

What **UK**
Thinks **EU**

WHAT DO VOTERS WANT FROM BREXIT?

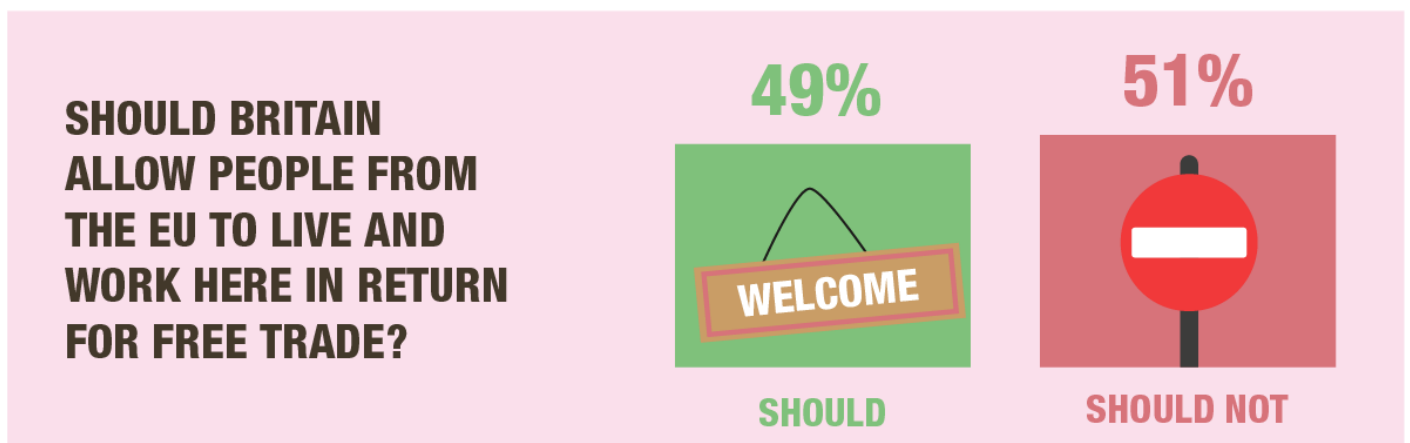
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What Do Voters Want from Brexit?

Nine in ten people would like free trade with EU countries to continue. But at the same time, as many as seven in ten (70%) think the UK should be able to limit the number of people from the EU who come here to live and work, including 55% of people who voted to remain in the EU.



The public is split over whether Britain should accept freedom of movement of people in exchange for free trade with EU countries. This split is even clearer when we look at those who voted to remain in the EU and those who voted to leave.



INTRODUCTION

The decision of a majority of those who voted in the referendum on Britain's membership of the European Union (EU) to back leaving the institution has presented the government with the task of negotiating the UK's exit. The Prime Minister has signalled that she proposes to notify the EU formally of the country's intention to leave by the end of March next year, although whether the government will be able to do so without first securing parliament's approval is currently the subject of a dispute in the courts. However, so far the government has given little indication of what kind of relationship with the EU it is seeking to obtain other than suggesting that it is looking to retain as much tariff-free access to the EU single market as possible while at the same time securing some ability to limit immigration to the UK from the EU.

As a result, an intense debate has now ensued about what kind of relationship the UK government should be seeking to secure. That debate has become widely characterised as being between those who advocate a 'soft' Brexit and those who envisage a 'hard' one. Those in the former group wish to maximise the strength of the ties between the UK and the EU, and especially the economic bonds. They look to see the UK remain a member both of the tariff-free single market and of the customs union that ensures the free passage of goods within that market. The latter group, in contrast, would prefer a looser relationship that would allow the UK to decide for itself with whom it has free trade agreements and which would permit the UK to determine for itself who should and who should not be allowed to come from abroad to live and work.

Inevitably, advocates on both sides of this debate have argued that their stance better represents what a majority of voters would like to see happen in the wake of the Brexit vote. However, relatively few attempts have been made to ascertain where public opinion actually stands on the issue, and certainly very few have done so in any depth (though Wells, 2016 is a notable exception). Meanwhile those that have addressed the subject have primarily focused on what is often thought to be the crucial choice facing the UK - between retaining full access to the single market and being able to limit the right of EU citizens to come to the UK to live and work. This approach, though, is to assume that this is the way that the public regard the issue, while in practice the results of such polls have proven contradictory. Some have suggested that a clear majority prioritise access to the single market, while others suggest more are concerned to be able to limit immigration (Curtice, 2016a). Against this backdrop it is perhaps not surprising that advocates on both sides of the Brexit debate have sought to base their arguments on what they claim were the principal motivations voters brought to the ballot box when they narrowly voted to Leave in the referendum (Curtice, 2016b).

