

CSI Brexit 5: The British Public's Brexit Priorities[†]

5th July, 2018

Summary

- Recent polls and surveys have considered a number of different Brexit priorities: securing a free trade deal with the EU, stopping contributions to the EU budget, regaining control of EU immigration, and ending the role of the EU in UK law-making.
- When respondents are asked to pick from among a number of different negotiating priorities, achieving free trade with both the EU and countries outside the EU appears to be a top priority.
- Yet when presented with a choice between 'soft' Brexit on the one hand and 'hard' Brexit on the other, opinion remains decidedly split.
- There has been little overall change in the public's relative preference for 'soft' Brexit since the EU referendum took place.
- Results can vary quite substantially depending on question wording.

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Introduction

This report begins by summarising what is known about the British public's Brexit priorities. It proceeds to examine how support for 'soft' versus 'hard' Brexit has changed since the EU referendum by conducting a simple meta-analysis of polls. It then further explores the British public's Brexit priorities by analysing data from Waves 2 and 3 of the Centre for Social Investigation's longitudinal survey on attitudes to Brexit.¹

The British public's current Brexit priorities

A variety of possible deals could be struck between the UK and the EU over the next 18 months, ranging from the 'softest' possible Brexit to the 'hardest' possible Brexit.² The 'softest' possible Brexit would be one where the UK remained inside both the Single Market and the Customs Union, whereas the 'hardest' possible Brexit would be one where the UK left both of these institutions and reverted to WTO rules for trade.³ In the latter case, the UK would no longer be subject to the rulings from the European Court of Justice, would regain the power to control EU immigration and negotiate free trade deals independently, and would no longer have to contribute to the EU budget. However, British businesses exporting to the EU would probably face additional costs or regulatory barriers, tensions around the Irish border might flare up again, and the UK would have to renegotiate the free trade deals that the EU has already signed. The British Prime Minister Theresa May initially stated that her government intends to leave both the Single Market and the Customs Union, although it remains to be seen whether or not she will follow through with this commitment.⁴

In a previous report, I reviewed the evidence from polls and surveys up to August 2017 about what sort of Brexit deal the British public want.² My main conclusions were fivefold. First, about 25-30% of the public say they want to stop Brexit completely, and about the same fraction are in favour of a second referendum on EU membership. Second, a substantial majority of the public are in favour of granting EU citizens already living in Britain the right to stay. Third, a majority of the public do not regard continued free movement or continued contributions to the EU budget as being compatible with the referendum result. Fourth, substantial majorities of the public say they want the power to control immigration as well as continued free trade with the EU. And fifth, the public appear to be about evenly split on the choice between 'soft' and 'hard' Brexit.

What have more recent polls and surveys found? Lord Ashcroft surveyed ~1,600 people in November 2017, and asked them to rate 14 different negotiating priorities (on a 0-100 scale) in terms of how important each one should be to the final terms on which the UK leaves the EU.⁵ The three most important were: 'The UK being able to negotiate its own free trade deals with other countries' (average score = 78), 'Making sure the UK and EU have similar rules on banking and financial services, so UK firms can do business as easily as possible in EU countries' (average score = 75), and 'No tariffs on trade between the UK and EU countries' (average score = 73). YouGov surveyed 1,981 people in February of 2018, and asked them to tick the three most important negotiating priorities from a list of eight.⁶ The three most frequently mentioned were: 'Allowing Britain to make its own trade deals with countries outside the EU' (ticked by 38%), 'Allowing British companies to trade with the EU without tariffs or restrictions' (ticked by 38%), and 'Maintaining co-operation between Britain and the EU on security and anti-terrorism' (ticked by 36%). Finally, ComRes surveyed 1,096 people in February/March of 2018, and asked them to tick the most important negotiating priorities from a list of five.⁷ The negotiating priority with the highest average support was 'A free trade deal with Europe' (ticked by 30%).

