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BritainThinks Breakfast Briefing

Brexit Diaries: Key Insights

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britainthinks.com

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context**



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Where next?

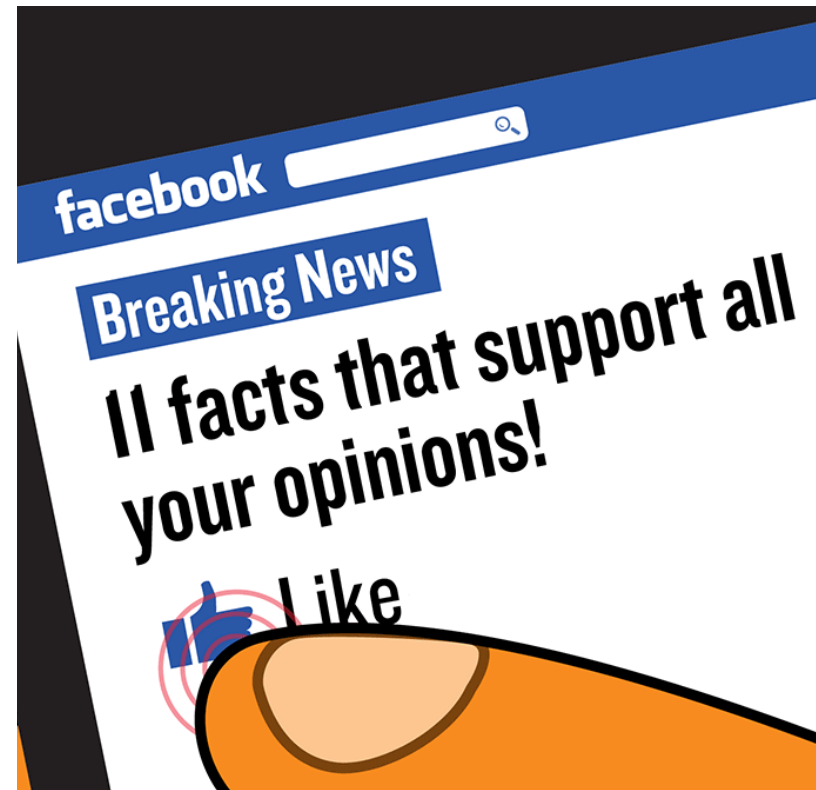


The referendum context

