



TONY BLAIR  
INSTITUTE  
FOR GLOBAL  
CHANGE

# Moving On: How the British Public Views Brexit and What It Wants From the Future Relationship With the European Union

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Our Future of Britain project seeks to reinvigorate progressive politics to meet the challenges the country faces in the decades ahead. Our experts and thought leaders are setting out a bold, optimistic policy agenda across six pillars: Prosperity, Transformative Technology, Net Zero, Community, Public Services and Britain in the World.

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## Foreword

The polling presented in this paper shows that the British people want a sensible way forward on Brexit which recognises that – in the foreseeable future at least – the decision to leave Europe cannot be reversed, but that Britain needs a constructive relationship with the continent of which we are a part.

What therefore makes sense is for the British government to fix the problems arising from Brexit, notably on the Northern Ireland Protocol, and then build, over time, the right trading, security and political cooperation for the future. We will set out the substance of such a new relationship in a paper to be published in the coming weeks.

Resolution of the outstanding issues from Brexit is important both because they need resolving in their own right, and because such resolution then allows us to move to a larger debate around what Britain needs, of which policy towards Europe is only a part, though an important part both for the standing of Britain and for British business.

Those like myself who were passionately opposed to Brexit will continue to believe it was a mistake but should acknowledge that it will not be undone under this generation of political leadership. Those who supported Brexit should give up trying to ‘prove’ to the rest of us that it was the right decision if only we believed in it enough.

It is what it is. There are ways to fix the relationship. It is crucial it is fixed. It can be done without overturning the Brexit decision. So: do it and move on. That is essentially the message of the polling we conducted with JL Partners.

In the end, irrespective of Brexit, Britain faces the same challenges as all modern developed countries. We’re living through a 21st-century technology revolution as significant as the first Industrial Revolution. We need to transition to a green economy. We require fundamental reform of the institutions of government and public services, including the NHS and our education system. There is a demographic disequilibrium between a smaller younger generation and a growing older generation. And short-term politics – often of ill-thought-through populism – is overwhelming long-term policy.

The clearest manifestation is the present government's agenda, which rightly talks about growth and productivity, but wrongly assumes that the solutions are those from the 1980s; or junking European-wide protections at the workplace (a policy both misguided and, as our polling shows, unpopular), when it is obvious it is these more fundamental challenges which need addressing; and addressing in policy, according to a well-thought-out plan, pursued consistently over a period of at least ten to 20 years. Putting in place such a plan will likely now be the task of a future Labour government. Meanwhile, the immediate task is to re-establish macroeconomic credibility in order for this long-term agenda to have a chance of succeeding.

**Tony Blair**

**Executive Chairman**

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## Executive Summary

This paper explores public attitudes towards the consequences of Brexit and Britain's post-Brexit relationship with the European Union (EU) and presents the findings of an opinion poll conducted for the Tony Blair Institute for Global Change by JL Partners.

### Key Findings

The public's views on Brexit and its consequences:

- Most Britons think Brexit is not “done”, including over a third of Leavers and almost a third of 2019 Conservative voters.
- An overwhelming majority of the public (59 per cent) think that Brexit has worsened the UK's economy, including over a third of Leavers (34 per cent). Voters from all major political parties believe that Brexit has made the economy worse rather than better.
- Most voters view the effects of Brexit on their lives as mostly negative, particularly on trade (net -52 per cent) and ease of doing business with the EU (-45 per cent).
- The consequences of Brexit are seen most negatively in Northern Ireland, Scotland and the North East of England.
- Over a third of voters do not expect any benefits from Brexit. Those who do mostly expect to benefit from the government making use of its independent trade policy. Few voters expect immediate benefits, and most Leavers think benefits will materialise in the next three to five years.
- Most of the public think that the post-Brexit relationship with the EU is functioning badly in all core areas, but especially on trade (net -42 per cent) and cooperation to maintain peace in Northern Ireland (-29 per cent).

The public's views on the future relationship with the European Union:

- Almost two-thirds of voters (58 per cent) are in favour of the UK government being a constructive partner of the EU and forging a relationship that just works. There are no longer votes to be found in continued acrimony with the EU.
- Over two-thirds of voters (70 per cent) think that, over the medium term, the UK should have a closer relationship with the EU than what we have today, but only a third of the public think that the UK should seek membership of the EU single market at the minimum.
- A majority of the public – including Leave voters – overwhelmingly supports a better-functioning relationship with the EU. There is wide public support for closer cooperation on fighting crime and

terrorism (net +81 per cent), trade and border arrangements (+77 per cent), Northern Ireland (+68 per cent), and cooperation on foreign policy (+66 per cent).

- When considering trade-offs, British voters are pragmatic about what might be required to forge a better relationship with the EU and show readiness to compromise if their choices can be shown to benefit them. There is overwhelming public support (65 per cent) for voluntarily aligning with EU regulations in areas where it would lead to lower prices for consumers, as well as for accepting a limited future role for the European Court of Justice (60 per cent) if it improves the ability of UK police to keep Britain secure.
- A significant majority of the British public (54 per cent) – including most Leave voters – supports stricter domestic regulatory protections post-Brexit, even if this means a limited ability to sign a trade deal with a major economy like the United States. To the extent there is any appetite for a race to the bottom on regulation among the British public, it appears limited to one-fifth of all voters.
- There is little appetite among the British public for a preferential migration policy for European workers. Voters across the board, including just under half of Remainers (47 per cent), want European workers to be treated the same as other foreign workers.
- There remains a deep split between 2016 Leave and Remain voters. Most of the views of Leavers are mirrored by 2019 Conservative voters, while the views of Remainers are closely mirrored by 2019 Labour and Liberal Democrat voters.

This increased support for a different kind of relationship with the EU seems to be mostly driven by the changing attitudes among some 2016 Leavers, who appear to have become more unsure about the effects of Brexit. Within the next ten to 15 years, nearly one in five Leave voters (18 per cent) would either like the UK to re-join the EU or the single market and a further 45 per cent would like to see a closer relationship or see the UK in a new kind of association with the EU.

## Implications

In considering what these findings mean for future government policy and the UK's post-Brexit relationship with the EU, we suggest that:

- **There is a need for Britain's political leaders to openly acknowledge the immediate consequences of Brexit and set out a plan to fix them.** A substantial majority of the public, including Leave voters, think that Brexit has had a negative impact on their lives – and there is no political prize for shying away from the conversation about the costs of Brexit to date.
- **Little public support exists for deregulation away from high standards in the pursuit of future trade deals.** The British public overwhelmingly supports high standards on the environment, labour and social rights and food safety, even at the cost of not striking major trade agreements, suggesting that any deregulation agenda that lowers current protections will have extraordinarily low levels of

public support.

- **The British public is more pragmatic on Europe than is often portrayed by politicians and the media.** While the public does simply want to move on from debating Brexit, the data show that voters tend to evaluate the trade-offs inherent in different choices in a pragmatic way. The public deserves honesty and transparency from political leaders about what consequences future choices will entail.
- **Room is emerging in Britain for a new kind of public conversation about what a better post-Brexit relationship with the EU could look like.** This debate has to be focused on finding practical solutions to practical problems and must avoid starting from the position of revisiting the decision to leave the EU, or wishing to join the EU single market or the customs union. Otherwise, there is a clear – and acute – risk that most voters would see this as fighting old battles and disengage with the debate.
- **There is a growing political space to define a new type of relationship with the EU that works better and deepens bilateral relations – as long as it does not yet take the UK back into the European single market.** Voters wish to see improvements on key aspects of economic, security and strategic cooperation with the EU, but most would support finding a closer yet unique association that caters to the UK's interests.
- **The task of forging a better relationship with the EU will be left to a future Labour government.** The data suggest that there is little political space for 2019 Conservatives to radically diverge from the type of Brexit policy they have pursued to date as the preferences of their voters appear to closely mirror those of 2016 Leave voters. However, a large majority of progressive voters and about a third of Leave voters would be in favour of improving the current relationship with the EU, offering an opportunity for Labour to call for a different approach to rebuilding a relationship with the EU.

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## Introduction

The British public has now had over two years to consider how successful the departure from the European Union has been for the UK and how well the post-Brexit relationship is working in practice.

To test public attitudes to the consequences of Brexit and the new relationship with the EU, polling was conducted by JL Partners for the Tony Blair Institute among a representative sample of 2,078 adults between 21 and 22 September 2022. The polling was completed online and the data have been weighted to be nationally representative.

The data tables can be found [here](#).

JL Partners is an accredited member of the British Polling Council and Market Research Society, with offices in London and Washington, DC.



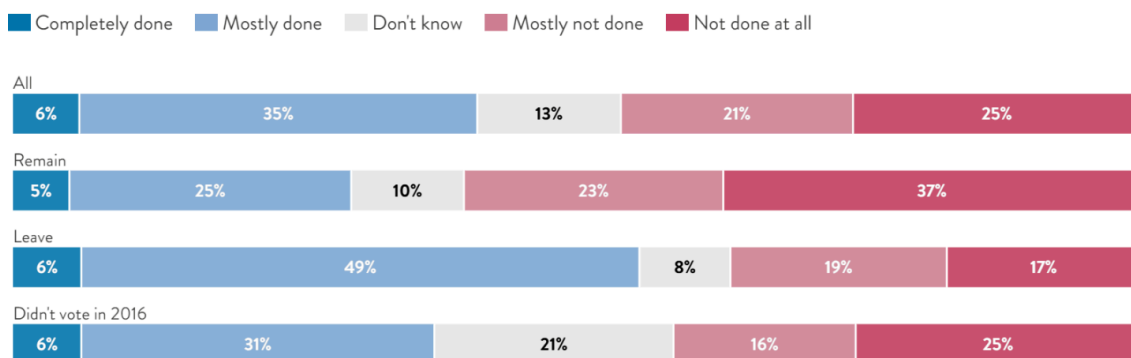
# The Present: How the British Public Views the Consequences of Brexit

## 1. Most Britons think Brexit is not “done”, including a third of Leave voters.

A majority of Britons think that Brexit is not “done”. Some two-fifths of voters view Brexit as either completely (6 per cent) or mostly done (36 per cent), against nearly half saying it is mostly not done (21 per cent) or not done at all (26 per cent). Two-thirds of Remain voters regard Brexit as “not done” and only one-third as “done”. Only 6 per cent of Leave voters regard Brexit as completely done, with 37 per cent saying it is mostly not done or not done at all – a significant percentage of those who voted for the UK to leave the EU in June 2016.

