

The EU Referendum – Where the UK Stands Today

“Should the United Kingdom remain a member of the European Union?”

In our latest poll of 5,000 respondents, conducted between 29th June and 6th July, “Yes” lead “No” in the referendum voting intentions by 45% to 37%. While 18% of likely voters are currently undecided. Leaving aside the undecided voters for now, if the referendum were held today the result would be expected to be:

Yes – 54.4%

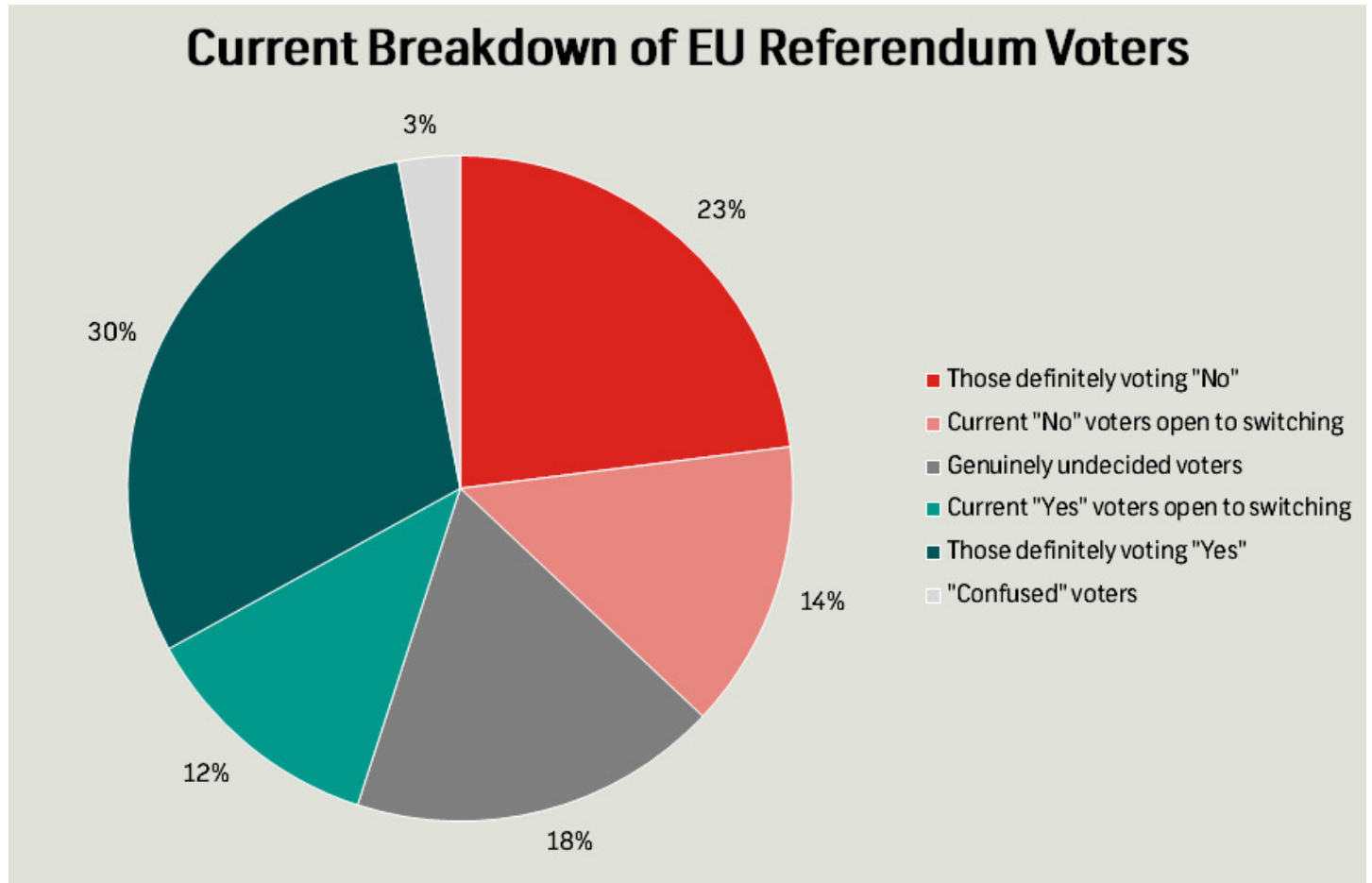
No – 45.6%

This is an 8.8 point lead for “Yes”; about 2 points smaller than the margin of victory for “No” in the Scottish Independence Referendum 2014.

However, this was a question about a referendum today. Of course, in reality the referendum will take place in a different context, after an attempted renegotiation of the UK’s terms of membership.