The preceding results seem to indicate that the public's top priority for Brexit is achieving free trade with both the EU and countries outside the EU. Consequently, the deal with the greatest public support at the present time may be one where the UK remains inside the Single Market but leaves the Customs Union (i.e., approximately, the Norway option). And indeed, such a deal is not so dissimilar to the transitional arrangement that was negotiated between the British government and the EU in March 2018.⁸ However, as mentioned above, the Prime Minister was relatively clear in the Lancaster House speech that her government intends to regain control of immigration from the EU, which—to quote directly from the speech—“cannot mean membership of the single market”.⁴ In addition, according to other opinion polls, a sizable majority of the public believes that continued freedom of movement would not respect the result of the referendum.⁹

How has support for ‘soft’ versus ‘hard’ Brexit changed since the EU referendum?

In a previous report, I assembled all the polls and surveys I could find pertaining to the choice between ‘soft’ versus ‘hard’ Brexit up to 14 August 2017 (see Appendix A of that report for further details on methodology).² After calculating the difference in support for ‘soft’ versus ‘hard’ Brexit simply as the percentage supporting ‘soft’ Brexit minus the percentage supporting ‘hard’ Brexit, I examined how the balance of opinion had changed since the EU referendum on 23 June 2016. My main finding was that the public’s relative preference for ‘soft’ Brexit followed a roughly U-shaped path up to August of 2017: it went down during the winter of 2016-17, and subsequently went back up.

I updated this meta-analysis of polls and surveys by including all those published between 14 August 2017 and 14 May 2018. 19 additional polls met the inclusion criteria, for a total of 58 since the EU referendum. My main finding was as follows. (See Appendix A of this report for further details.) Since the EU referendum on 23 June 2016, the public’s relative preference for ‘soft’ Brexit appears to have gone down, then up, and then back down again. As a consequence, there has been little overall change in the balance of opinion. This finding accords with other evidence that public attitudes toward Brexit have remained relatively constant over the last 18 months.^{10,11} However, some series do show a slight shift in the pro-Remain direction.^{12,13}

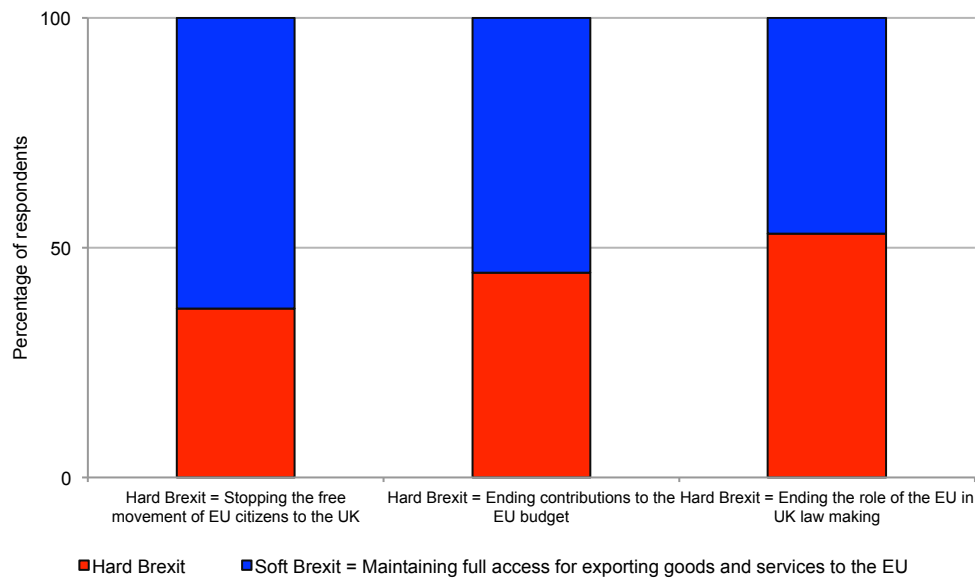
Making trade-offs: Which element of ‘hard’ Brexit matters most?