Four lessons from the referendum



A divided society



**Echo chamber
existence**



Out-of-touch elites

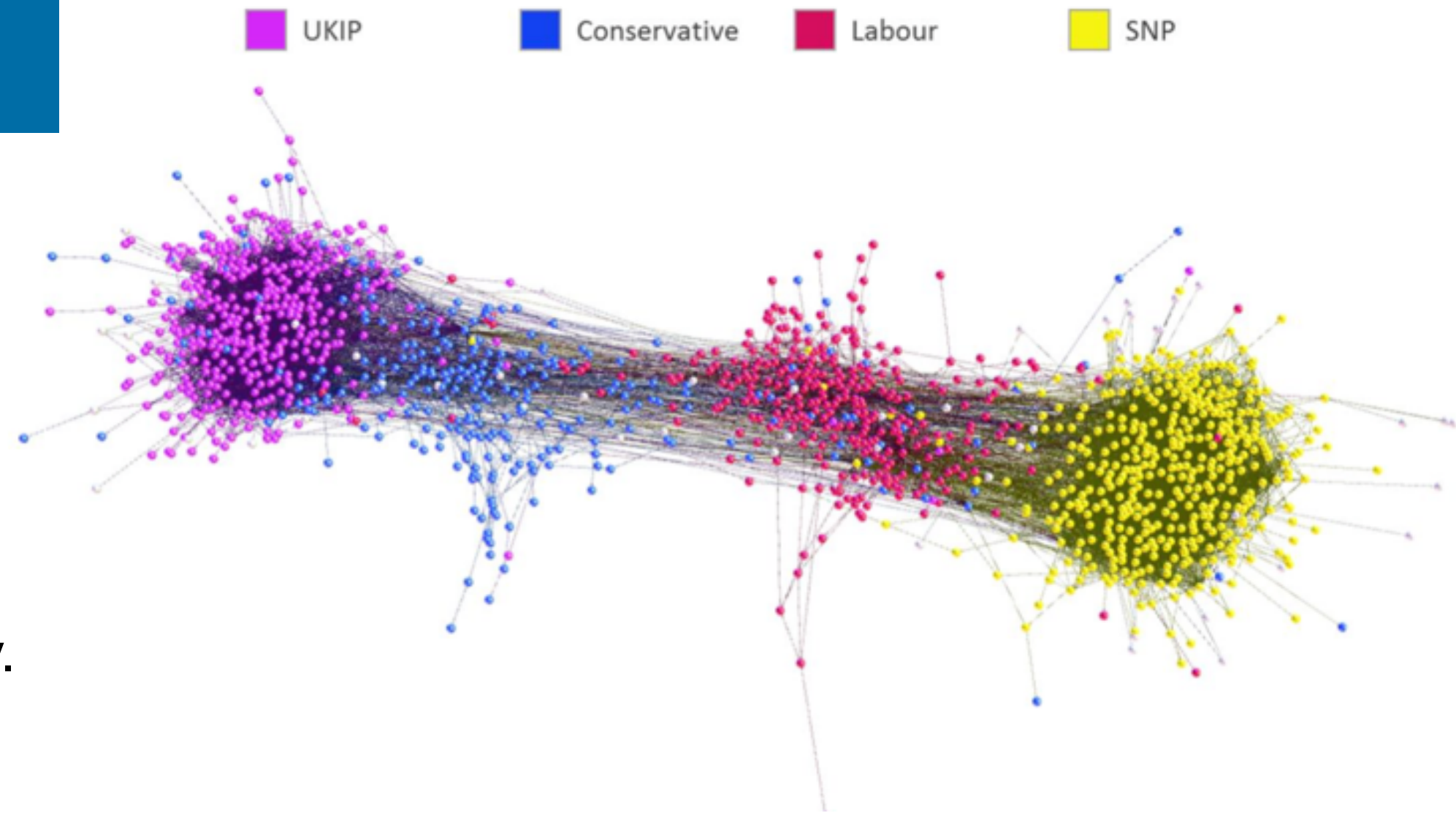


Distrusted experts

These are still relevant

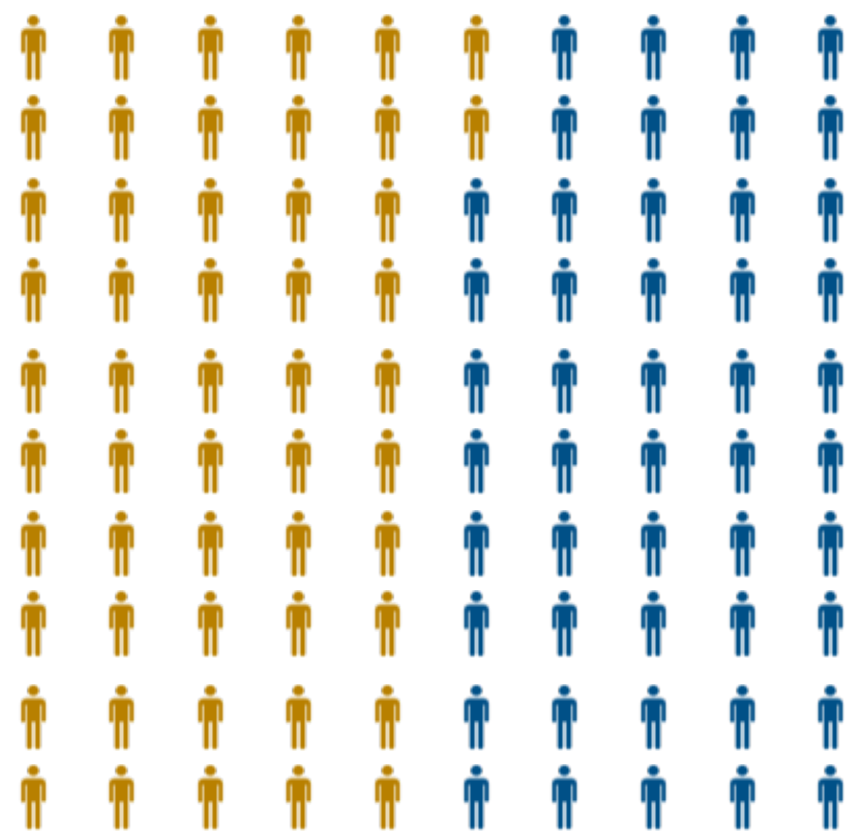
Echo chambers persist

- People do not read viewpoints that they do not agree with
- It is very easy to predict what people on each side of the debate are going to say.