We therefore asked those who said they would vote “Yes” or “No” if they would definitely vote that way or whether they might consider switching based on the outcome of these negotiations.

Based on this, we were then able to place all people who say they will vote in the referendum into one of the following groups:



National Identity

Sense of European *identity* plays little role in justifying the European Union for most prospective “Yes” voters.

Only 16% of those who would definitely vote to stay in the EU consider themselves European, even though the question did not make this mutually exclusive to being British, English/Welsh/Scottish or anything else. Among the population as a whole, the figure is only 8%.

Those definitely voting to leave the EU were noticeably more likely to consider themselves English (69%) rather than British (28%), whilst those definitely voting to stay in had more of a balance between a sense of English (55%) and British (44%) identity. Floating voters had a view somewhere in the middle with 39% considering themselves British.

Conversely, for respondents in Scotland, a sense of Britishness was more correlated with being *anti*-EU membership and a Scottish identity was more prevalent among those who were *pro*-EU.

Cost of Membership

The UK public have relatively little conception of the cost of the UK’s membership of the EU.

When asked how much they think the UK pays *per day* to be a member, 42% admitted they did not know and declined to even guess when presented with a range of options.

Of those who did select an answer, most were several orders of magnitude away from the true range of £25–55 million per day depending on whether gross or net contributions are being counted.

Allowing then selected options of £10, £30 or £100 million as being approximately correct, 19% of people gave answers within that range. 26% of respondents gave answers that were at least 10 times too low, whilst 5% gave answers at least 10 times too high – in general respondents were more likely to under-estimate rather than over-estimate the cost.

At the high end, 2% of all respondents (and double that among definite “Out” voters) thought that the UK’s contribution was over £10 billion per day, a figure equivalent to over double the UK’s GDP. It is possible that these people misread the question and thought they were selecting annual contributions, but perhaps it is more likely that this simply reflects the difficulty most members of the public have in conceiving numbers much greater than one million and the difference in scale between millions and billions.

Despite the fact that people were significantly more likely to under- rather than over-estimate the cost of the UK’s membership, the vast majority of those who selected a figure nonetheless thought that the figure they chose did not represent good value for money.

Only 19% of respondents thought their estimate reflected value for money compared to 66% who did not. Even among those definitely planning to vote to stay in the EU, only 42% thought it was value for money. Among the key

group of undecided voters and potential switchers, 74% thought it did not reflect value for money and only 10% thought it did.

A common theme in political campaigns is to portray the amount spent in terms of the number of some alternative public service it could provide. In terms of what respondents thought the money spent on EU membership could be best used for in the case that we were to leave the EU, respondents' verbatim comments were analysed and shown to fall into the following general categories:

NHS / Social Care	41%
Employment / business / infrastructure	12%
Pensions / Welfare / Tackling Poverty	11%
Education / childcare / children's services	8%
Defence / Policing	6%
Housing	4%
Reduce Debt / Deficit	4%
Tax cuts	3%
Border control	2%
Environment / Energy	1%
Overseas aid / charity	1%

Most popular by far was increased funding for the NHS and other health and social care services, followed by general economic or infrastructure investment and higher spending on welfare or poverty reduction measures.

Impressions of Sovereignty

A second perceptions question asked people what percentage of laws affecting the UK they believed originated from the European Union. Impressions here tended to be on the high side; while the House of Commons library analysis of the issue concluded that *"it is possible to justify any measure between 15% and 50% or thereabouts"*, 47% of respondents believed that the figure was above 50% and only 3% thought it was 10% or less compared with 6% who thought the answer was 90% or more.

