50, for a great number of Leave voters the job has been done. They care less about the end point than Remainers whose highest priority is avoiding the harder forms of Brexit.

## The problem with Regulatory Alignment

Given recent developments, the most likely ultimate outcome of Brexit appears to be Regulatory Alignment – at least until the end of the negotiated transition period. In this scenario, Britain leaves the formal trappings of EU membership such as the EEA and Customs Union but ensures continued open trade by ensuring that regulations do not diverge too much from those in the EU single market.

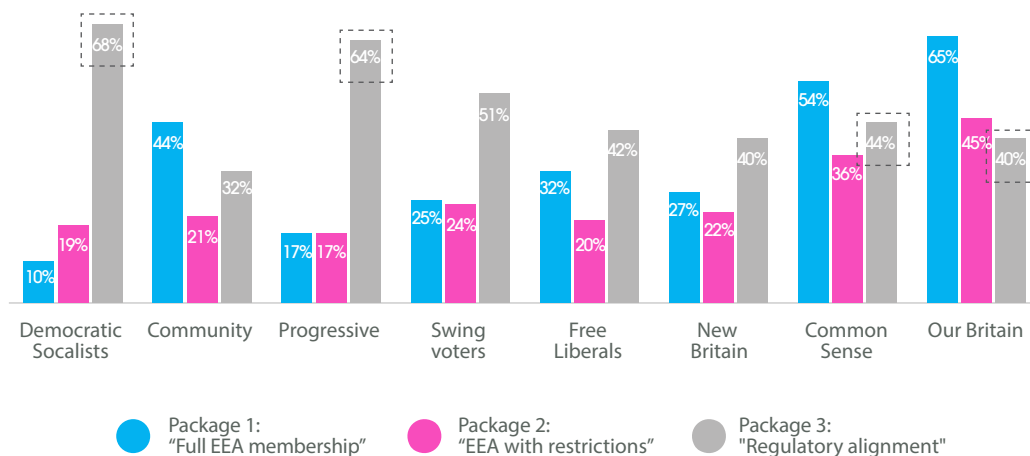
However, no segments find this option completely acceptable.

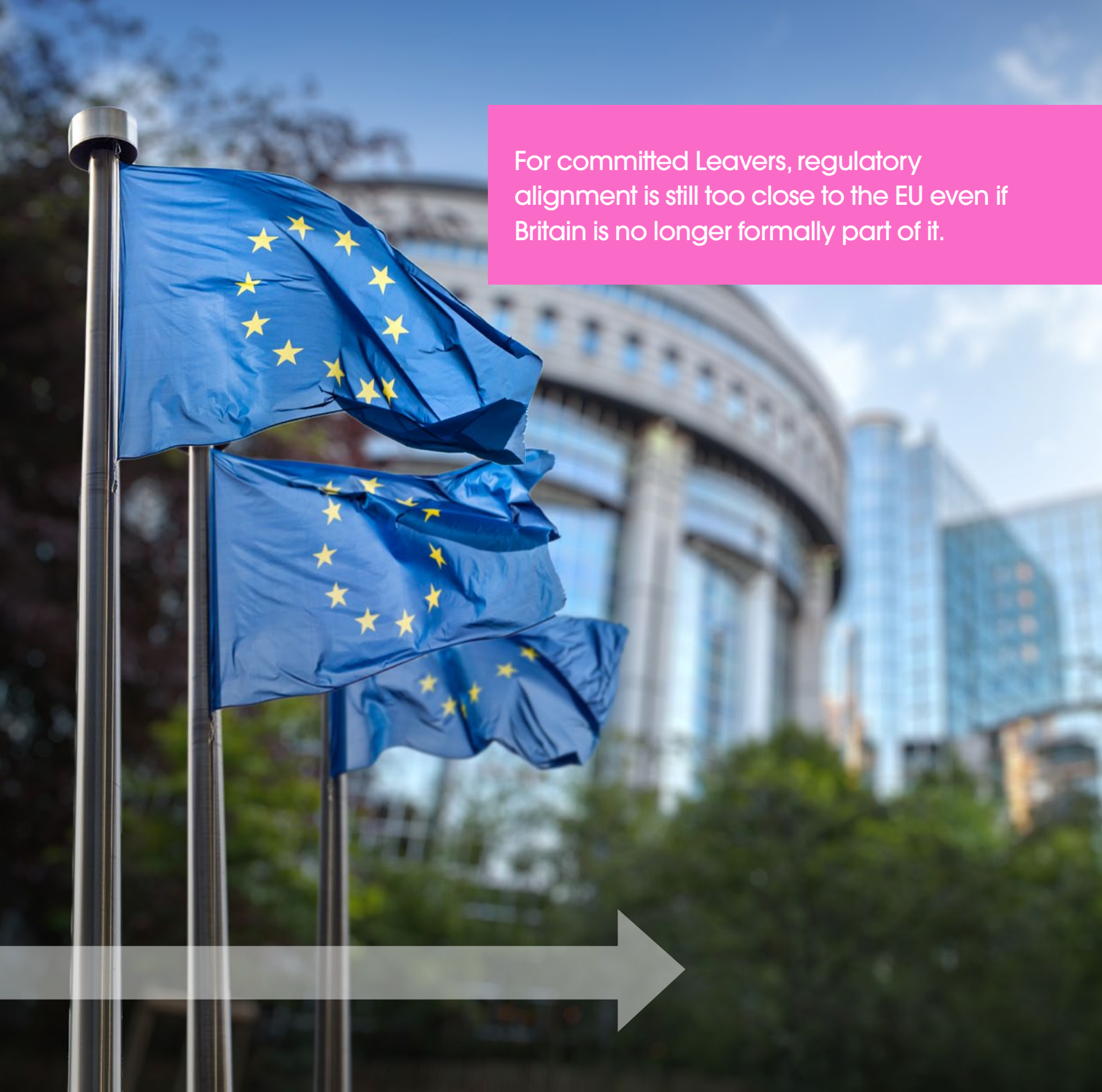
### Brexit outcome packages, % saying each is acceptable