We asked questions about the public’s Brexit priorities in Wave 2 and Wave 3 of our survey. For the former, 3,607 people were surveyed online in November of 2017; while for the latter, 3,003 people were surveyed online in February of 2018. These surveys were carried out by the polling company Kantar.

In both Wave 2 and Wave 3, we used a split-sample design to examine the public’s Brexit priorities. In Wave 2, respondents were randomly assigned to one of three questions.¹⁴ Each question was of the form, ‘Suppose you had to make a choice between the following options. Which would you choose?’ The two options corresponded to ‘hard’ Brexit and ‘soft’ Brexit, respectively. The option corresponding to ‘soft’ Brexit was the same in all three cases, namely ‘Maintaining full access for exporting British goods and services to the EU’. The option corresponding to ‘hard’ Brexit varied depending on which question the respondent had been assigned. For the first third of respondents, the ‘hard’ Brexit option was ‘Stopping the free movement of EU citizens to the UK’. For the next third of respondents, the ‘hard’ Brexit option was ‘Ending contributions to the EU budget’. And for the final third of respondents, the ‘hard’ Brexit option was ‘Ending the role of the EU in UK law making’.

The breakdown of support for ‘soft’ versus ‘hard’ Brexit for each of the three questions is displayed in Figure 3. Interestingly, our respondents are least supportive of ‘hard’ Brexit when it is defined as ‘Stopping the free movement of EU citizens to the UK’ (37% support), and are most supportive of ‘hard’ Brexit when it is defined as ‘Ending the role of the EU in UK law making’ (53% support). Their support for ‘hard’ Brexit is intermediate when it is defined as ‘Ending contributions to the EU budget’ (45% support). Given that ‘immigration’ was one of the two most frequently cited reasons for voting Leave (the other being ‘sovereignty’)¹⁵, we were somewhat surprised that our respondents were more willing to forgo guaranteed access to EU markets in order to end budget contributions than in order to end free movement. We suspected that question wording might help to explain this unexpected result.¹⁶ In particular, we suspected that some respondents might have interpreted ‘Stopping the free movement of EU citizens to the UK’ to mean ‘Stopping all visa-free movement of EU citizens into the UK’. Hence we decided to follow-up with additional questions pertaining to free movement/control over immigration.

Figure 3. Breakdown of support for ‘soft’ versus ‘hard’ Brexit for three different definitions of ‘hard’ Brexit.