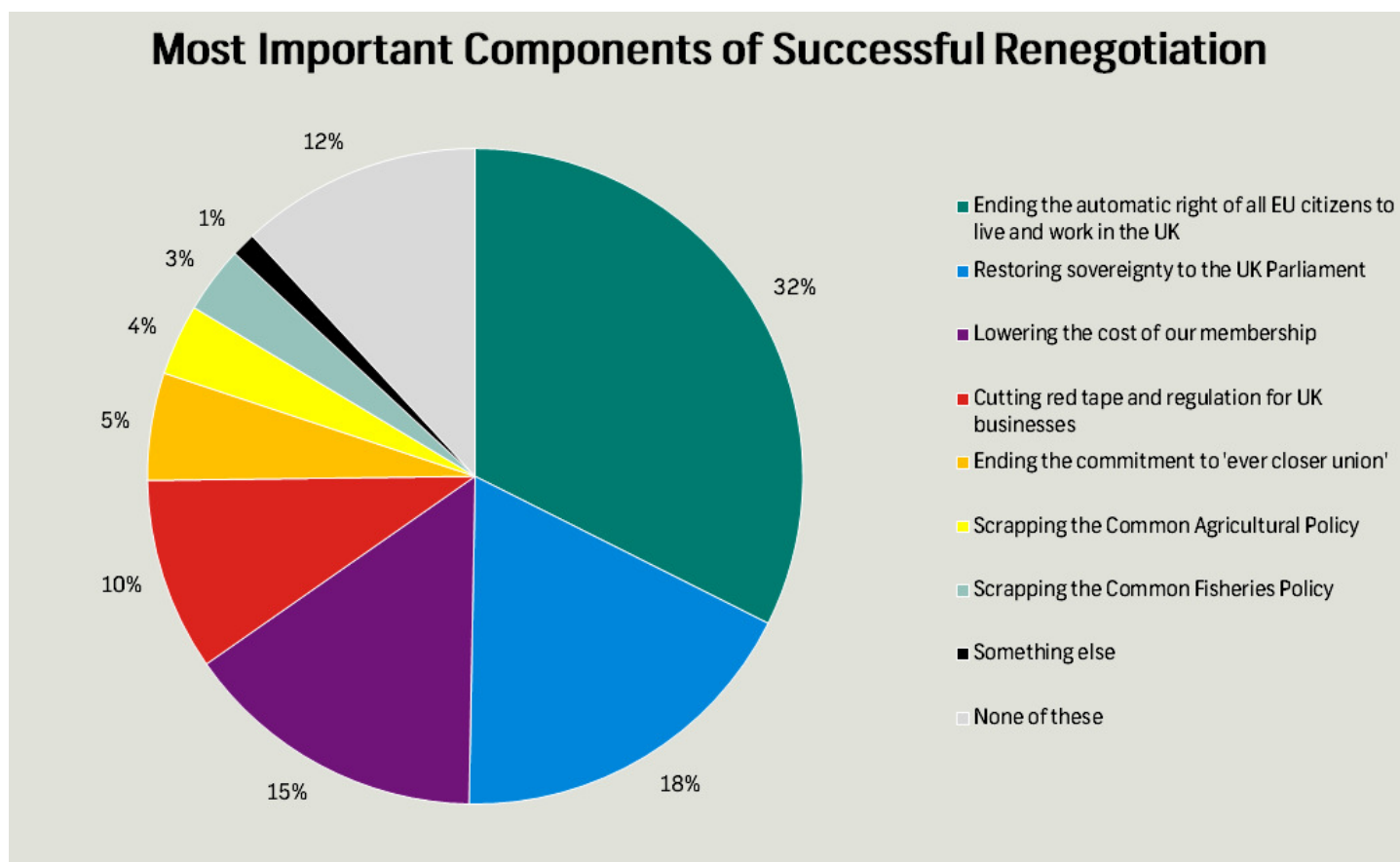
Among the key group of floating voters – those who are undecided who would consider switching – only a quarter thought that a majority of UK laws were originally made in the UK. Three quarters of this group thought that 50% or more of UK laws came from the European Union.

As further evidence of people's concerns about national sovereignty, a strong majority believed that the UK Parliament should overrule the EU in cases of disagreement. 64% believed that the UK Parliament should overrule the EU in these cases compared with only 19% who thought it more important that Parliament remain bound by international agreements.

Even among the group who definitely wanted to remain in the EU more people thought Parliament should overrule the EU in cases of disagreement (45%) than thought it shouldn't (37%). Among floating voters 70% were in favour of overruling the EU and among definite out voters the figure was an overwhelming 82%.

Membership Renegotiation

Given these above concerns about lack of sovereignty and the cost of membership, it is not surprising that both of these issues made the list of the top three things people want to see changed about the EU.



The top issues people sought in renegotiation were, in order:

32% - Ending the automatic right of all EU citizens to live and work in the UK, so that we can control the numbers and quality of immigrants coming to the UK

18% - Restoring sovereignty to the UK Parliament so we can make our own laws

15% - Lowering the cost of our membership, so the money could be spent at home

10% - Cutting red tape and regulation for UK businesses to promote growth

Other issues such as scrapping the Common Agricultural Policy or ending the commitment to “ever closer union” scored just 4% and 5% respectively. Among the key group of floating voters – undecided or those considering switching sides – the results were similar although the top three issues enjoyed an even greater lead over the remainder.

Immigration policy is by far the top issue that people would like to see repatriated. However, given that freedom of movement forms one of the core pillars of the common market, it seems highly unlikely that this is something David Cameron would be able to successfully renegotiate; this would imply those floating voters who selected this as their top goal would come away dissatisfied with the outcome of the renegotiation.