In this paper we present the results of an exercise designed to help fill this gap in our knowledge of public opinion on what Brexit should mean. We report on how a representative sample of voters responded between mid-September and mid-October to a wide range of questions on what they would like to be included in the agreements that will now have to be negotiated between the UK and the EU. We do so not from the perspective of the potential negotiator but rather of the ordinary citizen. For example, we did not just look at what people make of the twin pillars of free trade and freedom of movement, but also at aspects of the relationship between the UK and the EU that can have a direct impact on people's lives - such as the cost of mobile phone calls made abroad and whether people have to pass through customs when travelling between the UK and the EU. Moreover, in looking at some of the more complex issues that are likely to be at the centre of the negotiations, we have tried to use everyday language that does not assume that people necessarily know what is meant by such terms as 'free trade' and 'freedom of movement'. Above all, we do not presume that people necessarily recognise some of the trade-offs with which the UK may be faced when it does eventually give the EU notice that it wishes to leave - though as will be seen the survey does bring evidence to bear on that issue too.

THE DATA

Our evidence comes from a new method of conducting a survey that has been developed by NatCen during the last year and which is currently unique in the UK. The respondents to the survey were originally interviewed as part of the 2015 British Social Attitudes (BSA) survey. BSA is a high quality survey in which a random sample of people are interviewed face to face. All who participated in this survey were asked whether they were willing in future to answer further (short) surveys, either via the internet or over the phone. Of the 4,328 people who were interviewed for the BSA survey, some 2,783 said they would be willing to be recontacted in this way. The panellists have since been invited to participate in a number of follow-up surveys, including one conducted between mid-May and mid-June on how they might vote in the then forthcoming EU referendum (Cabrera-Alvarez et al., 2016). Now we have contacted them once again to ascertain what they think Brexit should mean. A total of 1,391 people were interviewed between 22 September and 24 October, mostly via the internet but in 278 cases by phone, the latter group consisting of respondents who were unwilling or unable to answer via the internet. This represents a response rate of 54% amongst the 2,594 panellists who were invited to complete the survey.

This design is unique in two ways. First, in contrast to all commercial internet polling in the UK, the respondents were originally chosen for interview at random. They do not comprise people who in some way or another have 'volunteered' to join a panel of people willing to take part in polls, as is common practice in internet polling in the UK. This should help to make them representative of the country as a whole. Second, as we have already noted, unlike most opinion polls where interviewing is concentrated in a couple of days or so, interviews were conducted over a whole month. Those who initially failed to respond were repeatedly recontacted, including where necessary by phone. Such an approach is uncommon amongst polls in the UK but evidence both from the UK general election and from before the EU referendum suggests that it helps to improve the representativeness of a sample (Curtice, 2016c; Cabrera-Alvarez et al., 2016).

That said, as might be expected given that not everyone agreed to join the panel in the first place and given too that not all those who did agree to join participated in this particular round of interviewing, our sample of respondents is not perfectly representative. However, we can ascertain how much this is a potential problem from the extensive information that both they and those who did not respond to this latest interview gave in their initial BSA interview. Thus the results reported here are those obtained after weighting the data to correct for both differential non-response to this particular survey and for differential willingness to join the panel in the first place, while also taking into account the pattern of non-response to the original BSA survey. Further details of this procedure are to be found in Cabrera-Alvarez et al. (2016).

We do, of course, also have an important way of assessing the representativeness of our sample after this weighting has been applied. This is to compare how people said that they voted in the referendum with the actual result of the ballot on June 23rd. So far as vote choice amongst those who said they had voted is concerned, the sample proves to be very close to the result indeed; 51% said that they voted to Leave, 49% to Remain, just one point adrift from the actual result of 52% for Leave and 48% for Remain. The panel proves to be so accurate despite the fact that when we interviewed its members before the referendum, 52% indicated that they were inclined to vote to Remain, and only 48% to Leave (Cabrera-Alvarez et al., 2016). That said, we should note that, at 83%, the proportion who claim to have voted is somewhat higher than the official turnout figure of 72%. Still, all in all, there is every reason to believe that the views of the respondents to our survey are broadly representative of the public at large on the question of Europe, and especially so of those who actually voted on June 23rd.

A SOFT BREXIT?