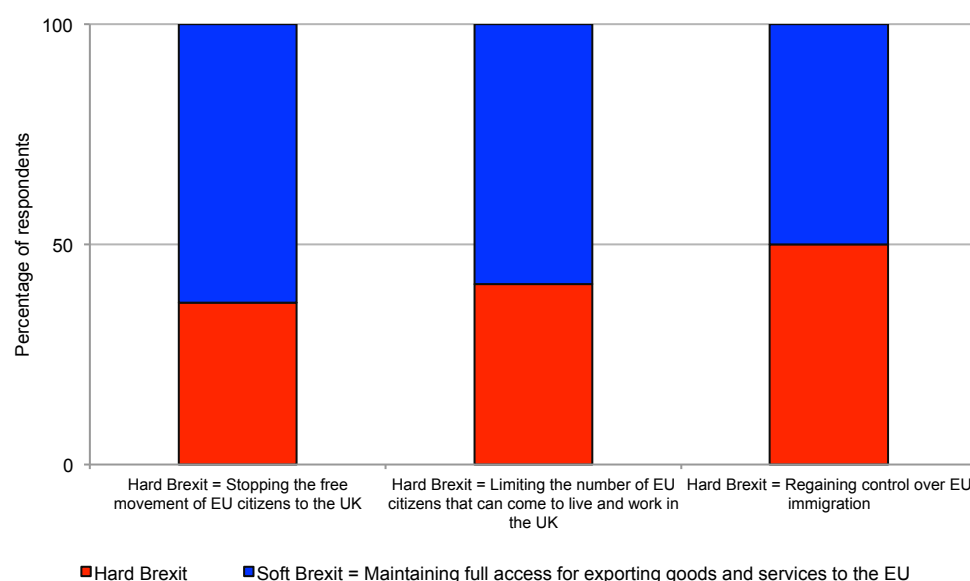


Notes: Each bar shows the percentage of respondents supporting ‘soft’ versus ‘hard’ Brexit for a given definition of ‘hard’ Brexit. The unweighted n for each bar is ~1,018. Sample weights were applied. Moving from left to right, the first two differences were statistically significant at $p < 0.01$, whereas the last difference was not statistically significant. ~5% of respondents answered ‘don’t know’ on each item. These respondents were excluded, along with the fastest 2% by total survey time.

In Wave 3, respondents were again randomly assigned to one of three questions. As before, each question was of the form, ‘Suppose you had to make a choice between the following options. Which would you choose?’, and the option corresponding to ‘soft’ Brexit was the same in all three cases, namely ‘Maintaining full access for exporting British goods and services to the EU’. The option corresponding to ‘hard’ Brexit again varied depending on which question the respondent had been assigned. For the first third of respondents, the ‘hard’ Brexit option was ‘Stopping the free movement of EU citizens to the UK’. For the next third of respondents, the ‘hard’ Brexit option was ‘Limiting the number of EU citizens that can come and live and work in the UK’. And for the final third of respondents, the ‘hard’ Brexit option was ‘Regaining control over EU immigration’.

The breakdown of support for ‘soft’ versus ‘hard’ Brexit for each of the three questions is displayed in Figure 3. Reassuringly, when ‘hard’ Brexit is defined as ‘Stopping the free movement of EU citizens to the UK’, support is almost identical to the level observed in Wave 2 (37% support). More interestingly, our respondents are substantially more supportive of ‘hard’ Brexit when it is defined as ‘Regaining control over EU immigration’ (50% support). Their support for ‘hard’ Brexit is intermediate when it is defined as ‘Limiting the number of EU citizens that can come and live and work in the UK’ (41% support). These results indicate that the public’s relative preference for ending free movement over guaranteed access to EU markets may vary by up to 13 percentage points purely based on how ‘ending free movement’ is described.

Figure 4. Breakdown of support for ‘soft’ versus ‘hard’ Brexit for three different ways of asking about immigration control.



Notes: Each bar shows the percentage of respondents supporting ‘soft’ versus ‘hard’ Brexit for a given definition of ‘hard’ Brexit. The unweighted n for each bar is ~866. Sample weights were applied. Moving from left to right, the first two differences were statistically significant at $p < 0.001$, whereas the last difference was not statistically significant. ~4% of respondents answered ‘don’t know’ on each item. These respondents were excluded, along with the quickest 2% by total survey time.