A Eurosceptic Paradox

The campaign is therefore in a peculiar situation. The majority of the UK public hold quite negative views of the European Union. Very few self-identify as European even alongside their other national identities. They see the European Union as controlling an undesirably (and unrealistically) large proportion of UK legislation. They also think the UK spends far too much on its EU membership, even though they *underestimate* the true amount spent. In particular people want to see changes to those areas of the EU – freedom of movement, contributions to budget, national sovereignty – where the UK has so far been and will likely continue to be least successful at achieving meaningful concessions.

Despite all of this, more people nevertheless plan to vote to continue the UK's membership of the European Union.

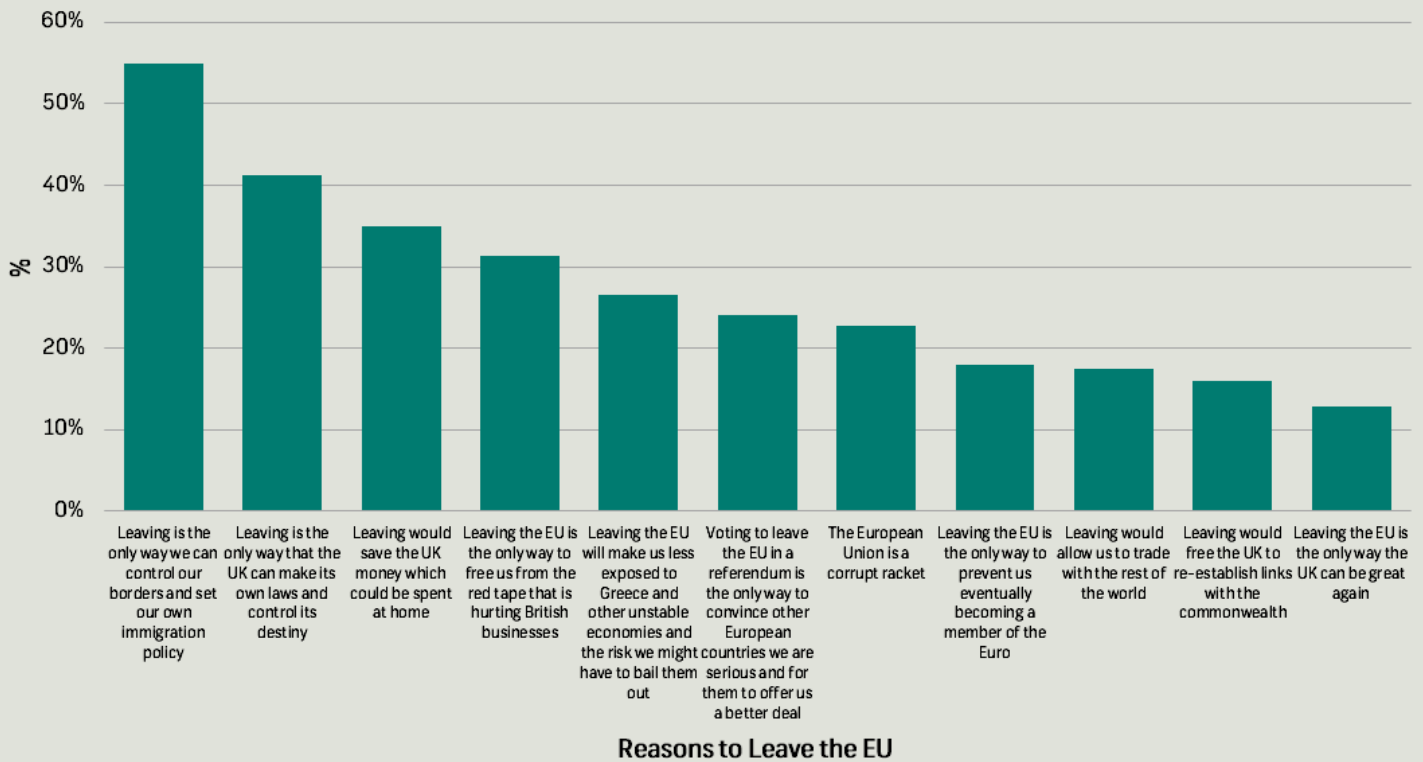
Confronting why this is the case is going to be essential if the “No” campaign is to achieve its aim. On the one hand, the public need little convincing of the downsides of the UK's EU membership and are very receptive to the existing arguments of eurosceptics. On the other hand, it is hard for eurosceptics to see what additional arguments they can deploy to win over those floating voters, for whom all these existing reasons to leave are still not enough to overcome their natural risk-aversion and bias towards the status quo.

Reasons to Leave the EU – Our Questions to the Undecided & Potential Switchers (45% of all voters)

Both the “Yes” and “No” campaigns will be looking to target the most effective possible messages to sway floating voters in the referendum. We looked a range of possible messages on both sides to see which ones resonated the most with such voters – those who were either undecided or considering switching.

