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The Brexit Diaries: engaging with the public in Brexit Britain

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Foreword

By Deborah Mattinson, Founding Partner

At BritainThinks, we drew four key lessons from last year’s referendum. Firstly, we learned that the UK was a deeply divided society. Secondly, it became clear that many British people live in echo chambers, only encountering viewpoints that they agree with. Thirdly, “elites” are out of touch with the public mood. Finally, there is a widespread distrust of “experts”.

Our recent Brexit Diaries research, where we asked 52 Leave voters and 48 Remain voters to keep a “news diary” on a weekly basis from the start of 2017 to the triggering of Article 50, has been tremendously useful in understanding the public mood in this new political landscape, which is still shaped by the forces outlined above. From our perspective, this study has provided five important insights:

1. **A Leave vs Remain distinction is too simplistic** – it is more useful to think about four different types of people on Brexit, which we have labelled *die-hards, cautious optimists, accepting pragmatists* and *devastated pessimists*.

2. **Economic considerations matter less to leave segments than arguments about immigration and sovereignty**.

3. **Brexit will be tricky for brands to navigate** – cynicism towards corporates will make it challenging to break any bad news to the public.

4. **Public expectations on life after Brexit are sky-high**, even if people are relatively sanguine about the prospect of getting a good deal from the EU.

5. **The public and elites still think very differently**, with attitudes towards Donald Trump indicative of this.
We have recently complemented the research with a nationally representative poll of British adults, which has demonstrated just how polarised the public is on Brexit. The majority of the public sit in the two segments at either end of the spectrum – either resolutely positive or resolutely negative about leaving the EU. This has major implications for anyone trying to communicate effectively with the public in the coming years.

This report outlines our current thinking on public attitudes towards Brexit, and the key implications that we see for organisations and brands following the triggering of Article 50.

Please do not hesitate to contact us if you would like to discuss this report further with us.

Deborah Mattinson, BritainThinks
Summary

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
Insight 1: Two tribes go to war

A Leave vs. Remain distinction is too simplistic

Last year’s referendum revealed a deeply divided Britain. Much of the narrative since the referendum has focussed on the distinction between Leave and Remain voters, and this split has undoubtedly been reflected during the course of our Brexit Diaries research. For example, the language used around Brexit by each side is starkly different, as outlined in the diagram below. Key terms of the debate are also used in almost entirely different ways by each side – to Leavers, a “hard Brexit” means one that will be “hard” for immigrants, and entail “hard” borders; whereas, to Remainers, this means that it will be “hard” for the UK to cope with.

Word associations with Brexit among Leave voters and Remain voters stand in stark contrast

However, our research has also shown us clearly that, instead of a Leave vs. Remain distinction, it is more useful analytically to think about four Brexit segments among the general public. While there are hardened viewpoints on each side – labelled die-hards (Leavers) and devastated pessimists (Remainers) in the image below – there are also people with more moderate perspectives on this most divisive of debates. We have labelled these people cautious optimists – Leavers who firmly believe that quitting the EU is the right thing to do but also have concerns about “what happens next” – and accepting pragmatists – Remainers who have now come to terms with the result and want the “best Brexit for Britain”.

BritainThinks
Reflecting the extent to which Brexit acts as a polarising force in current UK political discourse, the majority of the public sits in the two segments at the extreme ends of the spectrum – either holding firmly positive or firmly negative views of leaving the EU:

The majority of the public sit at the two ends of the spectrum

The extent to which such a large proportion of the public cannot even countenance the views of the other side obviously poses major challenges for the key political parties, and appears likely to have significant repercussions for the way that politicians speak to voters in the future. Despite this, Theresa May currently appeals to three of the four Brexit segments (everyone apart from the devastated pessimists) – our research in recent months has consistently shown that many voters believe that she is doing a good job, making the best of a difficult hand.

Theresa May currently appeals to three of the four Brexit segments

In contrast, Jeremy Corbyn is not currently appealing to any of these segments – many are confused about his position on Brexit, and those who feel that they understand it bemoan a perceived lack of conviction to his stance. Further detail on each segment is included below.
**Die-hards**

Typically older and from lower socio-economic grades, die-hards are archetypal of the “left-behind” voters who were covered so extensively by the media in the immediate aftermath of the referendum result.