Included in the survey were questions about 12 possibilities that might be included in or flow from the agreement to be negotiated between the UK and the EU. These possibilities were introduced to respondents as follows:

Following the decision to leave the European Union, the UK will have to negotiate a new agreement with the EU. For each of the following things, to what extent would you be in favour or against it being part of that agreement?

In each case respondents could respond by picking one of the five following answers:

Strongly in favour

Somewhat in favour

Neither in favour nor against

Somewhat against

Strongly against

Of the questions that were included on the survey, half referred to possibilities that might be regarded as pointing towards a 'hard' Brexit, while half did so to options that are more often characterised as integral to a 'soft' Brexit. The two sets of questions were interspersed with each other on the questionnaire (see Appendix B for details), so that it was not made easy to respondents simply to agree with the 'soft' options and disagree with the 'hard' ones – or vice-versa. However, here we will look at them separately, reporting first of all on the six 'soft' Brexit items before turning to the six 'hard' Brexit ones.

Our six 'soft' Brexit items were as follows:

Allowing all EU citizens who are already living in the UK to remain here

Allowing banks located in EU countries to provide services to people living in Britain while allowing British banks to provide services to people living in the EU

Britain continuing to follow EU regulations on the cost of mobile phone calls made abroad

Requiring British firms to comply with EU regulations on the design and safety of all the goods that they make

Allowing companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU

Allowing boats from the EU to fish in British waters in return for allowing British boats to fish in EU waters

Some of the items are more straightforward than others. The first refers to whether EU citizens who are already living and working in the UK should continue to be allowed to do so (by implication, irrespective of whatever rules are in place for new migrants from the EU). Meanwhile the third item is intended to see whether, after leaving the EU, the UK should continue to follow EU regulations that mean that roaming charges for making and receiving mobile phone calls while abroad are gradually being phased out, as indeed are additional charges for using data services via a smartphone.

The second item, in contrast, refers to what is for most people a more remote issue, but one which is of particular interest to those working in financial services in the UK. This is whether banks and other financial institutions regulated in the UK will continue to be able to provide financial services across the EU, a practice known as 'passporting'. If that right were no longer to exist, financial institutions that wish to operate in the EU might have to establish a base in another EU state, with potential implications for the size of the industry in the UK. Important though this may be, however, it is not an issue with which most voters will be immediately familiar, and thus our question tries to spell out what is entailed in relatively everyday language.

Equally, as noted earlier, it is perhaps unwise to assume that people will necessarily understand terms such as 'free trade' or a 'single market' and thus our fifth item refers to the possible continuation of the UK's current level of access to the single market without using either of these terms. Meanwhile, membership of the single market implies an acceptance of EU regulations on the manufacture of goods, and thus the fourth item addresses whether the UK should continue to implement those regulations (including, by implication, for goods sold at home as well as those marketed elsewhere in the EU). Finally, our sixth item refers to the EU's Common Fisheries Policy (CFP), one of the key features of the EU under which access to national waters is pooled across the EU and the total amount of fishing allowed in any area regulated. The UK's fishing industry is relatively small nowadays (in the view of some as a result of the CFP), but the policy has regularly been the subject of controversy in debates in Britain about the EU.

Table 1: Attitudes towards Possible Contents of a 'Soft Brexit'

| | In Favour | Neither | Against |
|----------------------------|-----------|---------|---------|
| | % | % | % |
| Free trade | 90 | 8 | 2 |
| Allow EU citizens to stay | 76 | 12 | 12 |
| Comply with EU regulations | 65 | 20 | 15 |
| Allow Bank passporting | 63 | 29 | 6 |
| Common fisheries | 60 | 17 | 22 |
| Mobile phone calls | 45 | 35 | 18 |

In truth there is little sign here of marked voter hostility to any of these possible components of a 'soft' Brexit (see Table 1). (Full details of the pattern of responses to all of the questions in the survey are to be found in Appendix A.) None of them are opposed by many more than one in five, with staying in the CFP seemingly the most contentious. Meanwhile, it seems that there is almost universal support for maintaining free trade between the UK and the EU. Evidently there is no wish to put up tariff barriers in order to stop companies in the EU being able to export to the UK – so long at least as the move is reciprocated by the EU. Indeed, although EU regulation is sometimes mocked via myths such as an alleged insistence on 'straight bananas' and on calling sausages 'offal tubes' (BBC, 2007), nearly two-thirds of voters are in favour of continuing to follow EU regulations on the design and safety of goods; safety is, after all, something that is widely valued.