Below is a list of possible reasons to leave with the percentage of *floating* voters who ranked each as one of their top three reasons shown.

Percentage of Floating Voters Ranking each Message in Top Three Most Convincing



Leaving is the only way we can control our borders and set our own immigration policy - 55%

Leaving is the only way that the UK can make its own laws and control its destiny - 41%

Leaving would save the UK money which could be spent at home - 35%

Leaving the EU is the only way to free us from the red tape that is hurting British businesses - 31%

Leaving the EU will make us less exposed to Greece and other unstable economies and the risk we might have to bail them out - 27%

Voting to leave the EU in a referendum is the only way to convince other European countries we are serious and for them to offer us a better deal - 24%

The European Union is a corrupt racket - 23%

Leaving would allow us to trade with the rest of the world - 18%

Leaving the EU is the only way to prevent us eventually becoming a member of the Euro - 18%

Leaving would free the UK to re-establish links with the commonwealth - 16%

Leaving the EU is the only way the UK can be great again - 13%

In keeping with the top items the public wanted renegotiated from the EU shown earlier, the same three themes present themselves again here; immigration, sovereignty and the financial cost of membership.

These three messages have not only the most resonance with voters in general but also with the key groups of undecided voters and potential switchers.

Messages for Specific Groups

Then there are a couple of secondary messages which appeal only to specific groups. Freeing British businesses from red tape and regulation was particularly appealing to Conservative and Liberal Democrat voters, though

conversely this message was much less appealing to Labour voters (more of whom presumably see these regulations as beneficial, providing them with employment protections).

Leaving the EU to make the UK less exposed to Greece and other unstable economies was also particularly convincing for some groups – younger voters, those who voted Labour in the general election or else did not vote and those currently inclined to vote “Yes” in the referendum.

Unconvincing Messages

Beyond this, the remaining messages were considered much less convincing. Despite 48% of the public saying they thought “The UK joining the Euro” was a greater threat to the UK economy than “The Scottish National Party being in the UK government”, only 18% of the public put “*Leaving the EU is the only way to prevent us eventually becoming a member of the Euro*” as one of their top three most convincing messages.

The most likely explanation is that while they would consider Euro membership to carry very negative implications, they feel that the status quo of being in the EU but outside the Eurozone is sustainable and therefore there is no need to leave the EU to avoid joining the Euro.

Purely emotive statements such as “*Leaving the EU is the only way the UK can be great again*” were not considered at all convincing. This was the lowest ranked message, followed by “*Leaving would free the UK to re-establish links with the commonwealth*” and “*Leaving would allow us to trade with the rest of the world*”.

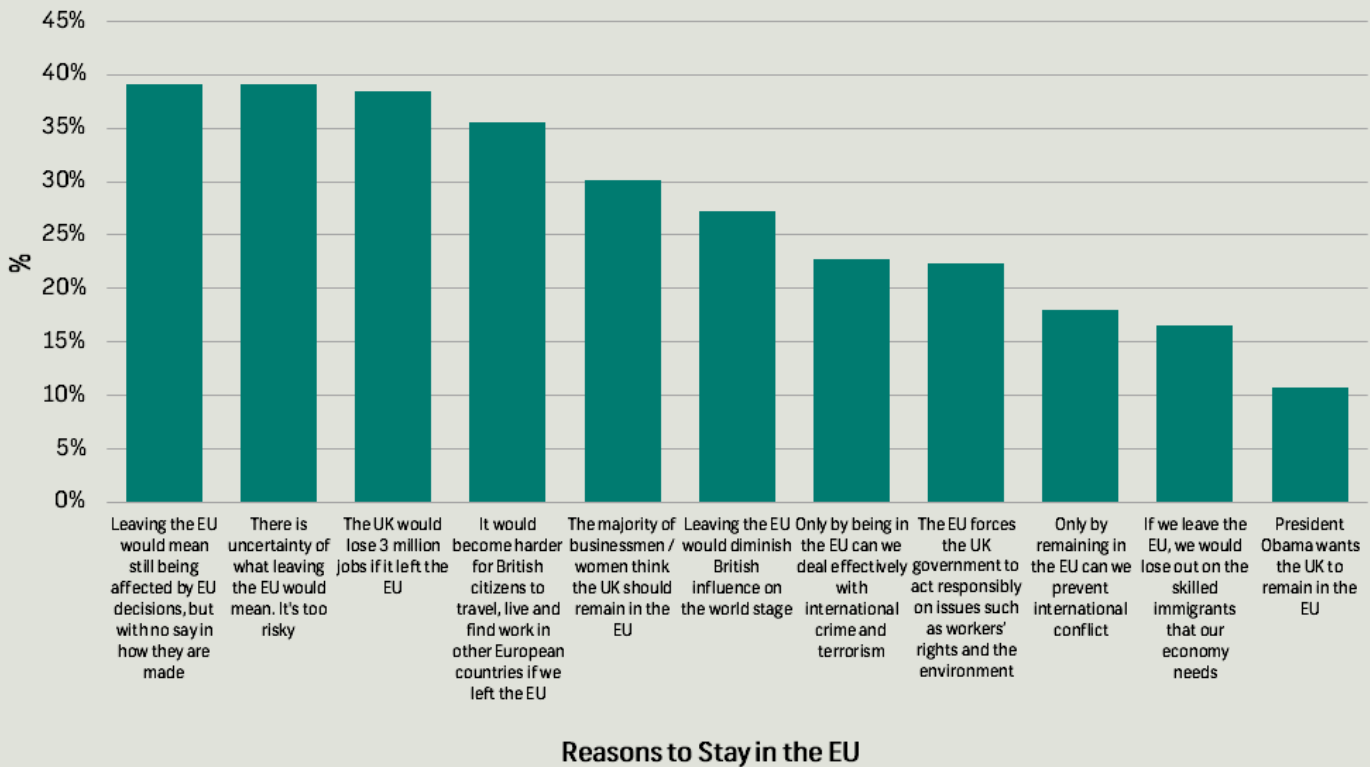
What these three messages have in common is that they are more emotive rather than policy based and fail to make a clear causal connection in people’s minds between leaving the EU and achieving these rather vaguely stated aims.