Die-hards feel vindicated and liberated by Brexit. For many, the result represents satisfaction and representation after years of feeling disenfranchised from the political system.

This segment can also be characterised by a feeling of anger or resentment, and this is the driving force for current attitudes towards Brexit – particularly towards any perceived attempt to derail the process of the UK leaving the EU.

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“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.”

**Cautious optimists**

Contrary to much of the media narrative about Brexit, not all Leavers are quite as full of conviction as their die-hard counterparts.

More likely to be women than men and often middle-aged, cautious optimists still firmly believe that voting to leave the EU was the right thing to do – they do not regret their decision at all. At the same time, they may be uncertain about what the future holds, and see negatives as well as positives to leaving the EU.

In particular, cautious optimists can express uncertainty about the process of leaving the EU – they may be confused as to where we are on the journey to leaving and unclear as to why events such as debates in the House of Lords are happening.
Accepting pragmatists

In many ways the Remain equivalent of the cautious optimists, accepting pragmatists tend to have a relatively nuanced view of Brexit.

Often younger and from higher socio-economic grades than cautious optimists, however, this segment was initially disappointed by the outcome of the referendum, but has generally come to terms with the result and is keen to move on.

These voters can see some upsides to leaving the EU, and generally think that Theresa May is doing a good job in the circumstances. Their focus is now on ensuring that Britain gets the “best Brexit” possible, so that future generations are in the best possible position.

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

Devastated pessimists

Typically younger, more affluent and from London or the South East, devastated pessimists are in many ways characteristic of the “metropolitan elites” that some Leave voters consider alien.

Almost completely disconsolate about the result, these Remainers can see no significant positives about the Brexit process.

“[Theresa May’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.”

This colours their interpretation of current political events – they now have a widespread distrust of the political establishment and are unique in being the only segment to hold negative views of Theresa May. Consistent with all other segments, they have a dim view of Jeremy Corbyn’s position on Brexit.

Devastated pessimists are convinced that all Leave voters have been duped by unfounded lies about the UK’s life outside the EU.
Insight 2: It’s the economy, stupid?

Economic arguments are far less important than other factors to Leave voters

Our research has shown that most voters, with the possible exception of the die-hards, are resigned to the likely cost of leaving the EU in economic terms – most think that leaving is going to cost them money, at least 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.”

Most are resigned to the cost of leaving the EU, at least in the short-term

However, this matters less to cautious optimists and die-hards than other factors – for these segments of the population, the potential benefits of Brexit in terms of sovereignty and immigration currently far outweigh any negative economic trends.

Economy

Immigration

Sovereignty
Insight 3: Brexit will be tricky for brands to navigate

Cynicism towards corporates will make it challenging to break any bad news to the public

With ONS data indicating that there has been a slowdown in business investment since the referendum, many businesses appear to expect that they will need to break bad economic news to the public in the coming years. With this in mind, we explored reactions to a series of different economic news stories related to Brexit that occurred during the lifecycle of the study – in the last few months alone, we have seen announcements ranging from the price of Marmite going up to cosmetics company Lush offering to move its EU staff to an office in Germany. This research revealed that different types of economic news attract different reactions.

Price increases

Price increases are viewed with scepticism by all four of the Brexit segments. We tested reactions to news about price rises on certain Marmite and Nescafe products, which had been explicitly blamed on Brexit in both cases. These price rises were widely seen as opportunist, with the (perceived) justifications for these seen as barely credible by all audiences. Many members of the public cynically say that such behaviour is “typical” of large 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.”

Price increases are viewed with cynicism by all segments
Job news

Job news, in contrast, is often viewed in a more sanguine way. We analysed responses to announcements made by Vodafone and HSBC about moving jobs out of the UK. Many Diarists attributed this news to wider global economic forces, unrelated to Brexit – these are frequently viewed with a sense of resignation and powerlessness. The news is therefore not generally seen as particularly concerning, and many associate this behaviour with being a “savvy business”. Some die-hards think that the UK is best off without “foreign” businesses, often conveying a sense of bloody-mindedness in the way that they talk about this. And while both Remain segments (devastated pessimists and accepting pragmatists express concern about job losses, Leave voters rarely appear 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."