Whether existing EU citizens should be allowed to remain in the UK is one topic that a number of specific opinion polls have addressed (see, for example, BMG Research, 2016). Not least of the reasons why they have done so is that there has been some criticism of a reluctance by the UK government to guarantee their right to remain in advance of the Brexit negotiations (The Spectator, 2016; Watts, 2016). With around three in four saying they should be able to remain, our survey echoes the finding of all of these previous polls that there is very substantial support for allowing EU citizens to stay in the UK.

In contrast, and perhaps rather surprisingly, rather less than half (45%) say that they are in favour of following EU regulations on the cost of mobile phone calls made abroad; this is one subject on which a relatively large proportion – slightly more than a third – opted to sit on the fence. Perhaps if we had mentioned the possible implication that such calls would be cheaper, there might have been rather greater enthusiasm for the idea. Even so, the figures are perhaps an indication that some voters may not identify the action the EU has taken in this area with cheaper mobile calls.

Overall then, there is little sign that the contents of a possible 'soft' Brexit are contentious. Its central pillar – tariff-free trade with the EU – is almost universally supported. The financial world's principal demand, passporting, is widely acceptable. A majority are apparently in favour of remaining in the CFP, even though few have suggested that would likely be part of a post-Brexit deal. But on its own this is insufficient evidence on which to conclude that the public would prefer a 'soft' Brexit to a harder one. We need also to look at how the public react when faced with options that are widely regarded as pointing in the direction of a 'hard' Brexit.

A 'HARD' BREXIT?

We asked respondents about the following options that might be regarded as the possible components of a 'hard' Brexit:

No longer allowing people from EU countries who are visiting Britain to get NHS treatment for free

Ending the ability of the EU to decide the maximum number of hours people in Britain can be expected to work

Britain imposing a limit on the number of people from the EU who can come here to live and work

Requiring people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU

Reintroducing customs checks on people and goods coming to Britain from the EU

Introducing passport checks on people travelling between the UK and the Republic of Ireland

Two of these items, the third and the fourth, refer to the issue that is widely thought to have been the foundation of the majority vote for Leave in the referendum – immigration. In the first of these two items respondents were simply presented with the idea of Britain being able to impose a limit on the number of EU citizens who come to the UK to live and work. Under this scenario, however, EU citizens might still find it easier than those from outside the EU to secure admittance to the UK. The second of these two items assesses whether people do in fact believe that this should be the case by asking whether EU citizens should have to apply to live and work in the UK on the same basis as those from outside the EU - with the implication that anyone from the EU seeking to reside permanently in the UK would have to acquire a visa.

Meanwhile, because the UK has never signed up to the Schengen Agreement, those entering the UK from another EU country are still subject to passport checks at the UK border. The one exception comprises those entering via the Republic of Ireland, which along with the UK, the Channel Islands and the Isle of Man has been part of a Common Travel Area ever since shortly after the foundation in 1922 of the Irish Free State (albeit the arrangement was suspended during the Second World War and for a while afterwards). One implication of this has been that Ireland has been required to implement a similar immigration policy to that of the UK (while it also is not a member of the Schengen Agreement). However, the immigration policy of the two countries might begin to diverge if the UK were no longer to uphold the freedom of movement provisions of the European Union, in which case entering via Ireland might be regarded as a ‘backdoor’ route into the UK. We therefore might anticipate that voters who wish to see immigration reduced would back the introduction of passport controls between the UK and the Republic of Ireland. Thus, the presence of the sixth item on our list.

As a member of the EU, the UK is not only a member of the single market in goods and services, but also of the customs union whereby goods can travel freely within the EU (and the associated members of the customs union including Turkey) while those coming from outside the EU are subject to a common tariff. The most immediate consequence of the customs union for ordinary voters has been that since 1993 there have not been any customs checks on people coming into Britain from the EU (and vice-versa). We have thus tried to address this issue by asking respondents about the reintroduction of customs checks, as in the fifth in our set of ‘hard’ Brexit items.

For some in the labour movement, at least, one of the features of the EU that they particularly value is the labour market regulation that it has introduced which gives certain rights to workers. Perhaps one of the better known of these provisions is the Working Time Directive, which, inter alia, stipulates a maximum 48 hour working week. Our second item is intended to ascertain whether voters believe that the UK should no longer continue to implement such a regulation. Meanwhile, the EU also guarantees those of its citizens who are visiting an EU country other than their own access to emergency medical care on the same basis as citizens of that country. Although the cost of providing such treatment can, in principle at least, be recouped by the NHS from the citizen’s home country, it means, for example, that EU visitors to the UK can access NHS treatment at no cost to themselves. Our first item asks people whether they would like this arrangement to end.