**Figure 1 – Remainders and Leavers are deeply split on the question of whether Brexit is “done”**

Survey question: *The UK government previously promised to “get Brexit done”. As far as you are concerned, is Brexit “done”?*



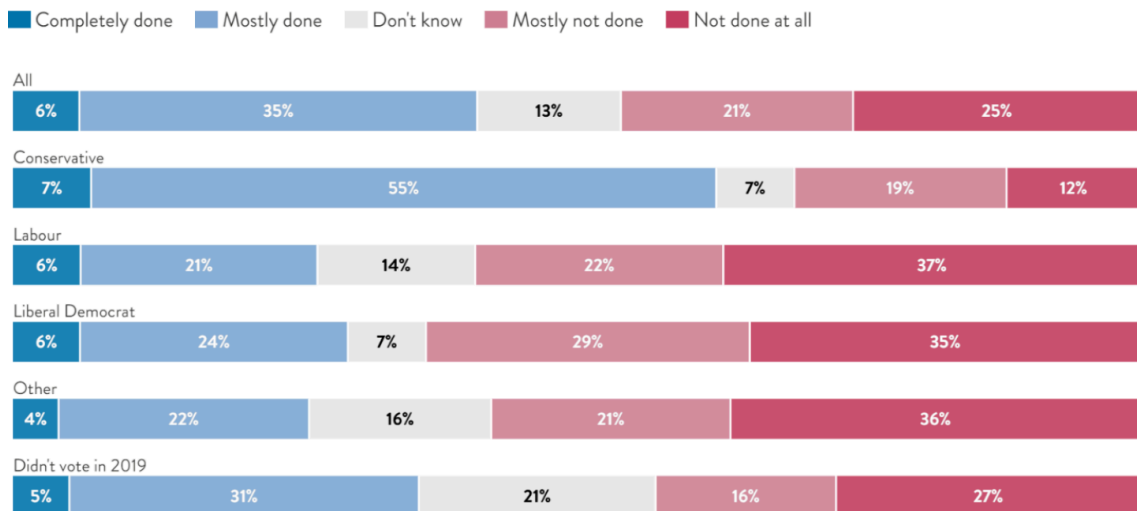
Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

There is a significant difference of view on whether Brexit is yet “done” between voters of major political parties. Nearly two-thirds (62 per cent) of Conservative voters regard Brexit as “done” compared to less than a third of Labour (27 per cent) and Liberal Democrat (29 per cent) voters.

**Figure 2 – Just as between Remainers and Leavers, there is a chasm between Conservative voters and those of other political parties on whether Brexit is “done”**

Survey question: *The UK government previously promised to “get Brexit done”. As far as you are concerned, is Brexit “done”?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

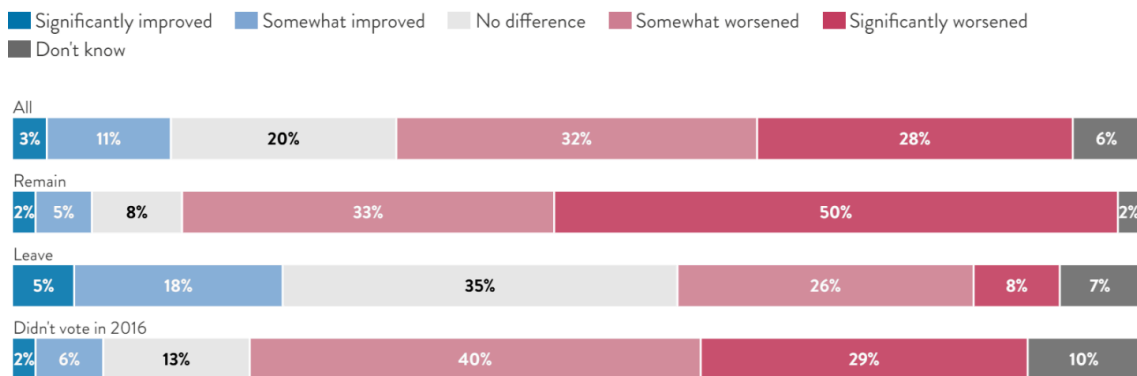
## 2. A significant majority of the public think that Brexit has worsened the UK’s economy.

Most Britons (59 per cent) think that Britain’s exit from the EU has worsened our economy, with 20 per cent thinking that it has made no difference and just 14 per cent seeing an improvement. Only a small percentage of the public (6 per cent) don’t know, meaning that voters have largely made up their minds about the economic effects of Brexit – and their views are mostly negative.

While there is a 2016 effect, with over four-fifths of Remainers thinking Brexit has worsened Britain’s economy, even Leavers are unenthusiastic about the economic effects of Brexit. Over two-thirds of Leavers say that it has either worsened the UK’s economy (34 per cent) or made no difference (35 per cent), compared to only about a quarter (24 per cent) who think that Britain’s economy has improved as a result of Brexit.

### Figure 3 – An overwhelming majority of Britons think that Brexit has made the UK’s economy worse

Survey question: Thinking about the impacts of Britain’s departure from the European Union, do you think it has improved, worsened or made no difference to Britain’s economy?



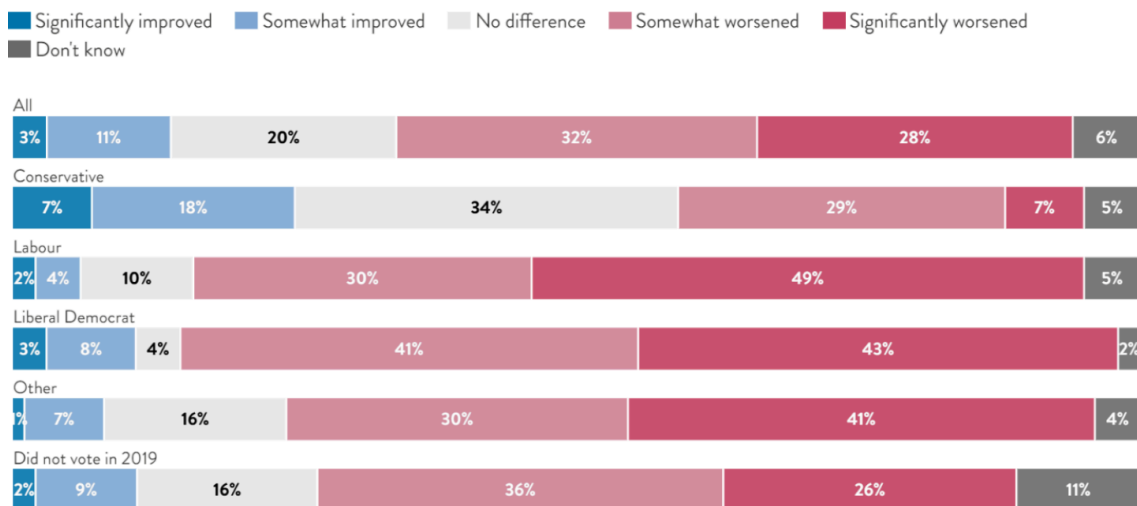
Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

The view that Brexit has worsened the economy overall is also shared among the 2019 voters of all major political parties, including the Conservatives (net -11 per cent), Labour (-74 per cent), Liberal Democrats (-72 per cent) and those who did not vote (-51 per cent). What is particularly notable is, on the one hand, the large gap between Conservative and other voters and, on the other, how closely 2019 Conservative voters mirror Leave voters in their perception of the consequences; their views are almost identical.

### Figure 4 – Most voters of all major political parties view Brexit as negative for the UK economy

Survey question: Thinking about the impacts of Britain’s departure from the European Union, do you think it has improved, worsened or made no difference to Britain’s economy?



Source: JL Partners.

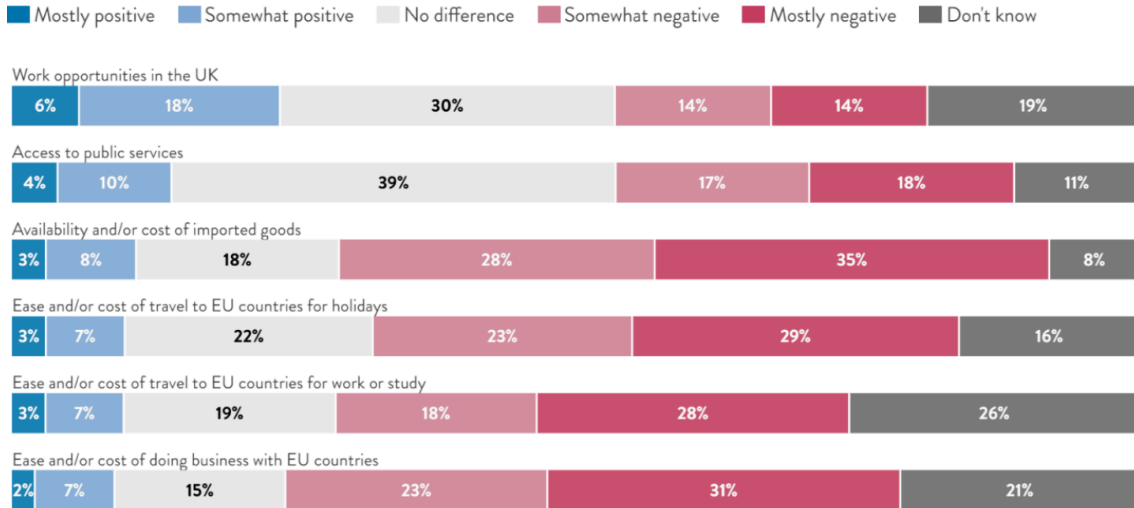
Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

### 3. Britons see negative effects of Brexit in most areas of their lives.

Voters were asked to assess the impacts of Brexit on different aspects of their lives, such as access to public services, availability of improved products, ease of travel and work opportunities. Across all areas, most voters regard Brexit to have had a negative effect. Of the given choices, they say that they have seen the most negative effects on the availability and/or cost of imported goods (net -52 per cent), followed by ease and/or cost of doing business with EU countries (-45 per cent) and ease and/or cost of travel to EU countries for holidays (-43 per cent). The least negative preference was access to work opportunities (-5 per cent).

## Figure 5 – Britons see negative effects of Brexit in most areas of their lives

Survey question: How would you describe the impacts of Brexit on the following aspects of your life?



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

Looking beneath the headline figure, there is a marked difference in the perception of the impacts of Brexit between Remainers and Leavers – for example, 83 per cent of Remainers think Brexit has had a negative impact on the availability and/or cost of imported goods against 42 per cent of Leavers. The views of Leavers correspond almost fully to the views of 2019 Conservative voters; similarly, those of 2016 Remain voters align to 2019 Labour and Liberal Democrat voters.

Asked to describe Brexit in a word in an open-ended question, the most popular response, chosen by 10 per cent of respondents, was “disaster”, followed by “freedom” (5 per cent) and “shambles” (4 per cent). Many negative responses focused on possible racist, xenophobic and nationalist motivations for Brexit, as well as the idea that politicians lied during the 2016 referendum campaign. Positive responses focused predominantly on freedom from EU interference, with a large number of people also stressing that Brexit was as yet incomplete or had not delivered its full potential.

