



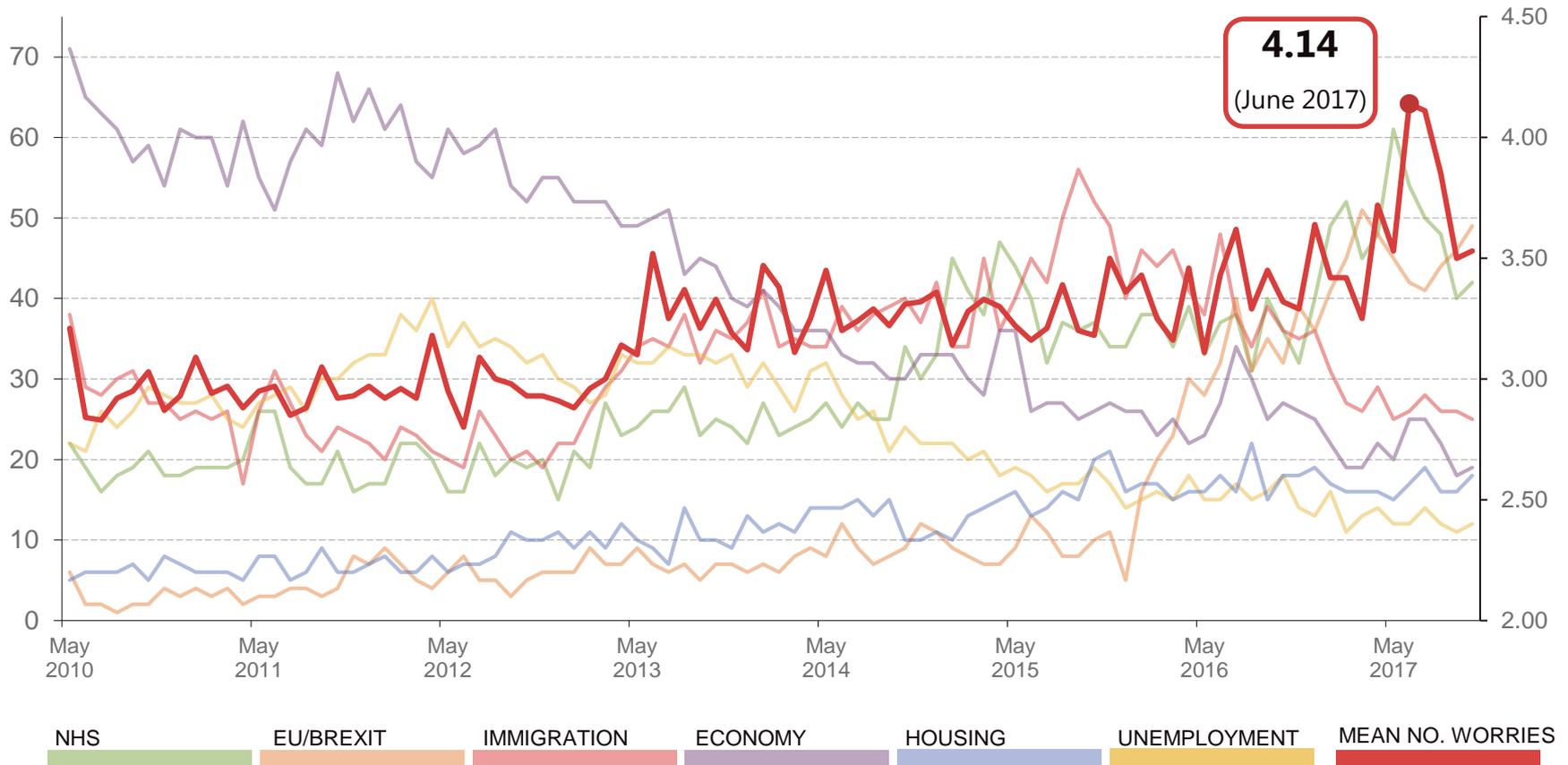
The five tribes of Brexit Britain

IPSOS MORI ISSUES INDEX

Contacts: Gideon.Skinner@ipsos.com
Michael.Clemence@ipsos.com
Anna.Sperati@ipsos.com
020 7347 3000