What's more interesting is that those who find it most unacceptable are those who voted strongly for Remain: Democratic Socialists and Progressives.

### Brexit outcome packages, % saying each is Unacceptable





For committed Leavers, regulatory alignment is still too close to the EU even if Britain is no longer formally part of it.

This, in a nutshell, represents the dilemma of trying to find a mutually acceptable solution for a binary disagreement. For committed Leavers, regulatory alignment is still too close to the EU even if Britain is no longer formally part of it. While for Remainers, it represents all the disadvantages of leaving the EU's single market as well as the loss of what influence Britain did have over how those rules were set while an EU member.

## BARRIERS TO COMPROMISE

The most acceptable (and least unacceptable) Brexit outcome package is EEA with immigration restrictions, enjoying broad support across all tribes with only Our Britain giving a negative NET acceptability score of -2.

**Combined with its appeal to supporters of all the major parties, this is the Brexit outcome likely to leave the smallest number of people angry. It has two significant problems though.**

The first is whether such an outcome is even possible. The precise wording of the scenario was designed to fit within the way that other EU countries apply immigration restrictions within the framework of freedom of movement such as habitual residence tests about whether migrants from other EU countries can support themselves financially or require support of public services. However, these may not be practical in a British context (many countries, for example, have mandatory ID cards, something which has always proved politically problematic here) and also does not allow limits on overall numbers, another bone of contention. The scenario, to an extent, plays on traditional misunderstandings about immigration such as the gross underestimates of what proportion of EU citizens come to the UK to work, their tax contribution and consumption of public services. Given that all of these things were true before the referendum, it seems unlikely that placing restrictions on EU citizens who come to the UK without firm job offers or who aren't able to demonstrate self-sufficiency, would make a significant enough dent in the debate.

The second is the politics of the Conservative Party and Theresa May's position specifically.

Whereas the Labour vote is split among many different tribes (29% are Democratic Socialists, 16% Progressive, 15% Our Britain), Conservative voters overwhelmingly fall into Common Sense (43%) or Our Britain (30%), the two most pro-Brexit tribes. Indeed, although the Conservatives lost their majority in 2017, their vote share did increase by 5% and much of this growth came from Our Britain, a tribe where 69% believe immigration is a burden on society.

So the way Brexit has divided society has pushed the Conservatives further and further to one side of that divide. Among those who find any form of EEA membership unacceptable 53% would vote Conservative in a general election. Similarly, 41% of Conservative voters would find such an arrangement unacceptable.

Although a narrow majority (53%) of Conservative voters would find this acceptable, those Conservative voters who aren't more than reluctant Remainers. On a scale of 1-10, where 1 is very strongly supporting remaining in the EU and 10 is very strongly supporting leaving, 48% of Conservative voters put themselves at "10" vs. just 13% putting themselves at 1.

The difference between a Brexit outcome that is acceptable to the Conservative party and one that is acceptable to the country more broadly is considerable. Trying to balance these tensions while not appearing to do so is why the least acceptable Brexit outcome appears to be the one we are most likely to get.



The most acceptable (and least unacceptable) Brexit outcome package is EEA with immigration restrictions, enjoying broad support across all tribes

## ABOUT US



### **Adam Drummond // Senior Research Manager**

Adam is the Head of Political Polling and has been with Opinium for six years. In that time Opinium have accurately predicted the result of two London Mayoral elections and the EU referendum. Adam works with clients in both the corporate space as well as universities, charities, campaign groups and news organisations.

**[adamdrummond@opinium.co.uk](mailto:adamdrummond@opinium.co.uk) :: 0207 566 3194**



### **Jack Tadman // Senior Research Executive**

Jack is a senior researcher on Opinium's political and social team, working with public sector and political communication clients to help them achieve their strategic goals. Jack also specialises in NPD and brand and communications projects for corporate clients.

**[jacktadman@opinium.co.uk](mailto:jacktadman@opinium.co.uk) :: 0207 566 0220**



### **Priya Minhas // Research Executive**

Priya works on a range of UK focused and international research as part of the thought leadership, political and social teams at Opinium. Priya has helped clients to understand some of the key socio-economic trends taking place, helping to inform their strategy and approach to communications.

**[priyaminhas@opinium.co.uk](mailto:priyaminhas@opinium.co.uk) :: 0203 119 3680**

## **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 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 overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

**[www.opinium.co.uk](http://www.opinium.co.uk) :: [research@opinium.co.uk](mailto:research@opinium.co.uk) :: 0207 566 3190**