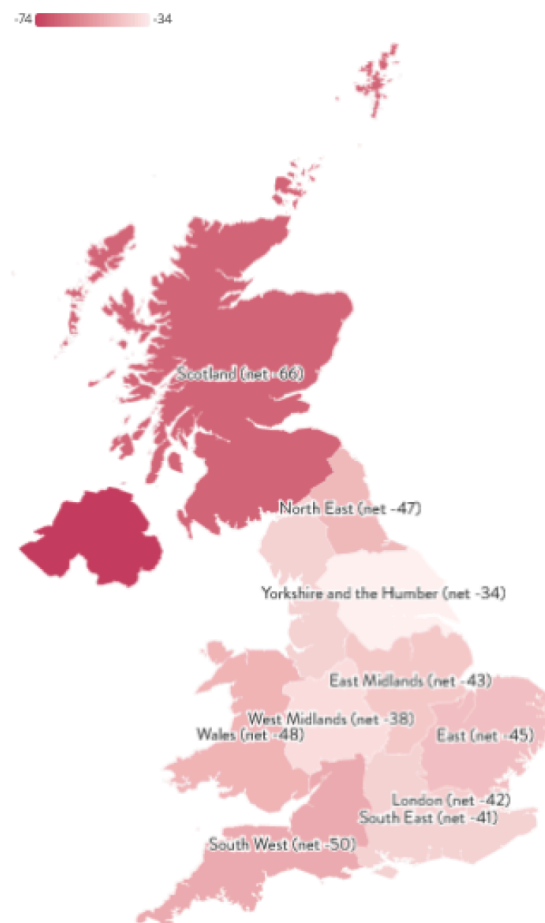


Wales (-48 per cent) and the North East of England (-47 per cent). Most notably, the impacts are also seen as negative in parts of the “red wall” in the North East of England, which historically tended to support the Labour Party but uncharacteristically supported the Conservatives in the 2019 general election.

A similar pattern is observed for voters who were asked whether they view Brexit as “done”. Most voters in Northern Ireland (net -72 per cent), Scotland (-25 per cent) and the North East of England (-16 per cent) view Brexit as not yet “done”. By contrast, it is seen as mostly “done”, albeit by a very small margin, in the West Midlands (net +7 per cent), the South West of England (+5 per cent), and in Yorkshire and the Humber and the East of England (both +2 per cent).

**Figure 7 – There are significant differences across the UK’s regions both in terms of the impacts of Brexit (left) and perception of whether Brexit is “done” (right)**

Survey question (left): Thinking about the impacts of Britain’s departure from the European Union, do you think it has improved, worsened or made no difference to Britain’s economy?



Survey question (right): The UK government previously promised to “get Brexit done”. As far as you are concerned, is Brexit “done”?



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

### 5. Over a third of voters do not expect any benefits from Brexit.

About two-thirds of voters expect at least some benefits from Brexit, with just over a third not seeing any benefits at all. Almost two-thirds (63 per cent) of Remainers and 11 per cent of Leavers expect no benefits from the UK’s departure from the EU.

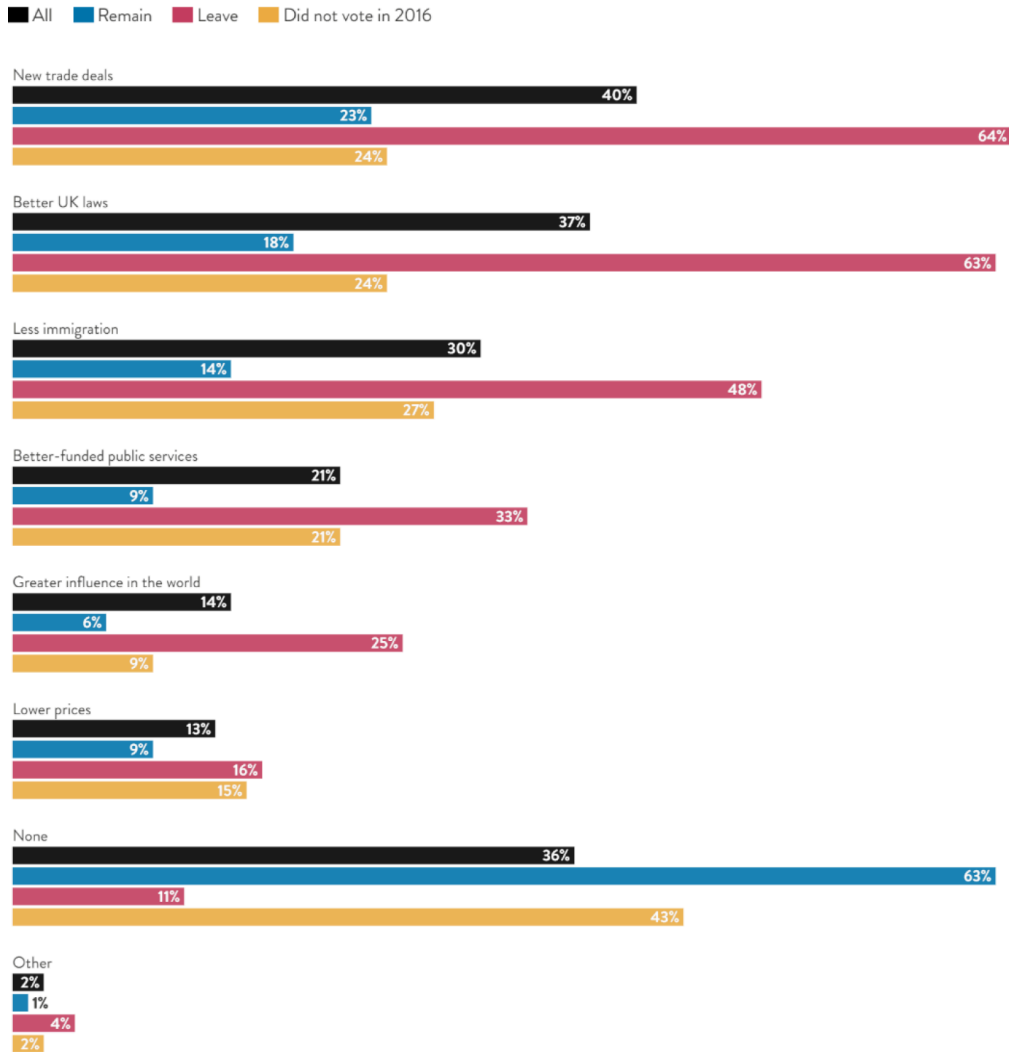
New trade deals are seen as the most likely benefit of Brexit, with 40 per cent of voters expecting benefits in this area, followed by better UK laws (37 per cent) and less immigration (30 per cent). Only



13 per cent expect lower prices as a result of Brexit and 14 per cent expect greater influence in the world. It is particularly notable that few voters view a link between the UK's ability to have an independent trade policy and its economic benefit.

**Figure 8 – New trade deals are seen as the main benefit of Brexit**

**Survey question: In which of the following areas do you expect there to be benefits of Brexit?**



Source: JL Partners.

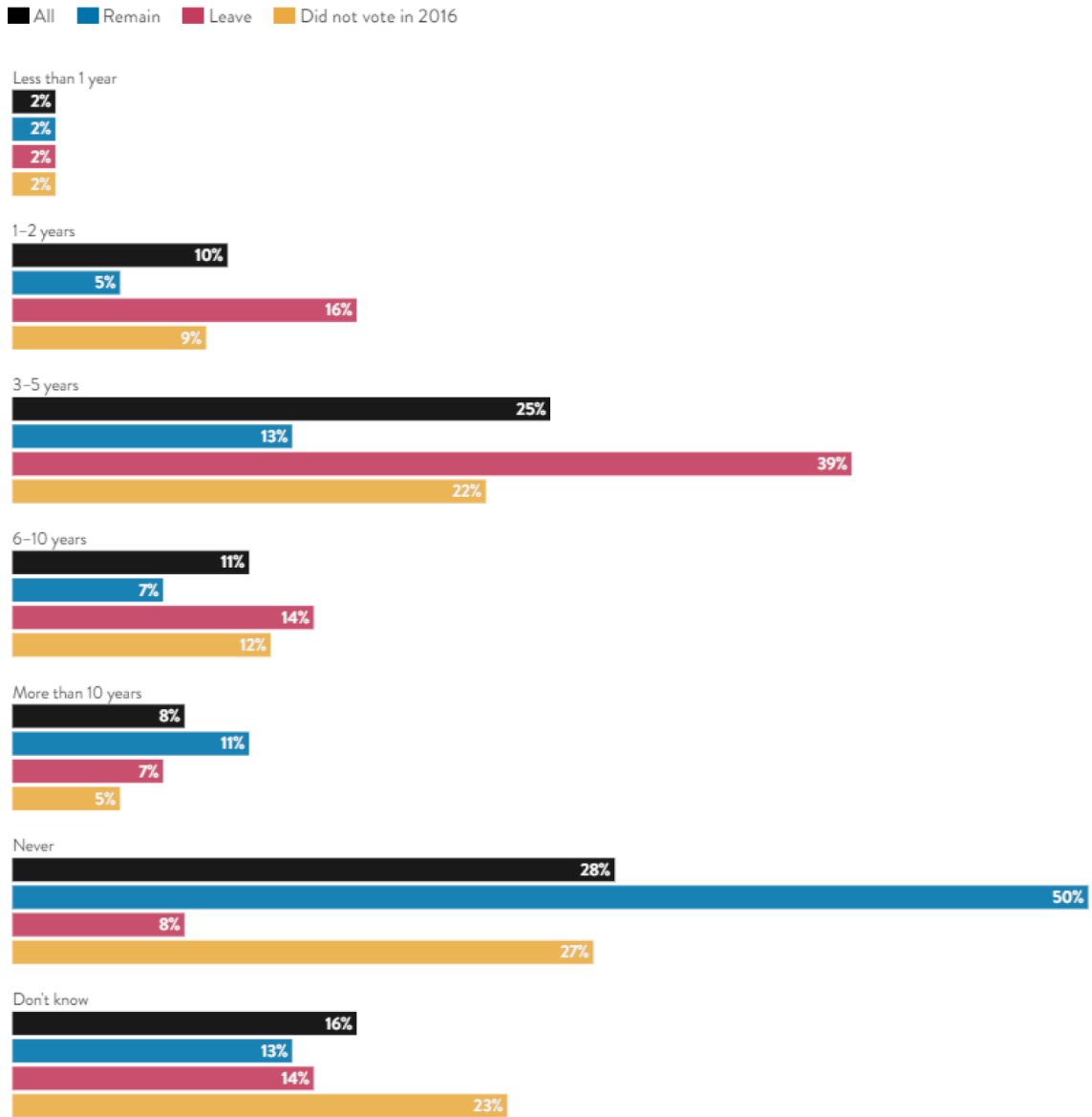
Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

When asked about when to expect the benefits of Brexit, most people take a medium-term view. Just 12 per cent think that we will see the benefits within the next two years; 25 per cent in the next three to five years; 11 per cent in the next six to ten years; and 8 per cent say more than ten years. Nearly a third

(28 per cent) say never, corresponding roughly to the group of voters who say that they do not see any benefits of Brexit at all.

**Figure 9 – Remainers and Leavers are split over what timeframe the benefits of Brexit may accrue, with most Leavers expecting benefits within the next three to five years**

Survey question: *In your view, how long will it take before we see the benefits of Brexit?*



Source: *JL Partners*.