Conclusion

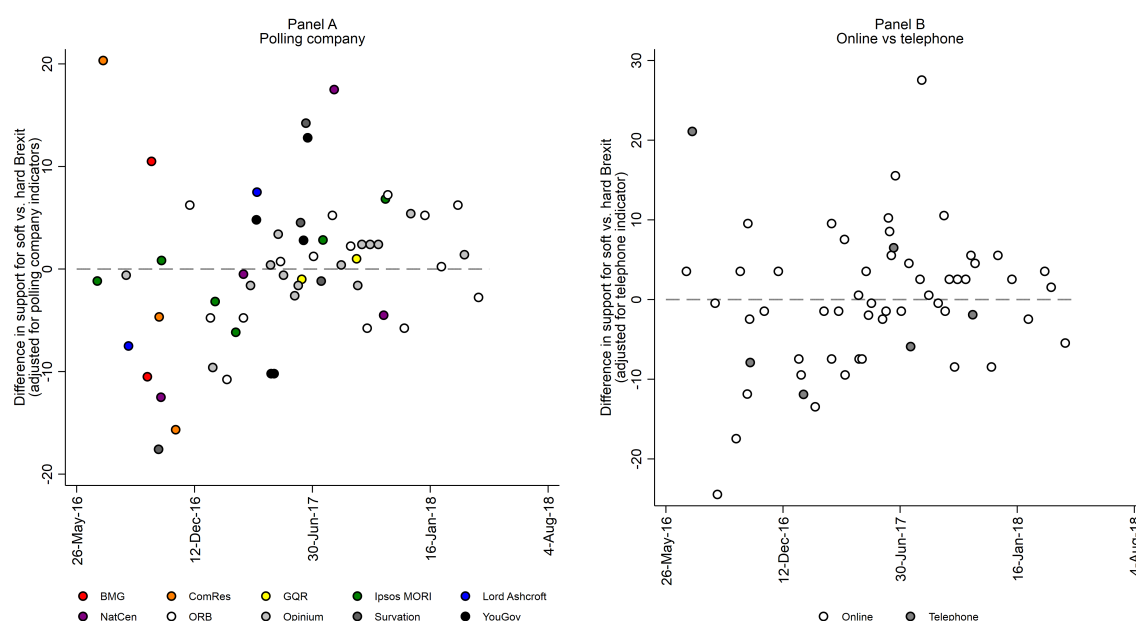
This report began by summarising what is known about the British public’s Brexit priorities. It proceeded to examine how support for ‘soft’ versus ‘hard’ Brexit has changed since the EU referendum by conducting a simple meta-analysis of polls. It then further explored the British public’s Brexit priorities by analysing data from Waves 2 and 3 of the Centre for Social Investigation’s longitudinal survey on attitudes to Brexit.

When respondents are asked to pick from among a number of different negotiating priorities, achieving free trade with both the EU and countries outside the EU appears to be a top priority. Yet when presented with a choice between ‘soft’ Brexit on the one hand and ‘hard’ Brexit on the other, opinion remains decidedly split. Indeed, there has been little overall change in the public’s relative preference for ‘soft’ Brexit since the EU referendum took place. Finally, it is important to be aware that results can vary quite substantially depending on question wording. Having said that, one might tentatively conclude that, among the various elements of ‘hard’ Brexit, it is national sovereignty that matters most to the public at the present time.

Appendix A

Figure A1 displays two scatterplots of difference in support for ‘soft’ versus ‘hard’ Brexit since the EU referendum: in the left-hand panel, the variable has been adjusted for polling company indicators (‘house effects’); and in the right-hand panel, it has been adjusted for on an indicator for online versus telephone (‘mode effects’). Adjusting for polling company indicators subtracts each value from the mean value for polls conducted by the same company, thereby controlling for differences in question wording and methodology across different polling companies. (The same applies to adjusting for the indicator for online versus telephone.) In both panels, the dashed zero-line runs roughly through the centre of the points, indicating that the public continues to be about evenly split on the choice between ‘soft’ versus ‘hard’ Brexit.

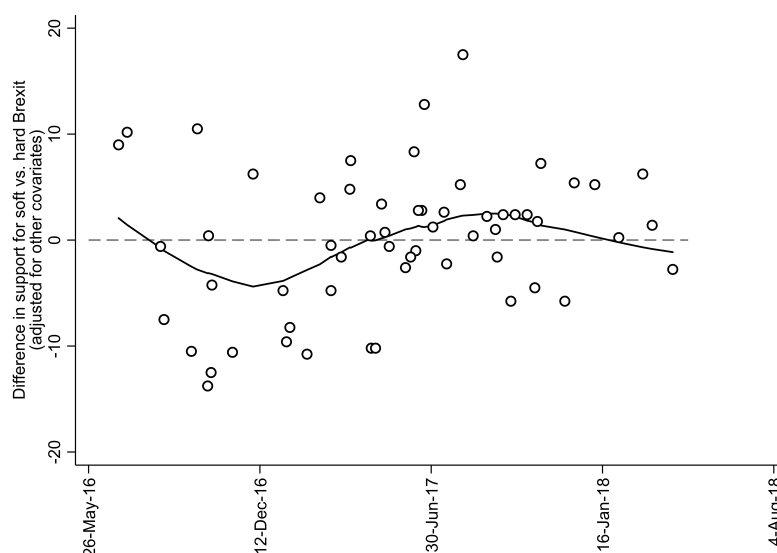
Figure A1. Scatterplots showing difference in support for ‘soft’ versus ‘hard’ Brexit since the EU referendum.