Reasons to Stay in the EU – Our Questions To The Undecided & Potential Switchers (45% of all voters)

Looking at messages the “Yes” campaign might find effective, one key difference exists with the anti-EU messages above.

Whereas the most popular messages overall for *leaving* the EU were better rated among existing “No” voters than the rest of the population, the most persuasive reasons to *stay in* the EU were ranked higher by the floating voters or those planning to vote “No” than they were by those already planning to vote “Yes”.

Percentage of Floating Voters Ranking each Message in Top Three Most Convincing



These were, in order:

Leaving the EU would mean still being affected by EU decisions, but with no say in how they are made - 39%

There is uncertainty of what leaving the EU would mean. It's too risky - 39%

The UK would lose 3 million jobs if it left the EU - 38%

It would become harder for British citizens to travel, live and find work in other European countries if we left the EU - 36%

The majority of businessmen/women think the UK should remain in the EU - 30%

Leaving the EU would diminish British influence on the world stage - 27%

Only by being in the EU can we deal effectively with international crime and terrorism - 23%

The EU forces the UK government to act responsibly on issues such as workers' rights and the environment - 22%

Only by remaining in the EU can we prevent international conflict - 18%

If we leave the EU, we would lose out on the skilled immigrants that our economy needs - 17%

President Obama wants the UK to remain in the EU - 11%

There are then four powerful messages here which stand as high influencers, with several other messages, such as those around conflict prevention or the views of leaders such as President Obama, looking considerably *less* effective. International influence in general is only ranked as a middling concern, alongside combating international crime and terrorism.

Why Influence & Security Are Not Major Factors

One reason from the research is that the public do not seem to believe the EU does much to help in these areas at the moment. Only 13% of voters (and 10% of floating voters) think it would become more difficult to deport

foreign-born terrorists if the UK left the European Union, compared with 45% who thought it would in fact become easier.

On the question of influence, the public were strongly divided on whether they thought the UK's impact on the world stage was enhanced or diminished by the EU – 26% to 25%. This was a particularly polarising question, with the responses among definite “In” voters being 55% enhanced to 8% diminished, while among definite “Out” voters the view was 7% enhanced to 50% diminished.

Floating voters were slightly more likely to say diminished (23%) than enhanced (19%) but even more likely to say it makes no difference (42%). This is despite the fact that people are slightly more likely to hold the view that the UK is a diminished force on the world stage that needs support from other countries (48%) rather than a major world power that does not need such support (37%). People seem to have a pessimistic view of the UK's influence in general, but don't on average feel that EU membership does much to relieve that.

How Should the Pro-EU Side Deal with Immigration Concerns?

It is no surprise that the second least effective pro-EU message is the corollary of the most effective anti-EU message – that leaving the EU would mean less immigration for the UK. However, there appears to be a more effective counter on this key issue which the “Yes” campaign could use – the quid pro quo argument that it would become *“harder for British citizens to travel, live and find work in other European countries if we left the EU”*.

The next strong argument for ‘remain’ is the threat to jobs that the UK would face if we left the EU. It is likely that the argument that leaving the EU represents an unknown risk is also being considered in largely economic terms by respondents, as there is considerable evidence that it was during the independence referendum in Scotland where this was considered one of the most decisive reasons to vote for the status quo.