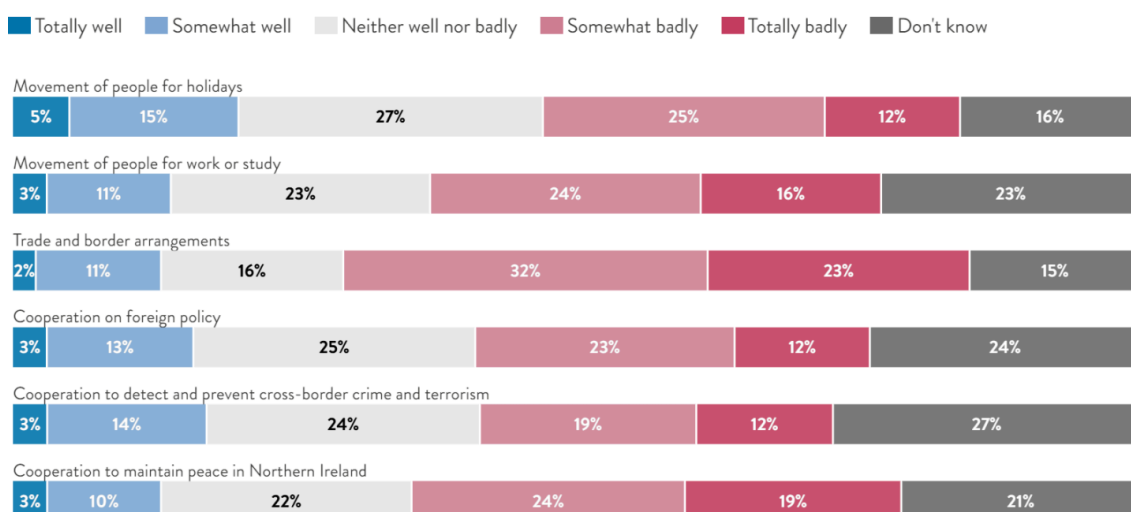
Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

## 6. Most of the public think that the post-Brexit relationship with the EU is functioning badly in all core areas, but especially on trade and Northern Ireland.

The public thinks the post-Brexit relationship with the EU is working badly in each of the six areas they were asked about, but especially on trade and borders (net -42 per cent), Northern Ireland (-29 per cent), movement of people for work and study (-26 per cent), foreign policy (-19 per cent), holidays (-18 per cent), and cooperation to prevent crime and terrorism (-13 per cent).

**Figure 10 – The current relationship with the EU is seen to be mostly working badly by voters**

Survey question: *How well or badly do you think the post-Brexit relationship with the European Union and its member states is working in each of the following areas?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

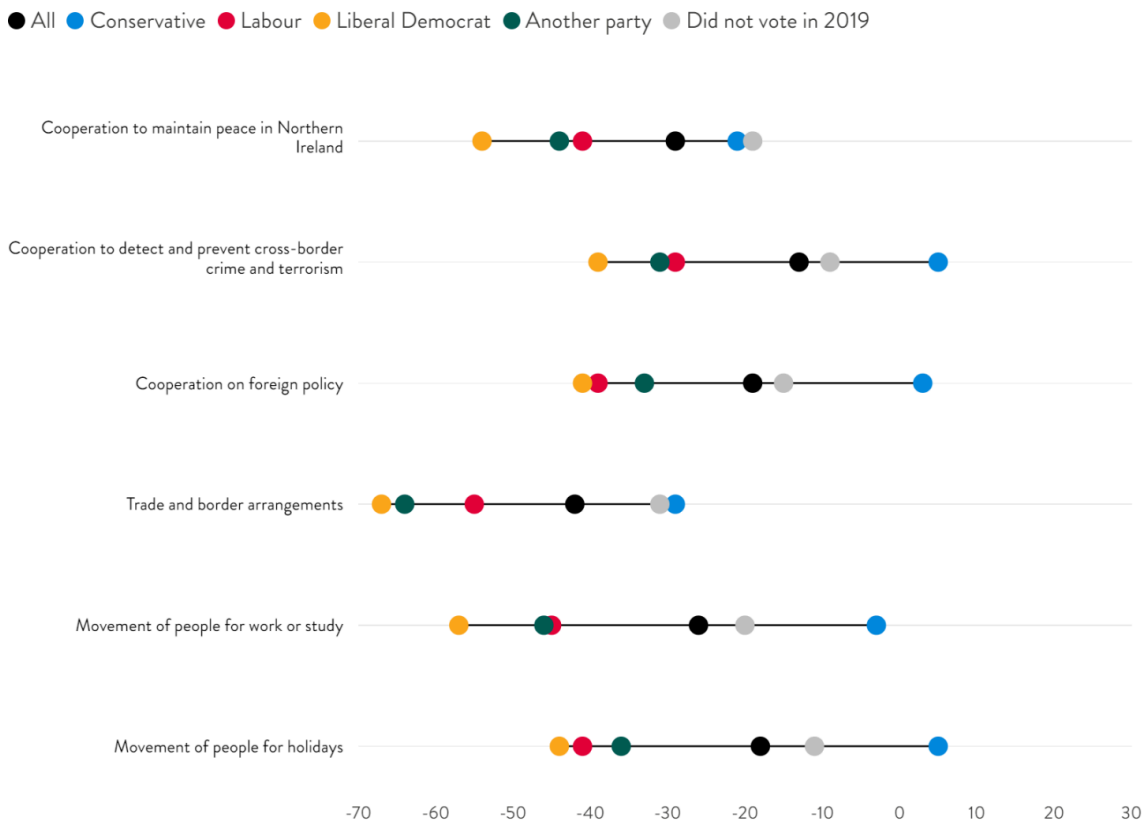
The view that the current relationship with the EU is not working is shared by voters of almost all political parties.

Across all areas, Labour and Liberal Democrat voters state that the relationship is working badly overall. Conservative voters say that the relationship is working badly on trade (net -29 per cent) and with respect to maintaining peace in Northern Ireland (-21 per cent). However, they say the relationship with the EU is working well on the whole in terms of movement of people for holiday (+5 per cent), cooperation to detect and prevent cross-border crime (+5 per cent), and cooperation on foreign policy

(+3 per cent). As in many other questions, there is a deep split between Remain and Leave voters' views of how well the relationship with the EU is working.

**Figure 11 – Voters of all major parties share the view that the current relationship with the EU is mostly working badly**

Survey question: *How well or badly do you think the post-Brexit relationship with the European Union and its member states is working in each of the following areas?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

**7. Most voters want the British government to be a constructive partner of the EU and have a relationship that just works.**

We asked the public what they regarded as the immediate priorities for the British government in dealing with the EU.

Most of the public favours a more constructive attitude towards the EU, with nearly two-thirds of voters (58 per cent) in favour of moving on from unfriendly relations and building a relationship with the EU that works, followed by over half of voters (55 per cent) in favour of working with the EU on shared challenges and sorting out problems with the Northern Ireland Protocol (55 per cent). Less than half of voters (45 per cent) say that the British government’s priority should be to “defend Britain’s ability to make its own decisions and laws” and just over a third (39 per cent) say that it should be to “treat the European Union like any other international partner”.

**Figure 12 – Most of the public support being a constructive partner of the EU**

Survey question: *What do you think should be the priorities of the British government in dealing with the European Union today?*



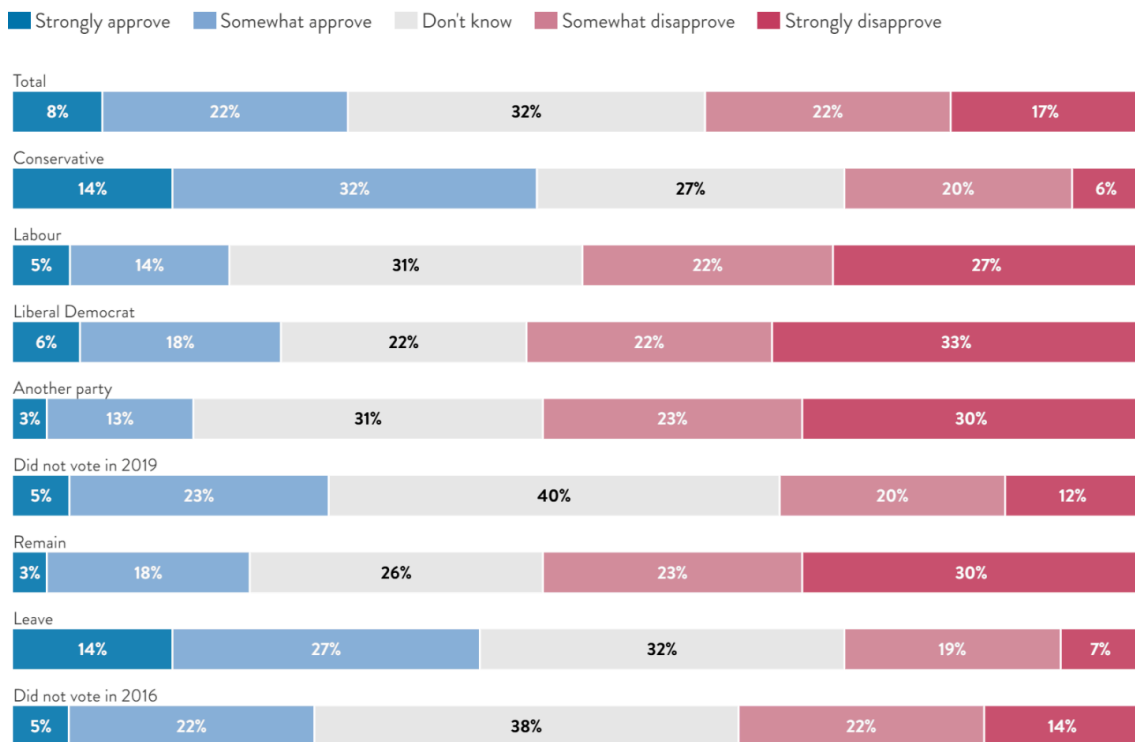
Source: *JL Partners.*

Note: *Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.*

When asked specifically about the British government’s approach to changing the Northern Ireland Protocol – a part of the withdrawal treaty that governs how Northern Ireland trades with the EU and avoids a new border on the island of Ireland – there is weak net disapproval (-8 per cent) for the government changing the Protocol in such a way that would fix practical problems but cause a trade conflict with the EU. A third of voters do not have a view on the issue, however. Remainers and Leavers are clearly split on this issue, with 2019 Conservative voters mirroring the views of Leavers, just as Labour and Liberal Democrat voters mirror the position of Remainers.

**Figure 13 – Most voters disapprove of the UK government unilaterally changing the Northern Ireland Protocol if it leads to a trade conflict with the EU – but Leavers think otherwise**

Survey question: *If the UK government were to change the Northern Ireland Protocol in such a way that fixes practical problems with that agreement but in turn causes a trade conflict with the European Union, potentially hitting businesses and consumers, how far do you approve or disapprove of this decision?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

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## The Future: What the British Public Wants from the Post-Brexit Relationship with the European Union

We also tested the public's attitudes and expectations of how Britain's relationship with the EU might evolve in the future.