Table 2 Attitudes towards the Possible Contents of a ‘Hard’ Brexit.

| | In Favour | Neither | Against |
|---------------------------------------|------------------|----------------|----------------|
| | % | % | % |
| Treat EU and non-EU migrants the same | 74 | 12 | 13 |
| Customs checks | 71 | 14 | 16 |
| Limit EU migration | 70 | 12 | 18 |
| End free NHS treatment | 62 | 12 | 25 |
| End maximum working hours limits | 53 | 22 | 24 |
| Passport checks between UK & Ireland | 45 | 25 | 29 |

Table 2 shows that there is considerable support for many of these steps. Seven in ten wish to see a limit placed on migration to the UK from the EU, while even slightly more are attracted by the idea that potential EU migrants should be treated in the same way as those from outside the EU. These figures imply that there is relatively little public enthusiasm for adhering to the current freedom of movement provisions of the EU, although less than half support (though only around three in ten actually oppose) introducing passport checks between the UK and Ireland. Equally around seven in ten also support the reintroduction of customs checks, and thus by implication leaving the EU customs union.

Meanwhile, just over three in five would like to end the right of EU nationals to be able to secure emergency treatment for free under the NHS, a finding that echoes previous BSA research (Curtice, 2016d) (though perhaps we should note that the question did not spell out the possible implications of such a step for UK citizens in need of health care in the rest of the EU). Equally, as we have also previously found on BSA, over half back ending the EU regulation of working hours, though support for doing so is lower than it is in respect of opting out of the freedom of movement provisions.

Far from clearly supporting a ‘soft’ Brexit, there is considerable support amongst voters in Britain for measures that would imply a ‘hard’ Brexit, most notably in respect of immigration and membership of the customs union. The lesson would appear to be that while voters embrace the idea of maintaining free trade with the EU, including adhering to the regulatory requirements that might flow from such a relationship, at the same time they reject the idea of an open border with the rest of the EU, both in respect of people and of goods. While it may be the case that the EU believes that freedom of movement and free trade go together much like love and marriage were once thought to do, this is evidently not the way in which the average voter in the UK sees the situation.

AND IF THERE HAS TO BE A CHOICE?

Still, even if voters in the UK would prefer to keep free trade while ending freedom of movement, perhaps in the end achieving one of these matters more to them than the other. If so, we might

have a clear steer as to what kind of Brexit they would like to see should the UK ultimately be required by the EU to choose between free trade and immigration control. Anticipating the relative popularity of free trade, we decided to try and address this issue by asking voters whether they would or would not be willing to accept freedom of movement if that were necessary for the UK to retain access to the single market. The question, which was asked after respondents had answered the questions we have already examined, read as follows:

It has been argued that when Britain leaves the EU, British firms will only be allowed to continue to sell goods and services freely to people in the EU if people from the EU are still free to come here to live and work.

Do you think Britain should or should not allow people from the EU to freely come here to live and work in return for allowing British firms to sell goods and services freely in the EU?

Definitely should allow people from the EU to come here to live and work

Probably should allow people from the EU to come here to live and work

Probably should not allow people from the EU to come here to live and work

Definitely should not allow people from the EU to come here to live and work

Table 3 Attitudes towards allowing EU freedom of movement in return for UK access to free trade

| Allow people from EU freely to come and live and work in return for allowing UK firms to trade freely with the EU? | % |
|---|----------|
| Definitely should | 21 |
| Probably should | 28 |
| Probably should not | 29 |
| Definitely should not | 22 |

Table 3 reveals that when addressed in this way the issue divides voters almost evenly down the middle. While 49% say the UK definitely or probably should agree to freedom of movement if that was necessary to securing continued unfettered access to the EU single market, 51% say that it definitely or probably should not – a result that reflects almost perfectly the balance of support for Remain and Leave in the referendum. As we noted earlier, previous attempts by opinion polls to ascertain the balance of opinion on this issue have produced divergent results, a consequence in part at least of differences in the way in which the choices were described to respondents. This divergence includes some polls that have found opinion to be quite evenly balanced (Curtice, 2016x). Our evidence here suggests that the safest summary of the public’s position does indeed appear to be that voters are probably quite evenly divided on the issue. If so, the choice is likely to prove politically a difficult one for the UK government to make.