Finally, joint top, is the argument that leaving the EU is a futile gesture as its influence will still linger in the UK and that all that will have changed is the loss of the UK's place at the negotiating table. This is the so called “fax democracy” argument as coined by Norwegian Prime Minister Jens Stoltenberg, that any kind of free-trade relationship outside of the EU will still represent a considerable loss of sovereignty.

Who Are The Key Voices?

Overall, there is considerable variation in how much voters think different types of people might influence their views about how to vote in the referendum. However, across the board, those definitely planning to vote to *leave* the EU said they would be less influenced by *any type of messenger* compared with both those definitely voting to stay in and those who were floating.

This suggests that definite “out” voters are largely switched off from the debate, as they have already made up their mind and are too cynical about messages being presented to pay them much attention. Crucially though, floating voters are in some cases more likely to say they would be influenced by some messengers than even definite “in” voters.

The percentage of floating voters (undecided or potential switchers) saying they would be influenced “very much” or “quite a bit” by each of the following is shown below:

69% - Economists & other academics
67% - UK business leaders
61% - UK politicians
43% - Former chiefs of the UK armed forces
34% - Trade union leaders
33% - Foreign leaders
20% - British religious leaders
14% - Leading British musicians
14% - British sports stars

As can be seen, the most influential figures by far are Economists, other academics and business leaders; assumed to be those people who have the most objective view as to the likely economic consequences of withdrawal. Whichever campaign can secure the most vocal support from the most prominent and trusted members of these communities will have an advantage in terms of the influence of their message.

The least influential spokespersons are cultural figures – sports stars, musicians and religious leaders – who are presumably thought to possess no special insight into foreign and economic affairs that is not available to the average member of the public, even if these figures are respected and trusted on other matters.

Younger voters are slightly more likely to say they would be influenced by these types of figures, but even young voters say they would generally listen to other types of figure more.

Foreign leaders rate fairly low in the list with only a third of floating voters feeling they might influence their decision, which corresponds with the views of President Obama being at the bottom of the list of possible reasons to stay in the EU earlier.

Speakers with Reach into Specific Groups

Trade union leaders have particular influence among Labour voters, about 45% of whom would listen to them, but less so among Conservative and UKIP voters. Former armed forces leaders, on the other hand, have moderate influence among all demographic and political groups, with the exception of definite “out” voters who, as mentioned, are unreceptive to all potential spokespeople.

Business Leaders

Business leaders ranked very highly in terms of how much their views would influence voters, despite the fact that a clear majority of the public, 62%, thought that business leaders would be more motivated by their own financial interests than the UK economic interest when talking about the EU.

It would appear that despite this attributed self-interested motive, the public feel that the self-interests of business leaders are not that far from their own economic interests, when taken in aggregate. After all, if the majority of businesspeople think something is good or bad for their own business, it can reasonably be assumed to be good or bad for employment and wage prospects for employees in their entire sector.

As for which business leaders would make good spokespeople, we asked respondents to name a business leader who they most trusted. Results were dominated by two names, Richard Branson and Alan Sugar, who were the only figures to be mentioned by more than 2% of respondents and between them accounted for 42% of all responses. Out of the 5,000 responses to the survey, only 16 individuals were named by double digits of respondents. These 16 are listed in order below.

	Number	Percentage
Richard Branson (Virgin)	1495	29.9%
Alan Sugar	597	11.9%
James Dyson (Dyson)	89	1.8%
David Cameron	80	1.6%
Digby Jones (CBI)	44	0.9%
Mark Carney (BoE)	29	0.6%
Peter Jones	25	0.5%
Andy Street (John Lewis)	23	0.5%
Karen Brady	21	0.4%
Dave Lewis (Tesco)	20	0.4%
Philip Green	17	0.3%
Duncan Bannatyne	16	0.3%
Stuart Rose (M&S)	14	0.3%
Lord Bamford (JCB)	13	0.3%
Nigel Farage	13	0.3%
Boris Johnson	10	0.2%

Apart from Richard Branson and Alan Sugar, other common responses were also business people who had some degree of media presence – Karen Brady also known from the Apprentice and Duncan Bannatyne and Peter Jones from Dragons Den. Three politicians also made the list: David Cameron, Nigel Farage and Boris Johnson despite not being business people in the conventional sense. Bank of England Governor Mark Carney came in at number six.

More than anything, this list indicates the general lack of business people who are known and trusted by the public, with the exception of the two dominant personalities at the top.

It is worth noting that many respondents wrote in verbatim comments along the lines of *“none”*, *“there isn’t one”*, *“don’t know”*, sometimes indicating their general distrust / disrespect towards business leaders but more often simply acknowledging that they struggled to name any specific individuals.