### **8. Europe is seen as the UK's most important international partner – and this is unlikely to significantly change in the medium term.**

Almost four in ten respondents (39 per cent) agreed that the UK's relationship with Europe is our most important, with 21 per cent opting for the US and 19 per cent for the Commonwealth. This makes the UK about equally split between those who see our most important links with Europe and those who look elsewhere.

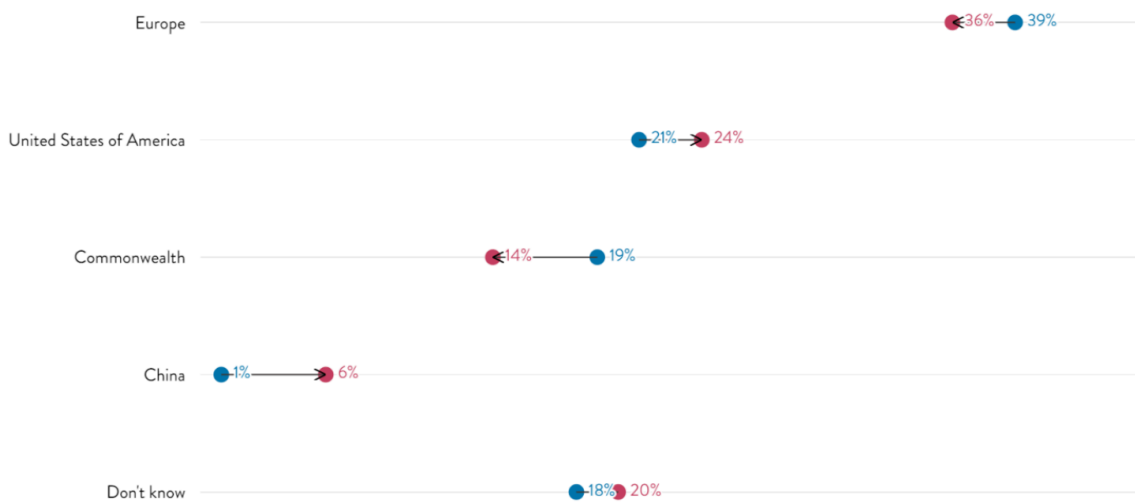
When asked about what international partner will be the UK's most important in the next 10–15 years, most of the respondents (36 per cent) still expect it to be Europe, even though it is down by 3 percentage points from today. The Commonwealth is significantly less popular with 14 per cent, but the US and China are expected to be more important, with an increase of 3 and 5 percentage points, respectively.



**Figure 14 – Most of the public views Europe as the most important international partner today and in the medium term**

Survey questions: Which of these relationships is the most important to the United Kingdom today? And Which of these relationships do you think will be the most important to the United Kingdom in the next 10–15 years?

● The most important relationship today ● The most important relationship in the next 10–15 years



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

Many of the differences reflect the 2016 referendum vote, with 59 per cent of Remainers selecting Europe as our most important relationship against just 22 per cent of Leavers, who opt instead for the Commonwealth (30 per cent) and the US (26 per cent). Only 26 per cent of those who voted Conservative in 2019 think Europe is our most important relationship against 53 per cent of Labour supporters and an overwhelming majority (60 per cent) of Liberal Democrats.

There are striking regional differences here. The choice of Europe is highest in Scotland (51 per cent) and London (47 per cent), with the strongest preference for the US in Northern Ireland (29 per cent) and for the Commonwealth in the East Midlands (29 per cent).

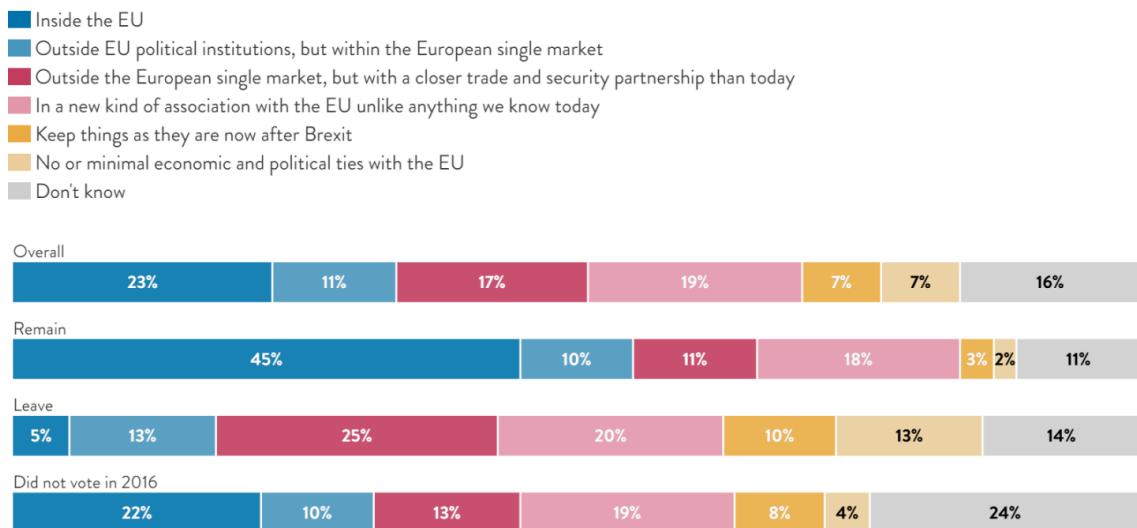
**9. Over two-thirds of voters think the UK should be in a closer relationship with the EU over the medium term, but only a third are in favour of the single-market type arrangement.**

When asked what the UK’s place within Europe should be in the next 10–15 years, just under a quarter (23 per cent) say “inside the European Union”. This is followed by a preference for “a new kind of association with the European Union unlike anything we know today” (19 per cent), a relationship “outside the European single market, but with a closer trade and security partnership than today” (17 per cent) and “outside EU political institutions, but within the European single market” (11 per cent). Only 7 per cent of the public wishes to “keep things as they are now after Brexit” and another 7 per cent would prefer “no or minimal economic and political ties with the European Union”.

Overall, about a third of the public favour at least the single-market type relationship with the EU. Another third favour a closer relationship than today while remaining outside the EU and the single market, but do not have a clear idea of what that relationship might entail.

**Figure 15 – Over two-thirds of all voters want a different and closer relationship with the EU than today**

Survey question: *Of the following options, which one would you choose for the UK’s place within Europe in the next 10–15 years?*



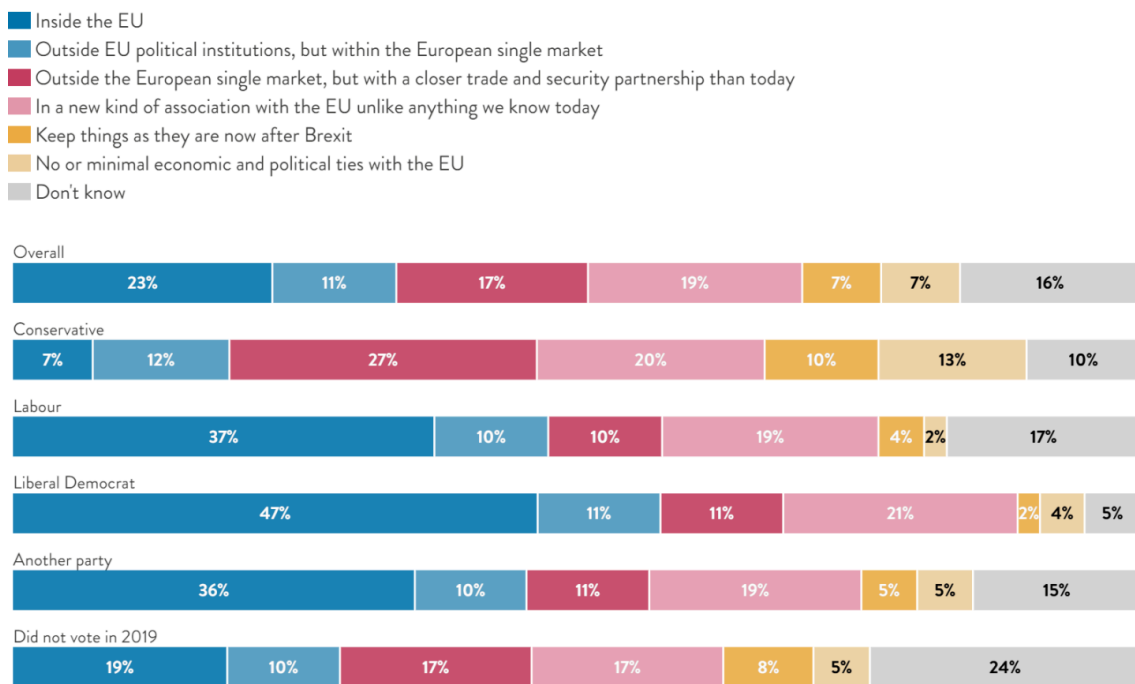
Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

There is widespread support for a closer relationship with the EU across all major voter groups, including 2019 Conservative voters. Over half of Labour and Liberal Democrat voters would be at least in favour of re-joining the EU single market, but there is a significant group within both voter groups who do not wish to re-join the EU or the single market but wish to forge a closer kind of relationship outside existing institutions.

**Figure 16 – Support for a closer medium-term relationship is shared across all major political parties**

Survey question: *Of the following options, which one would you choose for the UK's place within Europe in the next 10–15 years?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

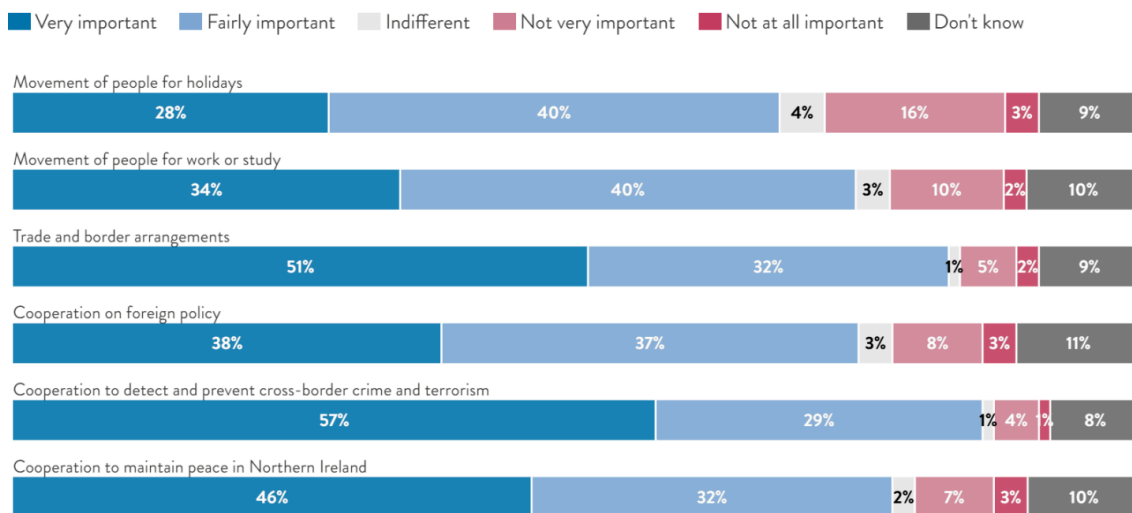
## 10. The public overwhelmingly supports a closer relationship with the EU, especially on security matters and trade.