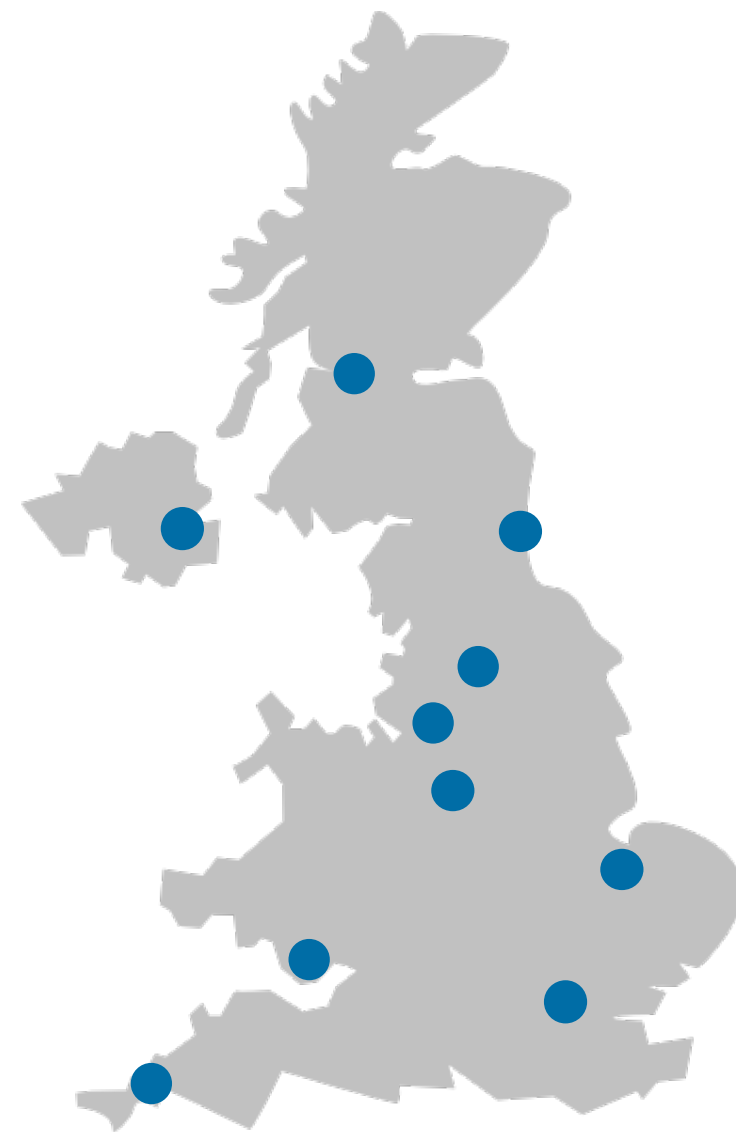


Source: Demos

We wanted to see how people experience the Brexit process



100 people



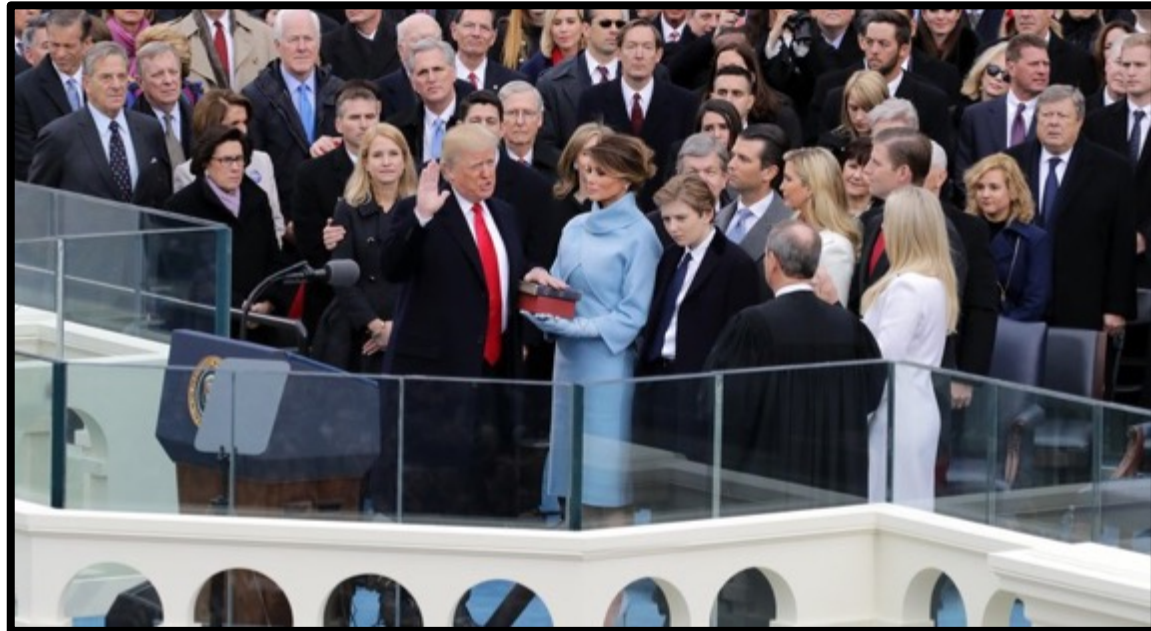
In 10 locations

theguardian



Weekly diary

It's been an eventful few months...



The 5 most important things that we've learned

1.

A Leave vs. Remain distinction is too simplistic

2.

Economic arguments don't currently matter to Leave voters

3.

Brexit will be tricky for brands to navigate

4.

Expectations for life after EU membership are sky-high

5.

The public and 'elites' still think very differently



Five key insights

1

Two tribes go to war?

- Dividing into Leave and Remain voters is often too simplistic a distinction

Leavers and Remainers often inhabit entirely different worlds

Leave

elation European
immigration nation
optimistic
border cover-up relief
silly lie joy joke divided
Britain cost change lost
freedom exit
uncertainty future
independence
control propaganda
finances frustration
autonomy

Remain

controversy
long-process
xenophobia discrimination
election Parliament freedom
Europe single-market sovereignty
divisive confusing
debt uncertainty
fear economy anxiety
terrible racist Prime
jingoism travel Minister difficulty
disastrous worrying
volatile-market
completed

Q. What three words do you associate with Brexit?

And interpret key terms in different ways

Leave

- **“Hard” on immigrants**
 - A tough stance
 - Restricting immigration to very low levels (if not zero)

Hard Brexit

Remain

- **Difficult for the UK**
 - Likely to cause the country and its citizens more problems or hassle

- **From excessive bureaucracy**
- **From overpopulation (within the UK)**

Freedom

- **To live, travel and work in other countries easily**

- **Direct democracy**
- **The will of the people**

Democracy

- **Due process**
- **Parliamentary oversight**

Q. What three words do you associate with Brexit?

But the true picture is more complex

Die-hards



Cautious optimists



Accepting
pragmatists



Devastated
pessimists



For “die-hards”, Brexit has been life-changing



- Vindicated by Brexit
- Very unwilling to accept any that there could be any negative consequences
- Driven by righteous indignation and urgency
- Extremely concerned about any attempt to “derail” Brexit

“For most of my adult life, certainly in the past 20 years, I’ve felt an impotent rage that those in positions of power in the government have no idea how their often potty and sometimes dangerous ideas impact on the worker bees of the UK and their families.”

“There is so much news about Brexit, some of which makes me too angry to read fully - such as the liberal elite who rail against democracy because they don't personally agree with leaving the EU and using their wealth and positions to take their petulance to the Highest Judicial Courts.”

“Cautious optimists” may have concerns, but no Bregrets



“I heard on the radio that the government have voted to start the motion for Brexit. I feel relieved they’ve made a decision finally, but worried about changes.”