Job news is viewed in a more sanguine way
**Immigration and the NHS**

The final news story that we tested touched on two sensitive issues for the UK public, namely immigration and the NHS. The interaction of these key concerns played out differently by segment:

- For both **die-hards** and **cautious optimists**, concerns about immigration currently outweigh any concerns about the NHS – they see opportunities for UK nurses in the fall of the number of EU nurses registering to work in the UK, allowing them to “get their jobs back”;
- NHS and immigration concerns cancelled each other out for **accepting pragmatists**, who think that there could be positive outcomes from this news (or at least are hoping for the best result);
- **Devastated pessimists** focus on the perceived severe implications for the NHS, which far outweigh any concerns that they may have regarding immigration. Many believe that this will place greater strains on services.

*Immigration and the NHS interact in different ways for different segments*
Insight 4: A good deal of expectation

Public expectations on life after Brexit are sky-high, even if people are relatively sanguine about the prospect of getting a good deal from the EU

As part of our research, we asked our Diarists what a “good deal” would look like for the EU and also what a “bad deal” would look like.

For Leave voters, the feedback was unequivocal – unsurprisingly, sovereignty and immigration are central to their expectations. On immigration, it is difficult to overstate just how high expectations are – many express a desire for immigration to drop to zero or “as low as it can possibly go”. On sovereignty, Leave voters see a good deal as involving a complete return of power to Westminster – any deal that involves either the UK paying into the EU or British citizens being asked to “obey rules that they don’t agree with” will be seen as a failure.

Unsurprisingly, sovereignty and immigration are key to Leavers’ expectations for a good deal

Trade is another important expectation for three of the four segments, although is largely absent from die-hards’ visions of a good deal. Indeed, these voters are likely to reject the EU entirely and focus any mention of trade on the rest of the world. For cautious optimists, however, trade is still important and they want to maintain good relationships with EU member states. This does not mean that membership of the Single Market is important to Leave voters – this was almost exclusively mentioned by Remain segments in our diaries.
Although “freedom of movement” is mentioned by some Remain voters in relation to a good deal – and rarely by Leave voters except in the context of immigration – 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, and in some cases this also reflects a desire to have the ability to work in the EU in the future.

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

Voters on both sides of the divide are relatively sanguine about the prospects of getting a good deal from the EU – they rate it as less than 5/10 likelihood that the UK will succeed in getting a good deal. Despite this, many voters have very high expectations for life after the EU (distinct from any deal that the UK may or may not get). The Government’s strategy to date has been to feed these expectations rather than manage them – time will tell whether this has any cost if these sky-high expectations are not met.

Expectations for life after Brexit are sky-high
Regardless of specifics about a deal, the notion of greater “control” upon leaving the EU is pervasive – voters of all stripes (with the exception of devastated pessimists, who reject this idea entirely) believe that the UK will achieve this with its departure from the EU, whether in terms of sovereignty, immigration or trade. The recall and resonance of this key Leave slogan goes a long way to explaining last year’s referendum result.

"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.”

“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.”

“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.”

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

Expectations of greater “control” after Brexit are widespread
Insight 5: Elites still think very differently from the public

The British public’s attitudes towards Donald Trump highlight the gulf between the “man on the street” and the Westminster elite

One of the key lessons from last year’s seismic political events was that the general public (in both the UK and the USA) often have a very different perspective from those who are inside the political “bubble” on a regular basis.

Our Brexit Diaries has confirmed the importance of this conclusion, with attitudes towards Donald Trump perhaps the best example of this trend.

It is undoubtedly true that many British people find Donald Trump objectionable as a person – many Diarists, of all political stripes, express distaste for his personality traits and reacted strongly to the idea of a proposed state visit to the UK.

<table>
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<tr>
<th>On him:</th>
<th>On a proposed visit to the UK:</th>
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<td>“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.”</td>
<td>“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.”</td>
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Many Brits find Trump an objectionable person
At the same time, many think that he is a savvy businessman – based on perceptions of a long record of success in business and, for some, on his portrayal in *The Apprentice USA*. This has a knock-on effect politically, in that many think Trump’s policies could work.