Notes: Panel A demarcates polls conducted by different companies. Panel B demarcates polls conducted online from those conducted by telephone

Figure A2 displays another scatterplot of the difference in support for ‘soft’ versus ‘hard’ Brexit, this time with the difference adjusted for both polling company indicators and an indicator for online versus telephone. A non-linear best-fit line has been superimposed on the chart, which implies that support for ‘soft’ Brexit is currently about 1 percentage points lower than support for ‘hard’ Brexit, but was about 2 percentage points higher in the spring of 2017.

Figure A2. Scatterplot showing difference in support for ‘soft’ versus ‘hard’ Brexit since the EU referendum.



Notes: y-values have been adjusted for polling company indicators and an indicator for online versus telephone. A loess line with default parameter settings has been fitted to the data. This is similar to a moving-average.

Table A1 displays estimates from OLS models of difference in support for ‘soft’ versus ‘hard’ Brexit, treating time as linear. Days since first poll is a significant predictor at $p < 0.05$ in both the second model and the fourth model, but the sizes of the effects are rather small.

Table A1. OLS models of difference in support for ‘soft’ versus ‘hard’ Brexit, treating time as linear.

	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit
Days since first poll	0.01 (0.01)	0.02* (0.01)	0.01 (0.01)	0.01* (0.01)
ComRes		21.27** (7.08)		16.57* (6.60)
GQR		11.07 (8.12)		12.05 (7.40)
Ipsos MORI		9.04 (6.44)		0.15 (6.46)
Lord Ashcroft		-11.31 (7.78)		-11.07 (7.08)
NatCen		13.04+ (6.94)		13.75* (6.32)
ORB		-1.51 (6.37)		-0.47 (5.81)
Opinium		2.15 (6.23)		3.04 (5.68)
Survation		8.99 (6.91)		6.14 (6.35)
YouGov		5.68 (6.73)		6.41 (6.13)
Telephone			14.17*** (3.79)	14.05** (4.30)
Constant	-0.28 (2.82)	-8.07 (5.53)	-2.90 (2.64)	-7.79 (5.03)
n	58	58	58	58
R^2	0.01	0.47	0.21	0.57

Notes: Standard errors are given in parentheses. The date of the first poll is: 30/06/2016. The reference category for polling company indicators is: BMG. The reference category for telephone is: online. Significance levels: + 10%, * 5%, ** 1%.

Table A2 displays estimates from OLS models of difference in support for ‘soft’ versus ‘hard’ Brexit, treating time as cubic. Days since first poll, days since first poll squared and days since first poll cubed are significant predictors of difference in support in all four models. Once again, however, the sizes of the effects are rather small.

Table A2. OLS models of difference in support for “soft” versus “hard” Brexit, treating time as quadratic.

	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit	Difference in support for “soft” versus “hard” Brexit
Days since first poll	-0.16* (0.07)	-0.11+ (0.06)	-0.13* (0.06)	-0.11* (0.05)
Days since first poll squared/100	0.07** (0.02)	0.05* (0.02)	0.05* (0.02)	0.05* (0.02)
Days since first poll cubed/10,000	-0.01** (0.00)	-0.01* (0.00)	-0.01* (0.00)	-0.00* (0.00)
ComRes		19.91** (6.78)		15.53* (6.31)
GQR		8.69 (8.03)		10.17 (7.31)
Ipsos MORI		7.59 (6.22)		-0.54 (6.19)
Lord Ashcroft		-12.08 (7.46)		-11.67+ (6.78)
NatCen		12.09+ (6.77)		13.10* (6.17)
ORB		-1.40 (6.17)		-0.22 (5.62)
Opinium		1.07 (6.13)		2.28 (5.58)
Survation		7.83 (6.81)		5.54 (6.23)
YouGov		5.20 (6.77)		6.32 (6.17)
Telephone			12.98*** (3.67)	13.29** (4.12)
Constant	8.78 (5.29)	-0.33 (6.44)	4.36 (4.97)	-0.35 (5.86)
<i>n</i>	58	58	58	58
<i>R</i> ²	0.14	0.53	0.30	0.62