- Still believe Brexit is best for Britain
- Potentially confused about process
- Worried about uncertainty and division
- However, winning on sovereignty and immigration outweighs these concerns

“Accepting pragmatists” want to move on

*“[TM’s speech] lifted my hopes
and perhaps it’s not all doom and
gloom.”*

- Initially disappointed, but have come to terms with result and are resigned to it – not wracked by “Branguish”
- Now want best Brexit for country
- Concerned about future generations



“Devastated pessimists” are still struggling with the result

“[TM’s speech] angered me because I still believe that Brexit will not be of benefit to this country and that a lot of people voted out based on invalid opinions.”

- Cannot see any positives
- Many bitter about the political establishment
- Believe that Leave voters have been duped



Theresa May currently appeals to three of the four segments

Average rating among
Leave Voters

6.3
(out of 10)



Average rating among
Remain Voters

4.0
(out of 10)



"She is going to negotiate a uniquely British arrangement with the E.U., not quite like what any other country has. She will take into account what people want and stay calm."



"She seems trustworthy and thoughtful."



"I think she has had to take a positive attitude regardless of her opinion – she doesn't have a choice but to get on with the job."



"I don't think she knows what she is talking about.."



It's unclear where Jeremy Corbyn is targeting on this cross-section

Average rating among
Leave Voters

3.5
(out of 10)



Average rating among
Remain Voters

2.1
(out of 10)



"Not really sure how he feels, he has no authority when it comes to Brexit, he can't even lead his party."



"He seems to have always had reservations on the E.U. He is unenthusiastic about Brexit but wants it work out well despite lack of input from him."



"I really don't have a clue...if pushed I would say he is a Brexit supporter."



"Disgraceful and pathetic."



2

It's the economy, stupid?

- Economic arguments are currently far less important than other factors to Leave segments

Most are increasingly resigned to the cost of leaving the EU

- Many believe that costs will go up, if only in the short term

"I'm not sure [how much it will cost], but it is more likely to cost me than save me money."



"I don't think it will ever save money, it will increase 10-20% on outgoings."



"It will cost me far more money on goods. I don't think I will save anything."



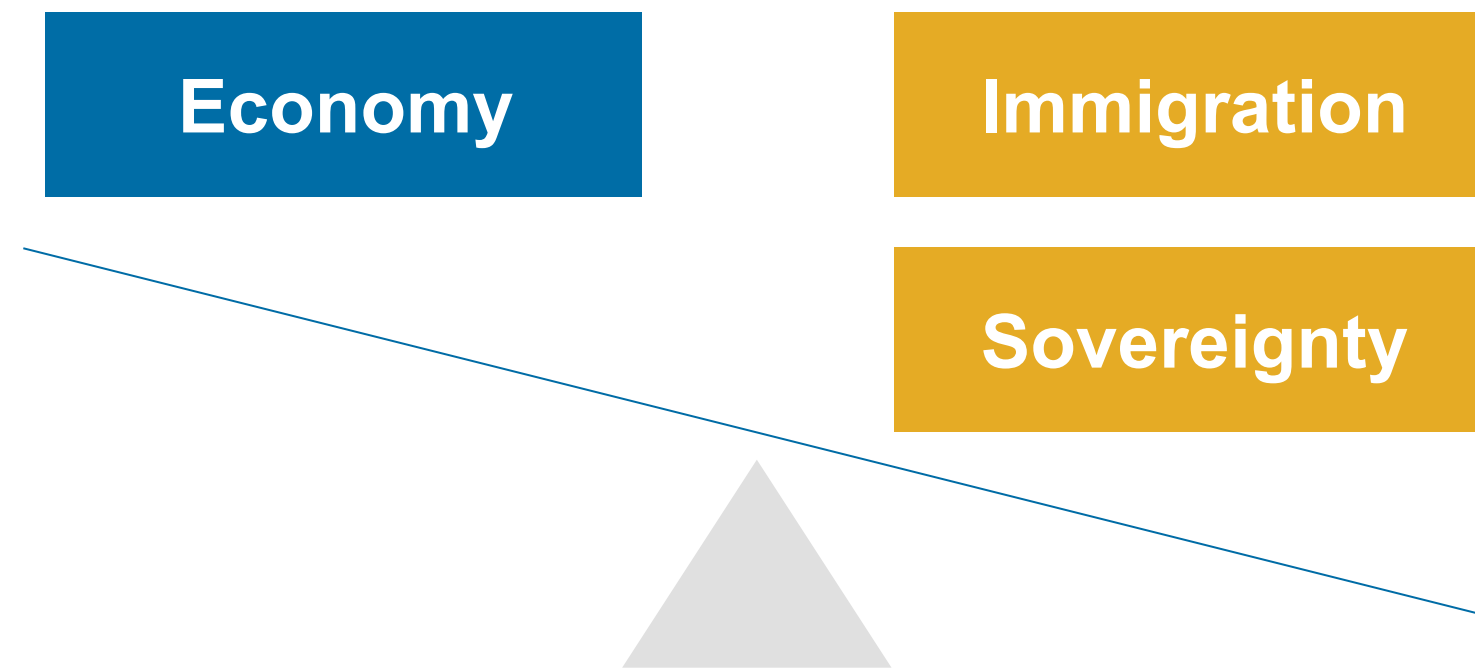
1.

For *cautious optimists* and *die-hards*, the economy is less important than other factors

2.