REMAIN AND LEAVE VOTERS

So far we have looked at the attitudes of voters as a whole. But perhaps those who voted to Leave have a very different view from those who voted to Remain of the kind of Brexit they think should be introduced. Given that Leave voters proved to be the majority in the referendum, it might be thought that more weight should be given to their views during the development of the UK government's stance in the negotiations. It is, after all, their 'mandate' that the government is meant to be trying to fulfil. On the other hand, if there are some options where voters on the two sides are largely in agreement with each other, it might be thought that a government that is seeking to heal some of the divisions exposed by the EU referendum would want to give those options a particularly high priority.

To address this question we first of all in Table 3 compare the proportion of Remain and Leave voters who say they are in favour of each of the options that we have suggested might be part of a 'soft' Brexit. As perhaps we might anticipate, for the most part those who voted to remain in the EU are rather keener on these options than are those who voted to leave. Indeed, all of our 'soft' Brexit options were backed by a majority of those who voted Remain. Even so, it seems that many a Leave voter is also happy to accept that these options should be part of the deal that the UK makes with the EU. Only in the case of following EU regulations on the cost of mobile phone calls do less than half of those who voted Leave back the idea, and even then the proportion in favour (36%) is still larger than the proportion who are actually against (24%). It can hardly be said that the inclusion of any of these options in the agreement that is eventually made between the UK and the EU would seriously compromise the wishes of those who actually voted to leave the EU. Meanwhile, we might note in particular that, other things being equal at least, Leave voters are almost as keen as Remain supporters to retain tariff-free trade with the EU.

Table 4 Support for the Possible Contents of a 'soft' Brexit by Referendum Vote

| % in favour of | EU Referendum Vote | |
|----------------------------|--------------------|-------|
| | Remain | Leave |
| Free trade | 94 | 90 |
| Allow EU citizens to stay | 90 | 68 |
| Comply with EU regulations | 80 | 55 |
| Allow Bank passporting | 72 | 57 |
| Common fisheries | 70 | 50 |
| Mobile phone calls | 57 | 36 |

But while Leave voters are generally less keen than Remain supporters on the options that might form part of a 'soft' Brexit, they are more likely to back those options that might be included in a 'hard' Brexit. Indeed, all of our 'hard' Brexit options secure support from a majority of those who voted to Leave, while they appear to be particularly keen on limiting migration and the reintroduction of customs checks. We might note in particular that Leave supporters appear to be almost as keen on restrictions on migration as Remain supporters are on maintaining tariff-free access to the single market. Nearly nine in ten (89%) Leave supporters think that EU migrants

should be treated in the same way as those from outside the EU, only a little below the 94% of Remain supporters who wish to retain tariff-free trade with the EU.

However, support for measures that might be expected to reduce migration is not unique to those who voted to Leave. Even amongst Remain supporters, over half are in favour of limits to EU migration and of treating EU migrants in the same way as those from outside the EU. Moreover, despite their enthusiasm for tariff-free trade and thus, by implication, continued access to the single market, over half of Remain voters also back the reintroduction of customs checks. In fact of all the ‘hard’ Brexit options that we canvassed, only in the case of the introduction of passport checks for travellers between the UK and Ireland do opponents of the measure amongst Remain voters (43%) outnumber supporters (33%). Just as many of the possible contents of a ‘soft’ Brexit apparently do not offend the sensibilities of a considerable body of Leave voters, so also is it the case, it seems, that many aspects of a ‘hard’ Brexit would not necessarily be unwelcome to Remain supporters.

Table 5 Support for the Possible Contents of a ‘Hard’ Brexit by Referendum Vote

| % in favour of | EU Referendum Vote | |
|---------------------------------------|--------------------|-------|
| | Remain | Leave |
| Treat EU and non-EU migrants the same | 62 | 89 |
| Customs checks | 55 | 85 |
| Limit EU migration | 55 | 85 |
| End free NHS treatment | 48 | 75 |
| End maximum working hours limits | 41 | 65 |
| Passport checks between UK & Ireland | 33 | 57 |

In short, the apparently widespread wish amongst the British public to remain part of the single market in goods and services but to opt out of the obligations the EU’s freedom of movement provisions is not confined to those who voted to Leave. It is also to be found amongst many who voted to Remain. Such a deal would, it seems, be backed by a majority of voters on both sides of the referendum.