Notes: Standard errors are given in parentheses. The date of the first poll is: 30/06/2016. The reference category for polling company indicators is: BMG. The reference category for telephone is: online. Significance levels: + 10%, * 5%, ** 1%.

Notes and References

- ¹ Richards, L. & Heath, A. & Carl, N. (2017). Red Lines and Compromises: Mapping Underlying Complexities of Brexit Preferences. *Political Quarterly*, early online view.
- ² Carl, N. (2017). What sort of Brexit deal does the British public want? A review of the evidence so far. *Centre for Social Investigation*, published online.
- ³ WTO (World Trade Organisation) rules apply to trade between countries that do not have a free trade agreement with one another. The two most important such rules are: ‘most favoured nation’, and ‘national treatment’. The ‘most favoured nation’ rule means that a country must treat all of its trading partners equally: i.e., if it lowers a tariff on one trading partner, it must lower that tariff on all trading partners. The ‘national treatment’ rule means that a country must give locally produced goods and imported goods the same treatment: i.e., if it lowers the rate of sales tax on a particular type of locally produced good, it must lower the rate of sales tax on that type of imported good.
See WTO. (2018). Principles of the trading system. *World Trade Organisation*, published online.
- ⁴ May, T. (2017). The government’s negotiating objectives for exiting the EU: PM speech. *Gov.uk*, published online.
And see May, T. (2018). Trust me, I’ll take back control — but I’ll need your help. *The Times*, May 13, published online.
- ⁵ Lord Ashcroft. (2017). Brexit poll: Voters think EU aims to punish Britain. *Lord Ashcroft Polls*, published online.
- ⁶ YouGov. (2018). YouGov Cambridge Survey Results [Sample Size: 1981 GB Adults; Fieldwork: 6th - 7th February 2018]. *YouGov*, published online.
- ⁷ ComRes. (2018). Sunday Mirror Brexit poll February 2018. *ComRes*, March 3, published online.
- ⁸ Cooper, C. & Baume, M. (2018). EU and UK reach Brexit transition deal. *Politico*, March 19, published online.
- ⁹ Carl, N. (2017). CSI 2: Ending Free Movement as a Priority in the Brexit Negotiations. *Centre for Social Investigation*, published online.
- ¹⁰ What UK Thinks: EU. (2018). In hindsight, do you think Britain was right or wrong to vote to leave the EU? [Results from: 62 polls]. *What UK Thinks: EU*, published online.
- ¹¹ What UK Thinks: EU. (2018). If there was another referendum on Britain’s membership of the EU, how would you vote? [Results from: 23 polls]. *What UK Thinks: EU*, published online.
- ¹² Curtice, J. (2018). Are voters changing their minds about Brexit? *The UK in a Changing Europe*, 8 February, published online.
- ¹³ Hobolt, S., Leeper, T. & Tilley, J. (2018). Emerging Brexit identities. In Menon, A. (ed.). *Brexit and Public Opinion*. published online.
- ¹⁴ All three questions were preceded by the statement, ‘Now we want to ask about the trade-offs you would be prepared to make to get a deal through.’

¹⁵ Carl, N. (2017). People's stated reasons for voting Leave or Remain. *Centre for Social Investigation*, published online.

¹⁶ Note that, according to evidence assembled by Rob Ford (2018, 'How have attitudes to immigration changed since Brexit?' *Medium*), attitudes to immigration appear to have softened since the referendum in June of 2016. Specifically, the fraction of the population naming 'immigration' as the most important issue has decreased, and the fraction with a positive view of immigration has increased.