Some economic news is contested

1. Economic considerations matter less to Leavers (at the moment)



- For Leave voters, the opportunities to control immigration and restore sovereignty were the main drivers of their vote
- The economic arguments are sometimes contested, but....
- ...more importantly, both “die-hards” and “cautious optimists” say that they don’t care
- This may change over time – however, significant and directly attributable effects would be necessary

2. Some economic news is contested

- We tested reactions to a series of economic news:



- Which leads us to our next insight...

3

Brexit will be tricky for brands to navigate

- Customers are wary of brands using Brexit “as an excuse”

Different types of economic news attract different reactions



Prices



Jobs



Immigration and the NHS

Price increases are viewed with scepticism by all segments



Prices

- Price increases are widely seen as **opportunistic**
- (Perceived) reasoning for price increases rarely seen as credible – particularly at this early stage in the process
- Cynically considered expected behaviour of businesses

“It’s very sad that these companies have to make money from scaremongering.”



“I don’t know about the logistics about why [Nescafe] are increasing but shame on them if they are increasing prices on a forecast instead of facts.”



“It feels like [Marmite] were very quick to increase prices, and not clear on their justification. I’m less keen on the company.”



“The companies are taking advantage...Brexit should not be an excuse to push up prices.”



Job news is viewed in a more sanguine way



- Many link this to wider global economic forces, **unrelated to Brexit** – these are frequently viewed with a sense of resignation and powerlessness.
 - Not linked to Brexit
 - Not particularly concerning
 - Seen as part of being a savvy business
- Some *die-hards* think UK economy is best off without “foreign” businesses – often a sense of bloody-mindedness
- *Devastated pessimists* and *accepting pragmatists* are both concerned about job losses – Leavers are rarely concerned about this.



“We live in a very flexible world and companies move for various reasons. It may not have anything to do with Brexit but they and others could use it as an excuse.”



“Vodafone will go wherever it’s cheaper, regardless of Brexit along with other companies. There’s not much we can do.”



“This will be particularly bad for the economy in Berkshire, so I do hope this won’t be the case.”

NHS and immigration interact in varying ways

- *Die-hards* tend to see immigration as the root of many problems – they can therefore only see opportunities in the fall in the number of EU nurses registering to work in the UK
- This is believed to provide greater opportunities for UK staff – allowing them to “get their jobs back”.
- There is currently little concern about the implications for NHS

Immigration currently outweighs concern about NHS



Immigration and the NHS

- *Devastated pessimists* focus on the perceived severe implications for the NHS – believing that this will place greater strains on services

NHS concerns are predominant

- *Accepting pragmatists* are more hopeful – they think that there could be positive outcomes from this, or at least are hoping for the best result.

NHS and immigration concerns cancel each other out

NHS and immigration interact in varying ways

- Die-hards tend to see immigration as the root of many problems – they only see opportunity in the number of EU nurses registering to work in the UK
- This is a good thing – allowing them to “get their jobs back”
- There are about 10,000 EU nurses in the UK – more than in any other country. This is good news as we need to train our own UK staff up and I would like to see more UK-trained nurses being brought through the system.



“It’s no real loss.”



“May be a good thing, we hopefully will get our jobs back.”



“This is good news as we need to train our own UK staff up and I would like to see more UK-trained nurses being brought through the system.”



- Devastated pessimists focus on the negative implications of Brexit – the NHS is going to suffer greatly; this is definitely a huge negative from Brexit.



“The NHS is going to suffer greatly; this is definitely a huge negative from Brexit.”

NHS concerns are predominant



“Hopefully they’ll bring back the nurse training bursary system.”

hopeful – they think that there could be positive outcomes from this, or at least are hoping for the best result.

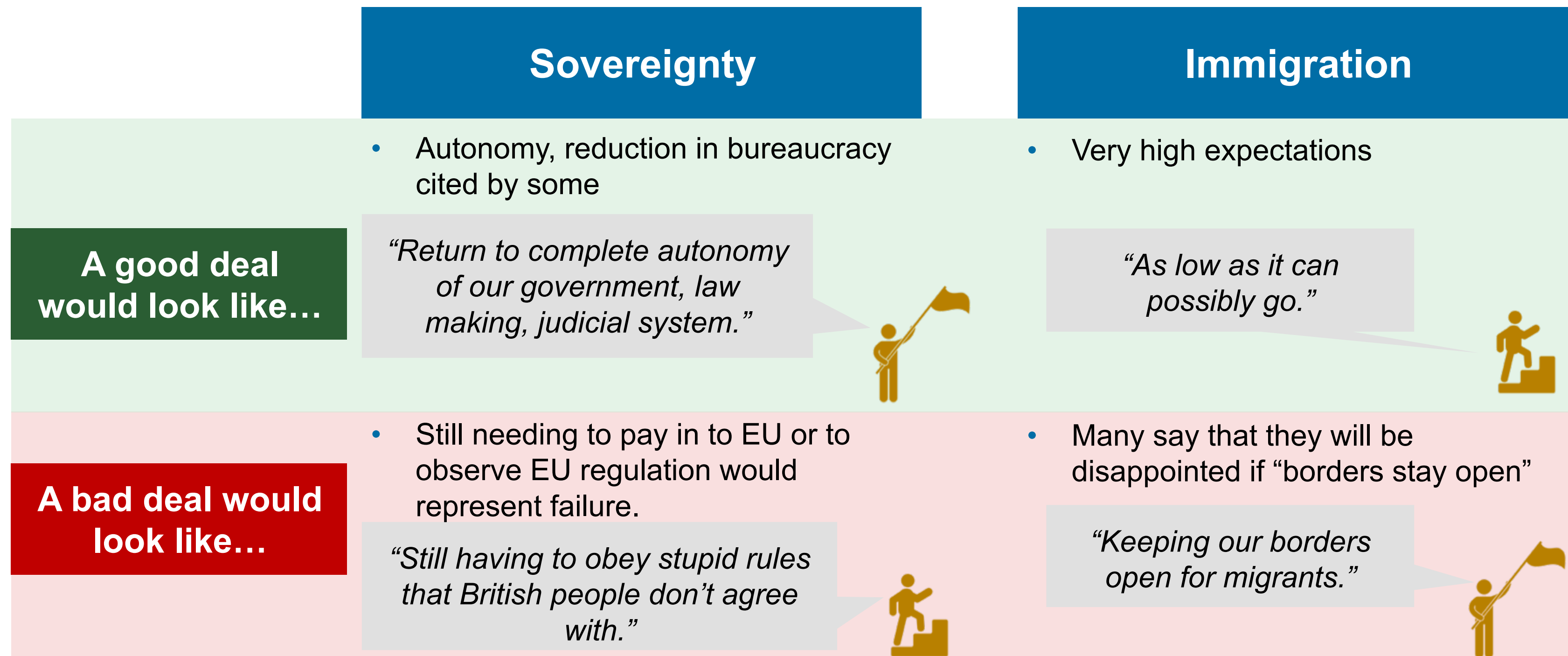
NHS and immigration concerns cancel each other out