We asked the public how important it is to have a closer relationship with the EU on key issues. On each of these six issues, the public is highly supportive of a closer relationship, especially on cooperation to fight crime and terrorism (net +81 per cent), trade and border arrangements (+77 per cent), Northern

Ireland (+68 per cent), cooperation on foreign policy (+66 per cent), movement of people for work and study (+62 per cent), and movement of people for holidays (+49 per cent).

**Figure 17 – Most voters support closer cooperation with the EU**

Survey question: *How important, if at all, do you think it is for the UK to have a closer relationship with the European Union and its member states in each of the following areas?*



Source: JL Partners.

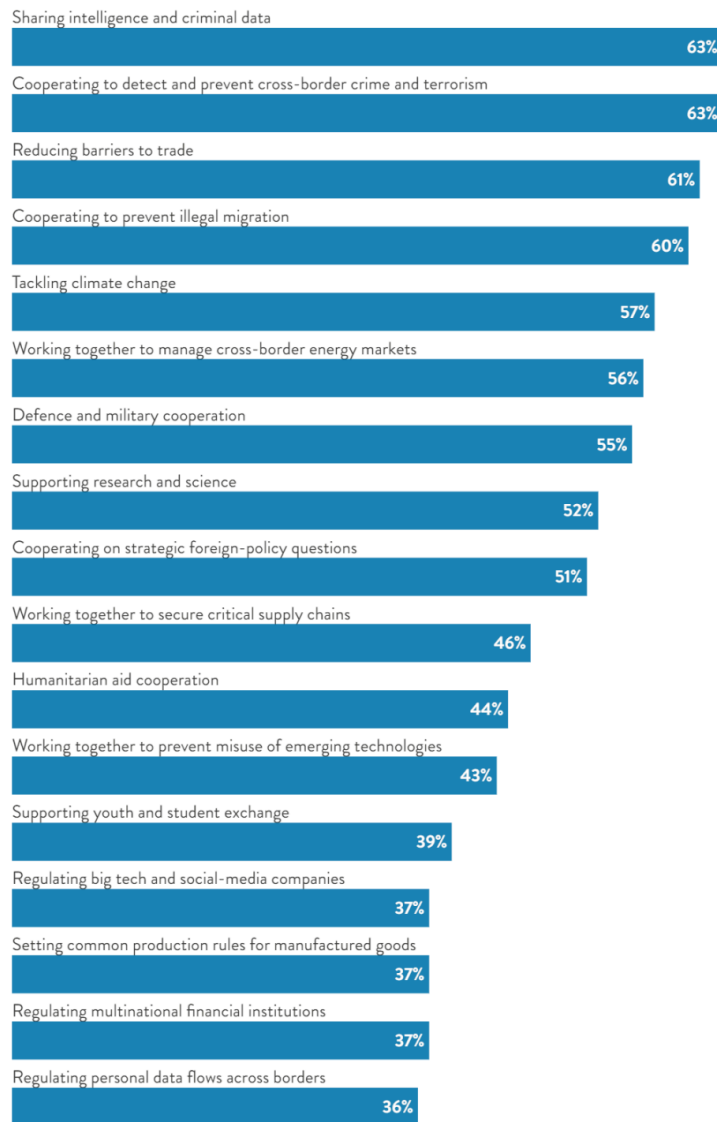
Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

## II. There is public support for active cooperation with the EU across most areas of bilateral cooperation, particularly on security matters, but less so on regulatory questions.

When asked about support for specific areas of cooperation, over half the public support cooperation with the EU on nine of the 17 topics considered; just 2 per cent do not support cooperation on any of these topics. There is most support for cooperation on sharing intelligence and criminal data (63 per cent), preventing crime and terrorism (63 per cent), reducing barriers to trade (61 per cent), and preventing illegal migration (60 per cent). By contrast, the least support is for cooperation on regulatory matters: cooperation on regulation of big tech and social media companies, of manufactured goods, and financial institutions each receive just 37 per cent support, with 36 per cent support for regulation on personal data.

**Figure 18 – Most of the public support bilateral cooperation with the EU across key areas of policy**

Survey question: *Of the following types of cooperation, which ones do you support the UK having with the European Union and its member states in the future?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

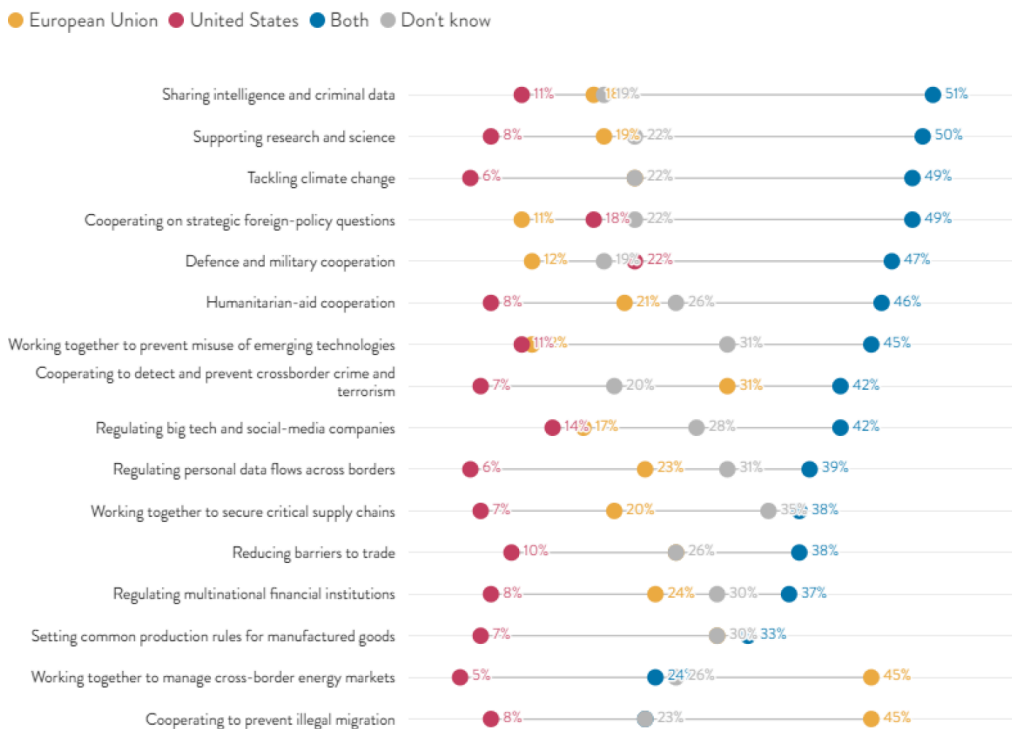
## 12. Across most areas of bilateral cooperation, the public believes the UK's interests are as aligned with the EU as with the US.

Across areas of bilateral cooperation, we also asked the public whether they think the UK's interests are more aligned with the EU, the US, or both.

On all but three of these 17 issues, a plurality opted for "both". On 15 of these 17 issues, more people say we are more aligned with the EU than say we are more aligned with the US. A plurality say the UK's interests are more aligned with the EU on preventing illegal migration, youth and student exchange, and managing cross-border energy markets. The cases where more thought the country's interests were more aligned with the US than the EU were strategic foreign policy issues and defence cooperation.

**Figure 19 – In most areas, the public sees the UK's strategic interests aligned with both the European Union and the United States**

Survey question: *In each of the following areas, do you think Britain's interests are more aligned with the European Union or the United States, or both?*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

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## The Choices: What the British Public Actually Wants from the Future Relationship with the European Union

The analysis in the previous section illustrates the growing view among Britons that closer relations with the European Union would be desirable in the future. However, one of the difficulties during the Brexit process was that the closeness of relations raises difficult trade-offs around the UK's regulatory autonomy, and once those trade-offs were brought into focus the public's view was less certain.

We therefore asked voters about how their views on a closer relationship with the EU change when they are presented as a discrete choice. Of course, these choices are not fully indicative of the actual choices voters would make, but they offer a clearer idea of how voters would decide when presented with a binary choice, and how this might vary across voter groups.

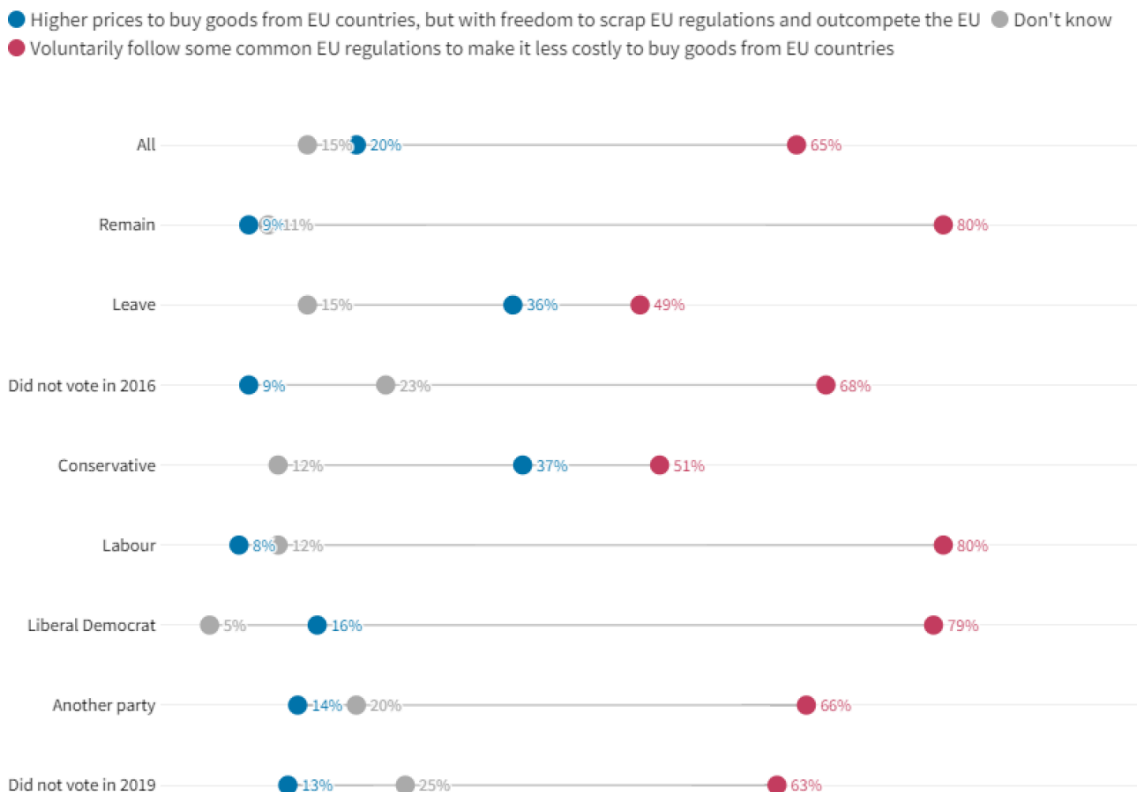
### **13. Most of the public would choose to voluntarily align to EU rules where it is in the UK's interest, trading some regulatory autonomy for lower prices.**

We asked the public whether they would choose to voluntarily follow EU regulations if that would mean cheaper imports, or accept higher prices in return for regulatory freedom.