"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."

**But they also think that he is a savvy businessman**

The most striking example of this is on his proposed travel ban on those from certain (predominantly Muslim) states, which was met with widespread revulsion by many in the British political and media establishment. While they may have misgivings about the tone of Trump’s announcements on this, many in three of our four Brexit segments believe that this measure represents a potentially effective response to a serious and difficult challenge that the USA faces.

"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."

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

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

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

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

**The Trump travel ban appeals to three of the four Brexit segments**

Donald Trump appeals because he is seen to talk sense and not to be trapped by the “PC brigade”, as one of our Diarists put it. This has clear parallels with Brexit and also with the ongoing French presidential election campaign.

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

"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."

Trump appeals because he is seen to say (and do) what others are afraid to
Methodological note

The qualitative data are based on research conducted online with 100 members of the public living in ten locations across the UK – Glasgow, Belfast, Sunderland, Leeds, Manchester, Kings Lynn, Stoke, St Austell, Cardiff and London. This research was conducted between the start of January and late March 2017.

The quantitative data is based on a poll conducted online between 17th and 19th March 2017, where BritainThinks surveyed 2062 GB adults aged 18+. Data were weighted to be representative of all GB adults by factors including age, gender, region and socio-economic grade. The results are outlined below.

Q. Last year the United Kingdom voted to leave the European Union, in a referendum on 23rd June 2016. Thinking about this referendum, which of the following comes closest to describing your viewpoint?

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<th>Statement</th>
<th>GB adults</th>
<th>Segment</th>
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<tr>
<td>I am pleased about the result and have no significant concerns about</td>
<td>37%</td>
<td>Die-hards</td>
</tr>
<tr>
<td>leaving the EU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am pleased about the result but have some significant concerns about</td>
<td>16%</td>
<td>Cautious optimists</td>
</tr>
<tr>
<td>leaving the EU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am disappointed about the result but can see some significant positives to leaving the EU</td>
<td>14%</td>
<td>Accepting pragmatists</td>
</tr>
<tr>
<td>I am disappointed about the result and can see no significant positives to leaving the EU</td>
<td>30%</td>
<td>Devastated pessimists</td>
</tr>
<tr>
<td>None of these</td>
<td>4%</td>
<td>None</td>
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About BritainThinks

At BritainThinks, we provide our clients with the insight they need to make better decisions. But we don’t stop at insight. We give you the strategic counsel you need to achieve your goals. Our advice is always delivered with honesty and integrity – even when it is hard to hear. Every challenge is unique. So we approach each with the fresh thinking it deserves. Working collaboratively with our clients, we build strong and lasting relationships.

Founded in 2010, we are one of the UK’s leading insight and strategy consultancies, working with a wide array of clients from the public, private and third sectors.

About the authors

Spencer Livermore is a Partner at BritainThinks. He has twenty years’ experience advising multinational companies and senior leaders on their reputation and communication challenges. At BritainThinks he works with clients to help them gain greater clarity on their strategic direction. He was previously Director of Strategy at business reputation consultancy Blue Rubicon, where he built and had Board responsibility for their strategic consulting division. He has also worked as Senior Strategist at advertising agency Saatchi & Saatchi.

Prior to working in business, he served in government for ten years, in the Treasury as Chief Strategy Adviser to the Chancellor of the Exchequer, and then in 10 Downing Street as Director of Strategy to the Prime Minister. He was also a senior adviser on four General Election campaigns. Spencer is a member of the House of Lords, where he sits on the Economic Affairs Select Committee. He is a Visiting Senior Fellow in media and communications at the London School of Economics, and a Research Fellow at Queen Mary University, London.

Tom Clarkson is an Associate Director at BritainThinks, having recently joined from ComRes, where he led the Corporate Research Team. In addition to leading the Brexit Diaries research, Tom has extensive experience of conducting research to understand public attitudes towards the UK’s relationship with the European Union, having led detailed studies on this area for an array of political parties, world-leading private sector companies and other campaigning organisations.
Further information

We would be very happy to discuss this research and its implications at any stage. For further information, please do not hesitate to contact us:

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