4

A good deal of expectation

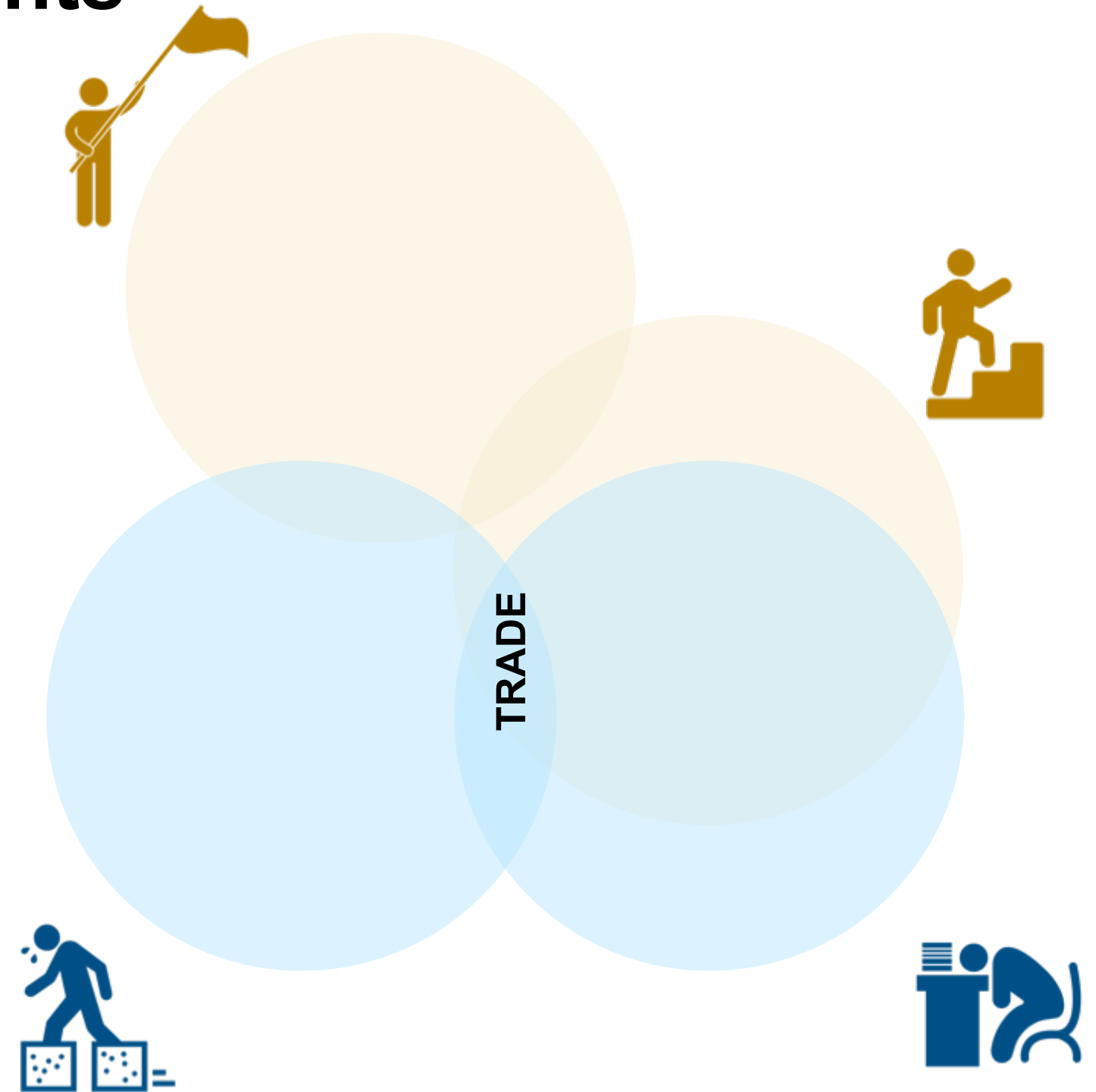
- It will be a challenge for the Government to deliver everyone's demands

Unsurprisingly, sovereignty and immigration are key to Leavers' desires for a deal