We already know that people feel they would be significantly influenced by the views of business leaders in general, but apart from Branson & Sugar there are few stand out individuals who are obviously going to wield more influence than most.

Which Media?

Finally, it is worth looking at which media outlets will play the biggest role in the campaign. The BBC remains by a significant margin the most influential media source for respondents of all voting groups.

For all types of voters, however, other broadcast news such as ITN and Sky are still considered more influential than even the most influential newspapers (the only exception being definite “in” voters who are more inclined to be influenced by the Guardian newspaper than by any broadcast news other than the BBC).

This demonstrates the importance of securing good broadcast coverage to both campaigns and in particular making good use of whatever official political broadcast slots they are allocated.

In terms of print media, below is shown the list of newspapers in order of their influence on floating voters – those who are undecided or considering switching their vote based on the renegotiation.

- 35% - The Financial Times
- 33% - The Times / Sunday Times
- 29% - The Telegraph / Sunday Telegraph
- 28% - The Guardian / Observer
- 27% - The Daily Mail / Mail on Sunday
- 26% - The Independent / Independent on Sunday
- 18% - The Daily Express / Sunday Express
- 17% - Metro
- 17% - The Daily Mirror / Sunday Mirror
- 17% - The Sun / Sun on Sunday
- 16% - London Evening Standard
- 13% - The Daily Star / Daily Star Sunday

Unsurprisingly, broadsheet newspapers are considered to have considerably more influence than tabloid newspapers, the Daily Mail being the most influential of the non-broadsheet newspapers. Free daily newspapers such as Metro and the Evening Standard score poorly overall but it is worth noting that among residents in Greater London they scored 36% and 42% respectively, making them extremely influential in that limited part of the country (though in London they were still not considered the most influential newspapers – the Financial Times scored even higher at 53%).

It is important to bear in mind that these are self-reported figures and of course do not reflect the actual relative readership levels of these newspapers. In reality the Financial Times only has a circulation of 220,000, compared with close to 2 million for the Sun and 1.7 million for the Daily Mail, meaning articles in the latter papers will reach far more people, even if those who do read them might consider themselves less likely to be influenced by what they read.

Nevertheless, those publications near the top of the list could be considered to carry more weight in terms of their campaign endorsements, particularly as they are then often reported on broadcast media. Newspapers such as the

Express or Daily Star, however, which have circulation figures similar to broadsheets but much less trust / perceived influence, are likely not going to prove effective carriers of political messages during the campaign. It is worth noting that the Daily Express, usually considered to be strongly Eurosceptic, still scores lower on its trust/influence among definite “out” voters (17%) than among definite “in” voters (20%) or floating voters (18%).

Conclusion

The “Yes” side begins the referendum campaign with a moderate but not overwhelming advantage, mainly based on the fear of uncertainty and status quo bias that helped “No” to triumph in both the Scottish Independence and AV referendums during the last Parliament.

However, given the demands and expectations of undecided voters about the renegotiation are focused on things Cameron is unlikely to achieve - ending free movement of people, reduced budget contributions, greater sovereignty - there are reasons to think this lead may shrink as time goes on. Given the lack of enthusiasm of even many “Yes” voters for the EU and the older average age of “No” voters, there is also every chance that the “No” campaign finds it easier to mobilise their supporters to actually turn out on the day - whenever that day might turn out to be.

- *Patrick Briône*
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Full data tables for this poll can be found here: <http://survation.com/wp-content/uploads/2015/07/Europoll-Tables-for-Release.pdf>

Addendum: “Confused” Voters & Potential Question Misunderstanding

There are some indications that a few respondents may have misunderstood or not properly read one or both of these questions. Out of the 2,109 respondents who said they would vote “Yes” in the referendum, 100 of them or 4.8% responded to the subsequent question with “I will definitely vote to leave the EU, regardless of the renegotiation”. Similarly, 54 respondents or 3.1% of those who said they would vote “No” in the referendum selected “I will definitely vote to stay in the EU, regardless of the renegotiation” in the subsequent question. In total this group of “confused” voters currently represents around 3% of all referendum voters in our sample, who on balance seem slightly more likely to be genuine “In” than “Out” voters looking at their other responses. One conclusion is that, at this early stage in the campaign, those respondents who don’t pay sufficient attention to the wording of the referendum question might select “Yes” assuming the question was about *leaving* rather than *staying in* the EU, or vice versa.

Whilst there will always be a certain small group of people who remain confused up to the point of actually voting in the real referendum in a way opposite to how they intended, in practice we would expect the number of people affected by this will diminish once the campaign gets underway and the media makes it very obvious to most people which side is aligned with the word “No” and which side with the word “Yes”.