But, as we have already noted, many political leaders in the EU have indicated that this is one deal that will not be on offer to the UK when the negotiations take place. If the UK wishes to retain its place in the single market, it has been argued, it will have to accept freedom of movement. And, as we have already seen, if the UK were to be faced with this choice, overall public opinion in the UK would be divided down the middle. Does this mean, therefore, that the key difference between the outlook of Remain and Leave voters is that Remain voters would ultimately prioritise single market access while Leave voters reckon that being able to control immigration is more important?

Table 6 Attitudes towards allowing EU freedom of movement in return for UK access to free trade by Referendum Vote

| | EU Referendum Vote | |
|--|--------------------|-------|
| | Remain | Leave |
| Allow people from EU freely to come and live and work in return for allowing UK firms to trade freely with the EU? | % | % |
| Definitely should | 34 | 10 |
| Probably should | 36 | 20 |
| Probably should not | 21 | 34 |
| Definitely should not | 8 | 36 |

This is, indeed, largely the case. As Table 6 shows, 70% of Remain voters think we should definitely or probably allow people from the EU to come to the UK to live and work in return for allowing British firms to trade freely within the EU. Conversely, 70% of Leave supporters take the opposite view. Attitudes on the two sides of the referendum divide are symmetrically opposed to each other. The more difficult the UK government finds it to secure free trade and some limitation on immigration, the less likely it is that it will emerge with a deal that proves capable of satisfying both Remain and Leave voters.

PARTY DIFFERENCES

On the timetable for withdrawal from the EU proposed by the Prime Minister, the next general election will take place a little more than a year after the UK leaves the European Union. Voters' perceptions of the merits of the deal that the government secures with the EU could thus well play an important role in how they decide to vote in that ballot. As a result, the government may want to be particularly sensitive to the kind of deal that Conservative supporters would like to see. Equally, the Labour party will have to decide what position it takes on the kind of deal that the UK should secure, including during whatever opportunities there eventually prove to be for parliamentary scrutiny of the negotiations. It may wish to prioritise those issues which are of particular concern and interest to Labour voters.

During the referendum itself, both the Conservatives and Labour found that their voters were divided between the Remain and Leave camps, albeit that the latter option was more popular amongst Conservatives than with Labour voters. In our survey, for example, 58% of those who would vote Conservative if there were a general election tomorrow voted to leave the EU, while only 42% voted to Remain. Conversely, 64% of Labour supporters backed Remain, while only 36% wanted to Leave. Thus we might anticipate that Conservative voters are more inclined than Labour supporters to favour a 'hard' Brexit (albeit neither would be expected to be as likely to adopt such an outlook as those who support UKIP, 99% of whose current voters say they voted for Leave). At the same time, however, given that they are usually more inclined than Labour voters to a more 'laissez-faire' approach to the management of the economy, we might anticipate that Conservative supporters are noticeably less keen on continued adherence to EU regulation than the continuation of free trade.

Table 7 shows the attitudes of current Conservative, Labour and UKIP supporters towards the possible components of a 'soft' Brexit. As we might anticipate, UKIP supporters are for the most part much less likely than their Conservative and Labour counterparts to support any of these options. Particularly striking is the much lower level of support amongst UKIP voters for allowing EU citizens already living in the UK to remain, albeit that as many as a half think that they should be able to do so. The one exception to the statement that UKIP supporters exhibit a lower level of enthusiasm for the possible components of a 'soft' Brexit is that they too overwhelmingly wish to maintain tariff-free trade with the EU.

Table 7 Support for the Possible Contents of a 'soft' Brexit by General Election Vote Intention

| % in favour of | General Election Vote Intention | | |
|----------------------------|---------------------------------|--------|------|
| | Conservative | Labour | UKIP |
| Free trade | 94 | 85 | 89 |
| Allow EU citizens to stay | 80 | 77 | 50 |
| Comply with EU regulations | 60 | 73 | 54 |
| Allow Bank passporting | 68 | 59 | 52 |
| Common fisheries | 59 | 69 | 46 |
| Mobile phone calls | 46 | 48 | 31 |

Meanwhile, although Labour voters may have been more likely to vote to remain in the EU, they are not always more supportive than Conservative voters of retaining close links with the institution. They are rather less likely to back the continuation of passporting arrangements for financial institutions, while they appear to be no more likely to support following EU regulations on the costs of mobile phone calls. On the other hand, Labour voters are more likely than Conservative supporters to want the UK to continue to follow EU regulations on the design and safety of goods as well as staying in the CFP. It would seem that the concerns of the financial world are less close to the hearts of Labour supporters even though they are otherwise relatively keen on retaining links with the EU.