Trade is important for three of the segments

- All segments except for *die-hards* cite trade when talking about what a “good deal” with the EU would look like
- For *die-hards*, trade is far less important than success on sovereignty and immigration. These are also likely to reject the EU entirely and focus on the rest of the world.
- For *cautious optimists*, trade is still important – and many say that they would still like good relationships with the EU
- However, this does not mean the Single Market is a priority for Leavers – this is only mentioned by the Remain segments



Travel is a high priority for Remain segments – not for Leave

- Although “Freedom of Movement” is mentioned by some Remain voters, this is primarily articulated in terms of travel
 - Specifically, there is concern about needing visas to move around Europe and around European holidays becoming more difficult to organise
 - In some cases, this also reflects a desire to have the ability to work in the EU in the future
- This is rarely mentioned by Leave segments



“I think visas for travel should be hassle-free as the economy benefits from this and so does the rest of the EU.”



“Hopefully freedom to travel and work in other countries will be the same – this is a major perk for the younger generation which the older people don’t care about.”

Expectations are sky-high

- Voters are sanguine about the chances of the UK getting a good deal from the EU
- However, they have high expectations for life after Brexit
- The Government has fed expectations, rather than managed them
- It may prove challenging to meet all of these – particularly on immigration

Perceived likelihood of getting a good deal

Average rating among
Leave Voters

5.0
(out of 10)

Average rating among
Remain Voters

3.8
(out of 10)

“I am looking forward to it. This is a fantastic opportunity to rebuild the country: more police, better hospitals, more schools and teachers.”



“A chance to explore a different avenue for Britain. To see whether this could make Britain even more successful.”



And most anticipate “control”

*“Complete **control** over our border and very tight restrictions on who comes here.”*

*“The main reason was to take **control** of our borders as there is less work for us.”*



*“I believe it’s important that we have full **control** over issues that affect us.”*

*“I’d be happy with a deal that saw **control** over migration policy return to the UK.”*



*“We can **control** our borders and have our own laws, freedom to trade outside the EU without restriction and not pay out vast sums of money to the EU.”*

*“We’ll have complete **control** over how our country is run.”*



*“It will be the complete **control** and responsibility of the nation as to how Britain progresses.”*

5

Elites still think differently from the public

- Attitudes towards Trump indicate the discrepancy

Many Brits find Trump an objectionable person

On him:



“His actions and words do imply that deep down he is racist and sexist, and we should not condone that for anybody, not even the President of the USA.”

On a proposed visit to the UK:



“State visits often involve objectionable leaders. I hope they give an opportunity for our people to influence them a little. Those with reprehensible views and behaviour should be exposed to criticism.”



But they also think he is a savvy businessman...



"I think Trump is a ruthless businessman and Theresa May needs to be careful he doesn't eat her for breakfast."



"I think Donald Trump is a very astute guy and knows the importance of making political allies outside of the USA."

...and many think his policies could work

The travel ban appeals to three of the four Brexit segments



"Why allow citizens from countries that despise your way of life to freely enter your country en masse?"



"I think it was badly executed in his planning, however I agree that there needs to be stringent checks on citizens entering[...] from countries where terror is at high risk."



"America wants to take stock and why not. They should not be forced to take everyone who arrives on their doorstep."



"I can't believe it, I think it's disgusting."