There is a strong preference for voluntarily following EU regulations if that means cheaper imports, with 65 per cent support compared to 20 per cent who prefer higher prices and regulatory freedom. There is a stronger preference for lower costs and regulatory conformity among 2016 Remainers (80 per cent against 10 per cent for higher prices and regulatory freedom), with Leavers agreed overall but considerably more divided at 49 per cent supporting more regulation and cheaper EU imports to 36 per cent supporting less regulation and more expensive EU imports. It is significant that even most Leavers preferred to follow some EU regulations in order to make prices lower.

**Figure 20 – All voter groups – including Leavers – would prefer voluntarily following some EU regulations if it made the cost of trade cheaper**

Survey question: Of the following two considerations, please choose which one you prefer most: (a) Higher prices to buy goods from EU countries, but with freedom to scrap EU regulations and outcompete the European Union; (b) Voluntarily follow some common EU regulations to make it less costly to buy goods from EU countries; (c) Don't know



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

**14. There is a weak preference among voters to sacrifice an independent trade policy for less administrative burden in trade with the EU – but not among Leavers.**

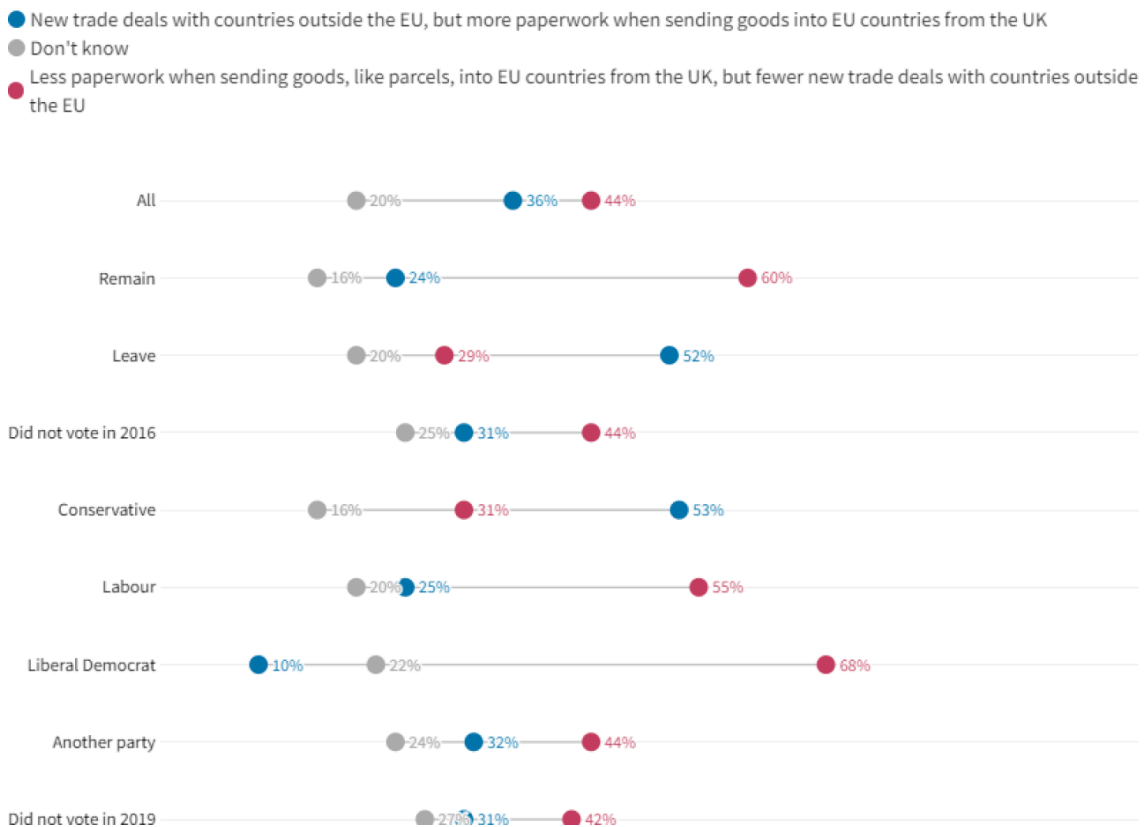
We also tested how much appetite there would be for a far-reduced administrative burden in trade with the EU relative to fewer trade agreements with the rest of the world, in effect asking voters whether they would prefer an independent trade policy or fewer cost hurdles in trade with the UK's biggest international partner.



There is a weak preference for less paperwork in trade with the EU with an acceptance of fewer trade deals with non-EU countries (44 per cent to 36 per cent), but views on the question differ across voter groups. There is strong disagreement between 2016 Remainers and Leavers. Among Remainers, 60 per cent opt for less paperwork with the EU and 24 per cent opt for more non-EU trade deals whereas 52 per cent of Leavers opt for new trade deals and 29 per cent opt for easing trade with the EU. Similarly, the views of 2019 Conservative voters are the opposite of voters from other political parties.

**Figure 21 – Voters prefer less paperwork in trade with the EU than more trade deals with the rest of the world**

Survey question: *Of the following two considerations, please choose which one you prefer most: (a) Less paperwork when sending goods, like parcels, into EU countries from the UK, but fewer new trade deals with countries outside the European Union; (b) New trade deals with countries outside the European Union, but more paperwork when sending goods into EU countries from the UK; (c) Don't know*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

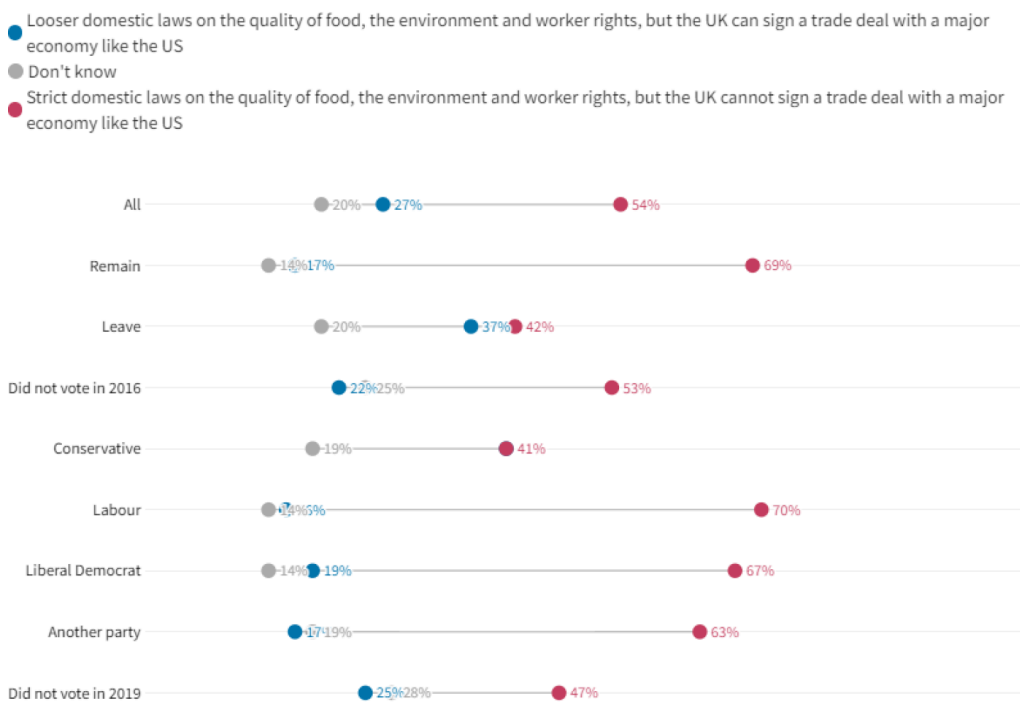
**15. There is widespread public support for maintaining high regulatory standards, even if this means a more constrained trade policy, including among Leavers.**

There is strong public support for stricter regulation on food, the environment and worker rights over the ability to sign trade deals with major economies, with over a half of the public (54 per cent) supporting stricter domestic regulations over the ability sign a trade deal with a major economy, like the US. The latter option had support from just less than a third of the public (27 per cent).

Most notably, 2016 Leavers are almost equally divided, with 42 per cent preferring stricter regulation and 37 per cent opting for fewer regulations in return for more trade deals.

**Figure 22 – A significant majority of voters support stricter domestic regulations even if it meant a more constrained ability to agree new trade deals**

*Survey question: Of the following two considerations, please choose which one you prefer most: (a) Strict domestic laws on the quality of food, the environment and worker rights, but the UK cannot sign a trade deal with a major economy, like the US; (b) Looser domestic laws on the quality of food, the environment and worker rights, but the UK can sign a trade deal with a major economy, like the US; (c) Don't know*



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

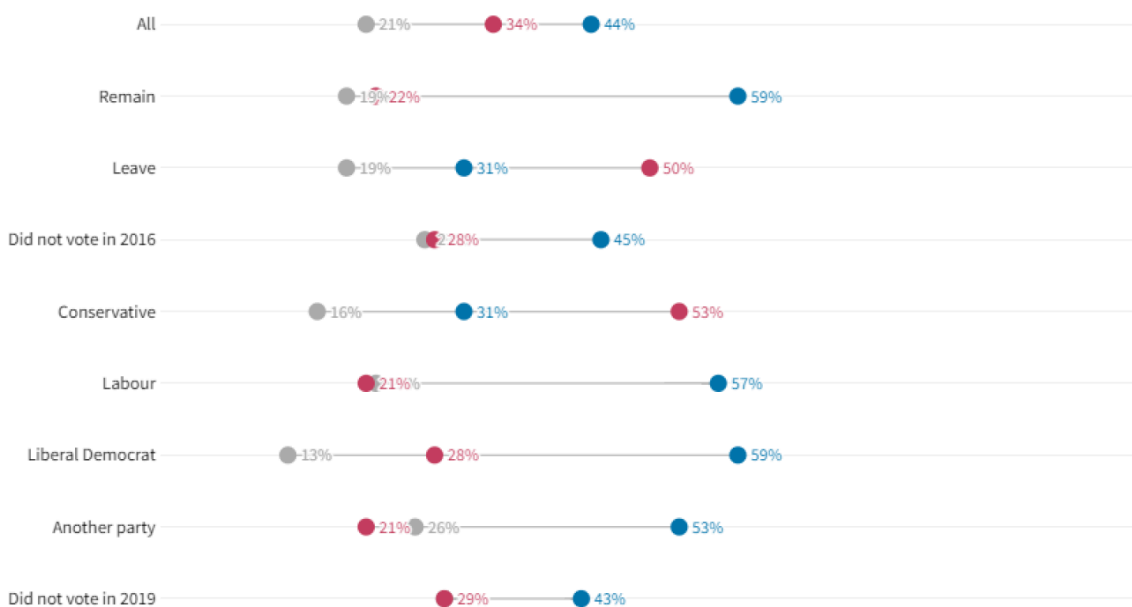
Relatedly, when voters were presented with a choice of whether to make trade with the EU cheaper for less competitiveness in global markets or prioritise global competitiveness and accept more expensive trade with the EU, there is a weaker preference for the former. Less than a half of voters (44 per cent) would prefer less expensive EU trade and less global competitiveness compared to 34 per cent who prefer more expensive EU trade in exchange for more competitiveness in global markets.