Table 8 Support for the Possible Contents of a ‘Hard’ Brexit by Referendum Vote

| % in favour of | General Election Vote Intention | | |
|---------------------------------------|---------------------------------|--------|------|
| | Conservative | Labour | UKIP |
| Treat EU and non-EU migrants the same | 85 | 64 | 88 |
| Customs checks | 78 | 51 | 89 |
| Limit EU migration | 82 | 55 | 87 |
| End free NHS treatment | 72 | 47 | 82 |
| End maximum working hours limits | 65 | 38 | 67 |
| Passport checks between UK & Ireland | 47 | 41 | 65 |

Still, as Table 8 shows, Labour supporters are consistently less supportive than their Conservative counterparts of the potential contents of a ‘hard’ Brexit. Their reluctance to support ending labour market regulation such as the Working Time Directive is particularly marked (though even here the proportion who say they support such a step (38%) is still somewhat larger than the proportion who say they are against it (30%)). Nevertheless, even amongst Labour supporters between a half and two-thirds back steps that would be likely to limit immigration. Meanwhile, given the views expressed by Conservative voters, the UK government would appear to have every reason to want secure greater control over immigration, along with many of the other items in our set of ‘hard’ Brexit options, including terminating the EU’s role in labour market regulation.

Table 9 Attitudes towards allowing EU freedom of movement in return for UK access to free trade by Referendum Vote

| Allow people from EU freely to come and live and work in return for allowing UK firms to trade freely with the EU? | General Election Vote Intention | | |
|--|---------------------------------|--------|------|
| | Conservative | Labour | UKIP |
| | % | % | % |
| Definitely should | 11 | 34 | 3 |
| Probably should | 29 | 31 | 8 |
| Probably should not | 37 | 23 | 37 |
| Definitely should not | 23 | 12 | 52 |



Indeed, the relative importance of immigration in the eyes of Conservative supporters is confirmed when, as in Table 9, we examine their views on whether EU citizens should continue to be allowed to come to the UK to live and work in return for the UK continuing to have tariff-free access to the single market. As many as 60% of current Conservative supporters say the UK should definitely or probably not strike such a bargain, while only 40% believe that it should. Labour voters, in contrast, take the opposite view; nearly two-thirds (65%) agree that EU citizens should definitely or probably be allowed to come to the UK if doing so secures tariff-free access to the EU market, while only just over one-third (35%) say they definitely or probably should not. If at some point the UK government does manifestly prioritise controlling immigration over the maintenance of free trade, it should not be surprised if the Labour opposition decides it is seeking the wrong bargain.

CONCLUSION

It would appear that the debate about whether the public would prefer a 'soft' or a 'hard' Brexit has been at risk of being based on a false premise. Rather than wanting one or the other, a majority of voters apparently want both. There is overwhelming support for retaining tariff-free access to the EU's single market, including an apparent willingness to retain EU regulations on the design and safety of manufactured goods. Most voters are also seemingly happy for financial institutions to retain their passporting rights in the EU. Yet at the same time a clear majority of voters want the UK to be able to limit migration from the EU, and maybe even treat EU citizens who wish to come to the UK in much the same way as potential migrants from outside the EU. They also embrace the idea of reintroducing customs checks and thus, by implication, not remaining a member of the EU's customs union.

Moreover, this perspective appears to be shared by a majority of both Remain and Leave voters. True, the possible components of a 'soft' Brexit are in general more likely to be endorsed by Remain voters, and those of a 'hard' Brexit by Leave supporters, but it would appear that a majority of both groups back keeping free trade and support options that would enable the UK to have greater control over immigration. Voters in both camps want both rather than one or the other, and thus the closer the UK government can get to securing both, the greater the chances that its efforts will be endorsed by voters.

Conversely, the more the UK is required by the EU to make a choice between keeping free trade and ending freedom of movement, the more difficult it will be for the government to emerge from the negotiations politically unscathed. Voters as a whole are evenly divided on whether ending freedom of movement should be abandoned in exchange for keeping free trade, while Remain and Leave voters take very different views on the issue. Meanwhile, the government faces an opposition whose electorate to some degree at least prioritises free trade whereas its own voters are inclined towards giving priority to acquiring the right to limit immigration. That divergence makes it more likely that the issue could easily prove a bone of contention in Parliament. But maybe the government will decide that from its perspective it would be better to follow the views of a majority of its supporters rather than do what David Cameron did - which was to take on his party, and lose.

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