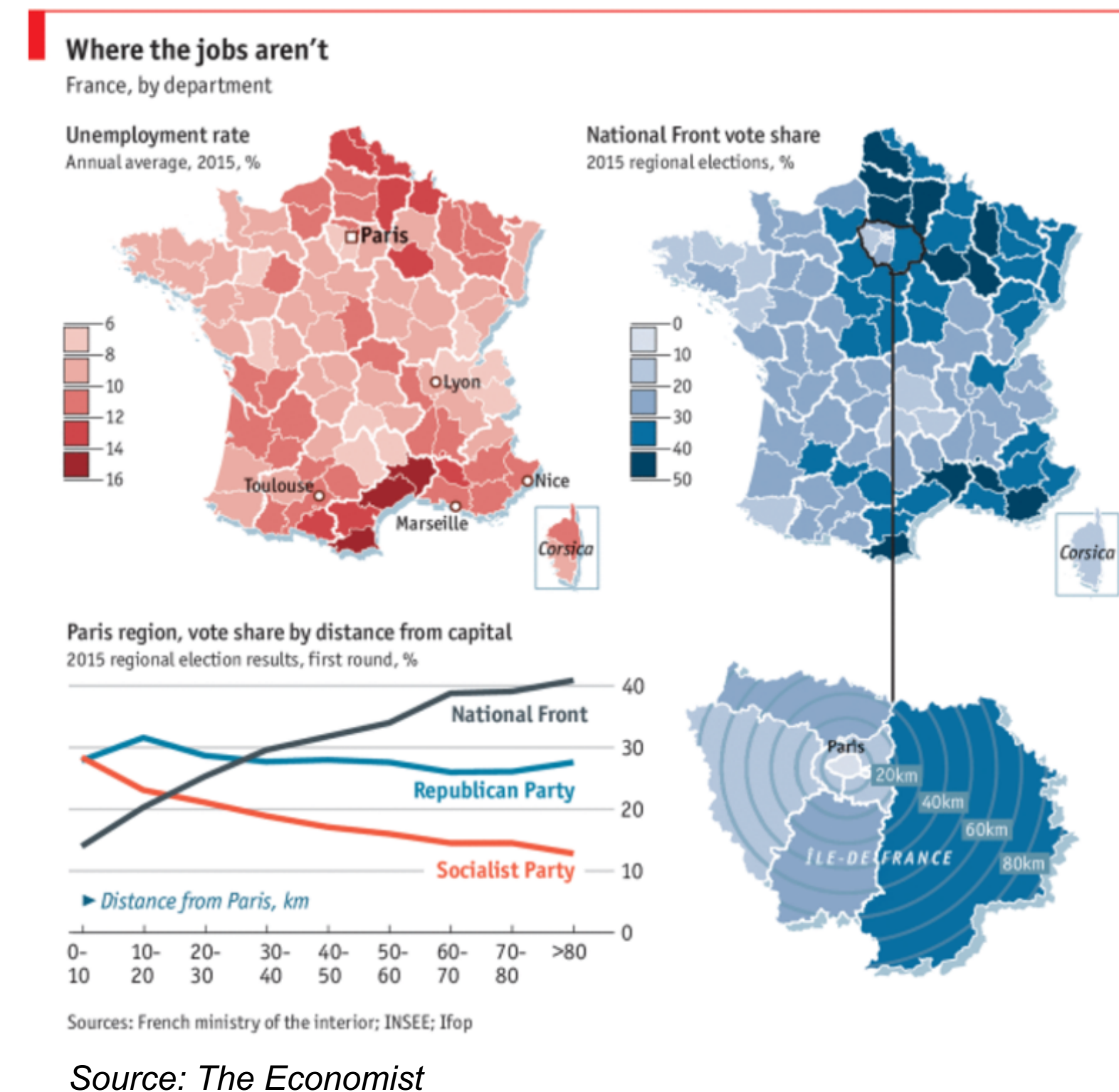


Trump appeals because he is seen to say what others are afraid to

- He “talks sense” and isn’t bound by political correctness
- This appeals to those who feel left behind
- And has clear parallels with Brexit
- As well as the French presidential election



“I applaud Trump for doing what he promised to do should he be elected. How unusual! For having the courage to do what he believes in rather than cave in to the PC brigade.”

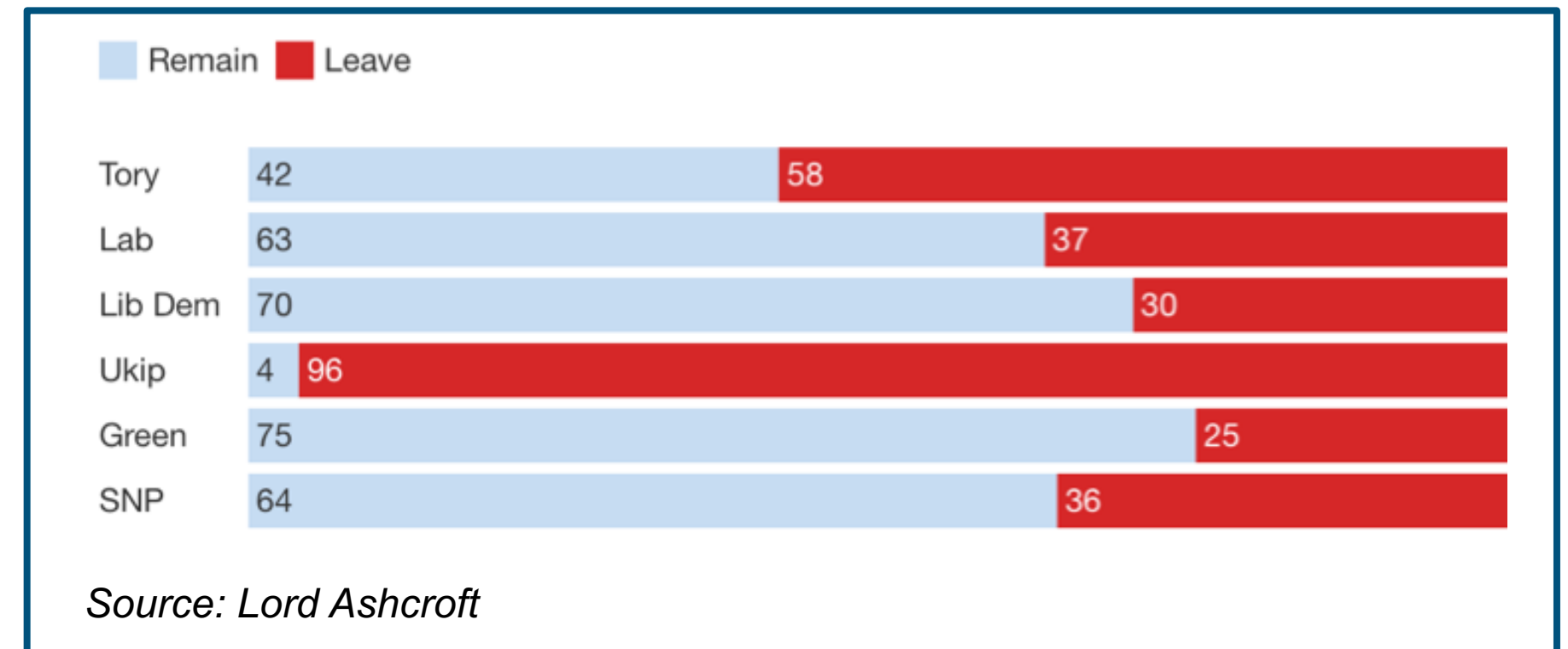




Where next?

Where does this go next?

- Can the Government meet expectations?
- What happens if it doesn't?
- Has Europe become the defining axis for political behaviour in the UK?
- How does this impact the traditional Westminster parties?



Any questions?

Thank you

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