There is a divide between 2016 Remainers and Leavers, with the former opting to minimise trade costs with the EU (59 per cent to 22 per cent who prefer global competitiveness), but the latter preferring competitiveness on global markets (50 per cent to 31 per cent who opt for less expensive trade with the EU).

**Figure 23 – Most voters do not support domestic deregulation that makes trade EU trade more costly even if UK firms gain an advantage in global markets**

Survey question: Of the following two considerations, please choose which one you prefer most: (a) Change domestic regulations in such a way that makes trade with EU countries more expensive, but UK firms are more competitive in global markets than EU firms; (b) Change domestic regulations in such a way that makes trade with EU countries less expensive, but UK firms are no more competitive in global markets than EU firms; (c) Don't know

- Change domestic regulations in such a way that makes trade with EU countries less expensive, but UK firms are no more competitive in global markets than EU firms
- Don't know
- Change domestic regulations in such a way that makes trade with EU countries more expensive, but UK firms are more competitive in global markets than EU firms



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

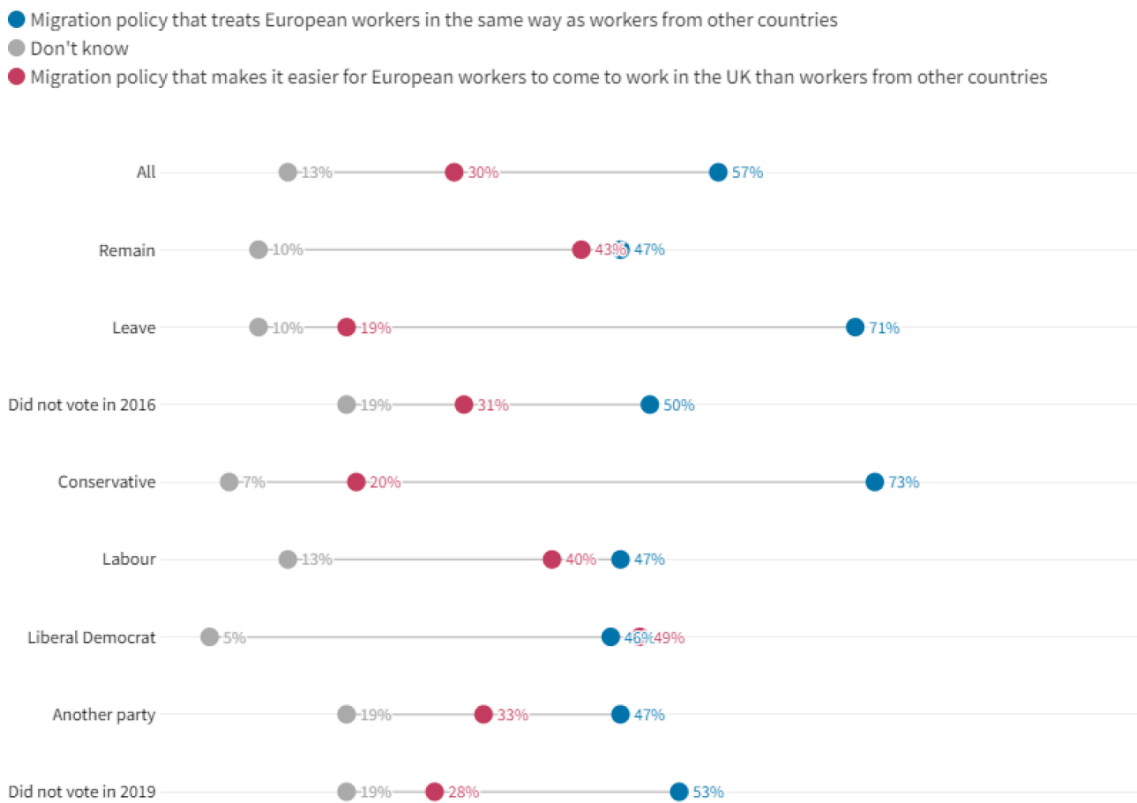
## 16. On immigration, there is little public support for a preferential policy for European workers.

A significant majority of voters (57 per cent) would choose migration policy that treats European workers in the same way as workers from other countries over a more preferential policy for EU workers. This suggests public support for a uniform UK migration policy that treats all workers equally.

Importantly, 2016 Remainers and Leavers agree on this point, but the former are much more divided. While Leavers prefer to treat European migrants the same as those for the rest of the world by 71 per cent to 19 per cent who prefer a preferential policy for the EU, the margin for Remainers is a mere 47 per cent to 43 per cent.

**Figure 24 – Most voters prefer a migration policy that treats workers from all countries the same**

Survey question: Of the following two considerations, please choose which one you prefer most: (a) Migration policy that makes it easier for European workers to come to work in the UK than workers from other countries; (b) Migration policy that treats European workers in the same way as workers from other countries; (c) Don't know



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

**17. The public support a role for the European Court of Justice in the UK post-Brexit if it means a more secure country.**

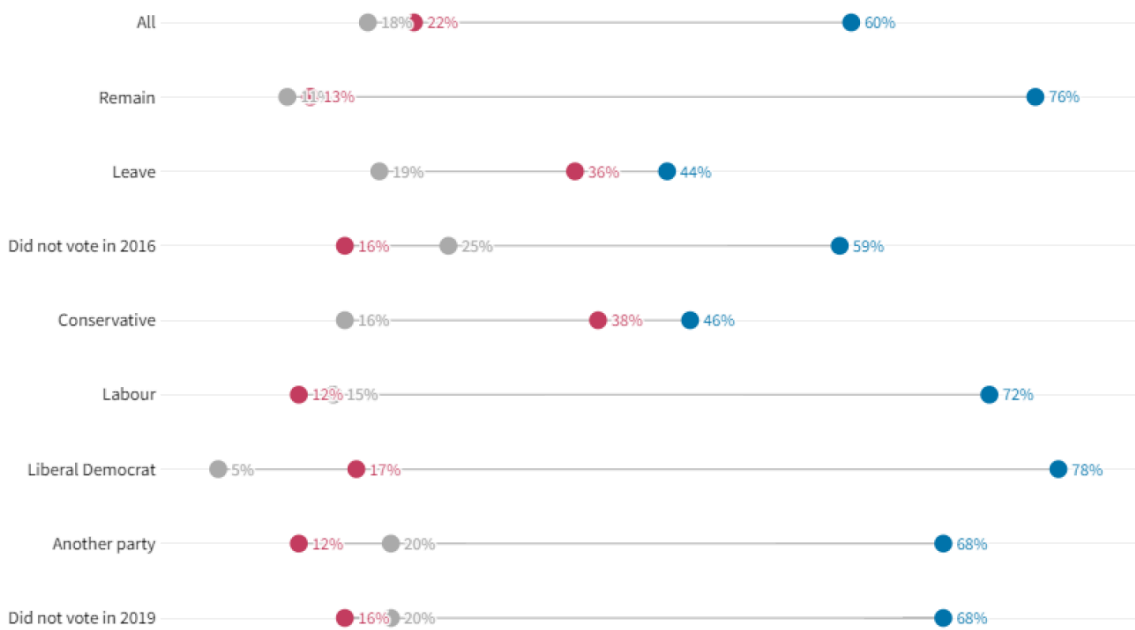
We showed through some of our previous questions a clear public preference to maintain close cooperation with the EU on security matters. But we also wanted to test if the public would support such a close arrangement if it involved some continued role for the Court of Justice of the EU (CJEU) in the UK after Brexit, as access to the EU security databases typically requires.

There is a strong preference (60 per cent to 22 per cent) for prioritising realtime access to EU databases that help detect criminals over eliminating any role for the CJEU in the future. Importantly, this is one area where 2016 Remainers and Leavers agree, but the former show a much stronger margin of preference – 76 per cent to 13 per cent, against Leavers’ 44 per cent to 36 per cent.

**Figure 25 – There is overwhelming public support for keeping access to EU security databases even if it means some limited role for the European Court of Justice**

Survey question: *Of the following two considerations, please choose which one you prefer most: (a) UK police loses realtime access to EU databases that help detect criminals, but the European Court of Justice has no role in domestic affairs; (b) UK police keeps realtime access to EU databases that help detect criminals, but the Government accepts a limited role for the European Court of Justice in domestic affairs; (c) Don't know*

- UK police keeps realtime access to EU databases that help detect criminals, but the government accepts a limited role for the European Court of Justice in domestic affairs
- Don't know
- UK police loses realtime access to EU databases that help detect criminals, but the European Court of Justice has no role in domestic affairs



Source: JL Partners.

Note: Due to rounding of the polling data, there may be marginal variations between data visualisations and figures quoted in the text.

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## Conclusion

It is indisputable that Brexit is “done” at least in one sense – the UK is now outside the EU and its political and economic institutions. However, as our analysis shows, the consequences of Brexit are visible for most of the public and the debate over what kind of future relationship the UK should have with the EU post-Brexit is not yet over.

We find that:

- Brexit is regarded as largely negative by a substantial majority of the public – including a far-from-negligible proportion of Leavers and 2019 Conservative voters.
- A large proportion of the British public is supportive of forging a closer relationship with the EU post-Brexit, especially on security matters and trade, but there is still reluctance from most of the public to go as far as re-joining the EU single market.
- The British public is pragmatic in the choices that they would make over crucial aspects of the future relationship, including maintaining high regulatory standards that the UK once inherited from the EU, accepting a limited role for the European Court of Justice in the future if it means keeping the country more secure, or choosing to voluntarily align to EU rules in those areas where it clearly leads to economic benefits for consumers.

These findings suggest that there is an opening for the UK to look for a new kind of post-Brexit relationship with the EU – one that is closer to the EU than the agreements negotiated by the Johnson government but also one that does not seek to reintegrate the UK into the EU single market. This may be described as “cakeism” by some, but it is clear from our analysis that the British public are pragmatic in their choices and are prepared to accept some loss of sovereignty in return for the benefits they receive.

This is particularly significant in the current debate about how far EU-inherited legal protections for businesses and workers should be removed from the UK statute book through new legislation that would remove “retained EU law” in order to realise the opportunities of Brexit. According to our analysis, there is little, if any, evidence that most of the public support the purist idea of sovereignty, coupled with the deregulation-at-all-costs agenda, pursued by the current UK government..

The data also illustrate that there is little political space for the Conservative party – which caters overwhelming to the needs of 2016 Leavers – to make the argument for a reformed relationship with the EU. It will be the task of future government to look for a new balance in relations with the EU.





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