Since 2010 our concerns have become more diverse and more numerous

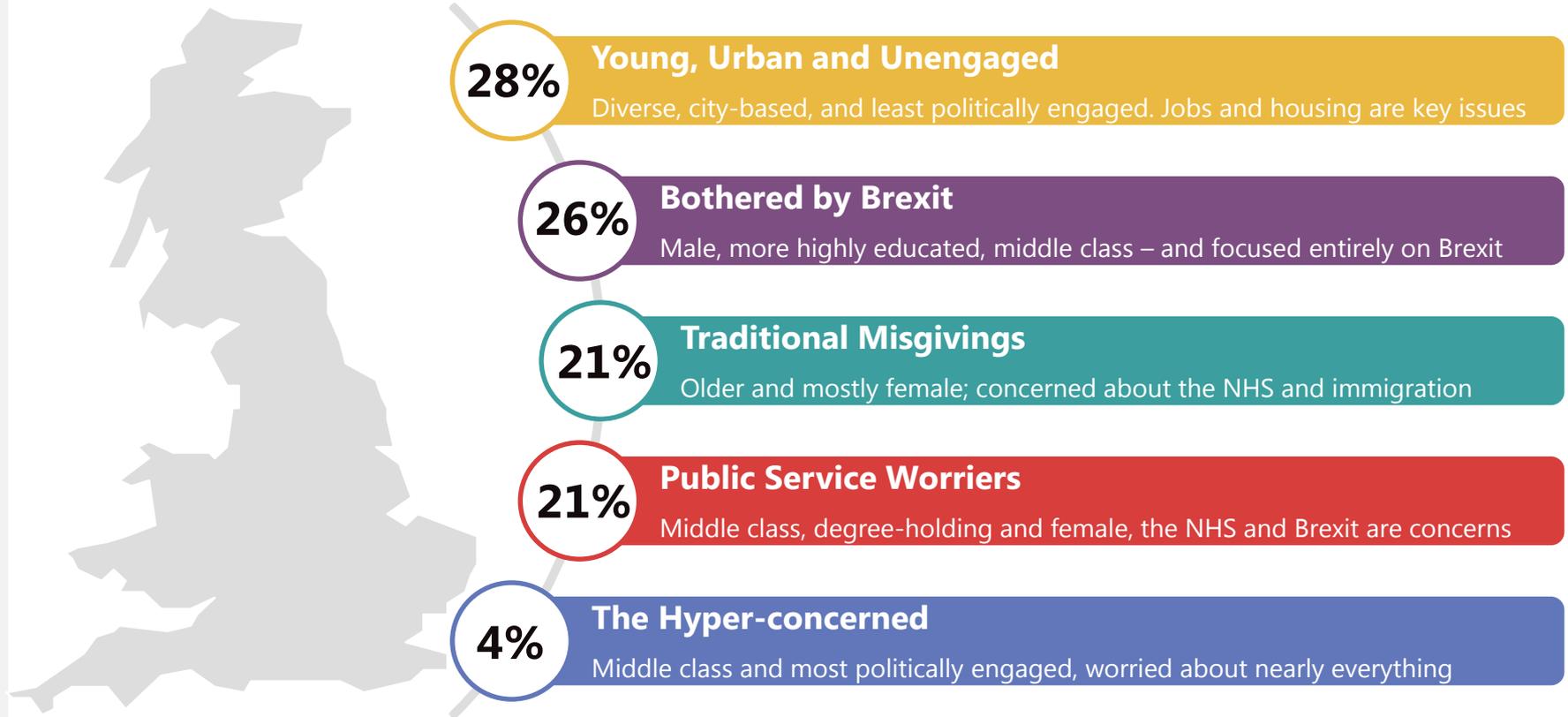
What do you see as the most/other important issues facing Britain today? / Average number of issues



Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home

Source: Ipsos MORI Issues Index

Who are the five tribes?

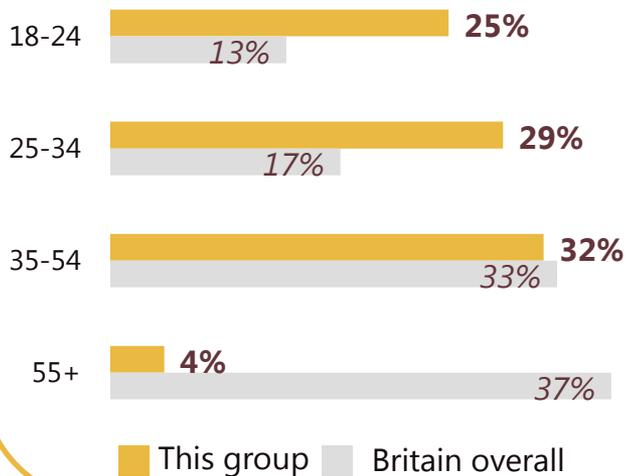


Who are they?

Members of this group are **younger, more urban**-based and **more ethnically diverse** than the wider population.

They are a more Labour-learning group, but also the least politically engaged

Age profile:



Young, Urban and Unengaged

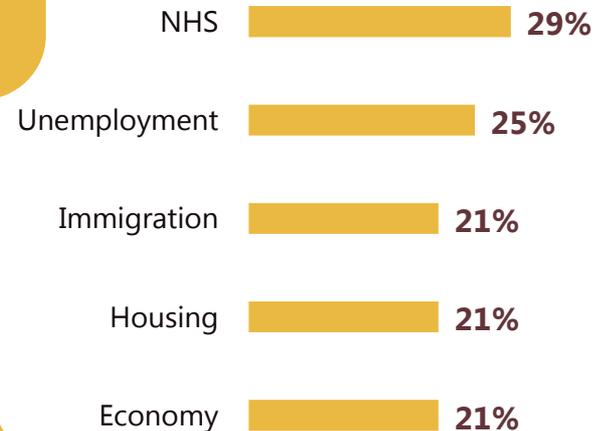
28% of the public

What concerns them?

This group has **diffuse concerns** – no single issue preoccupies them.

The group most likely to worry about **unemployment**, they also rate the NHS, housing and unemployment fairly equally as their biggest issues.

Top five biggest issues:

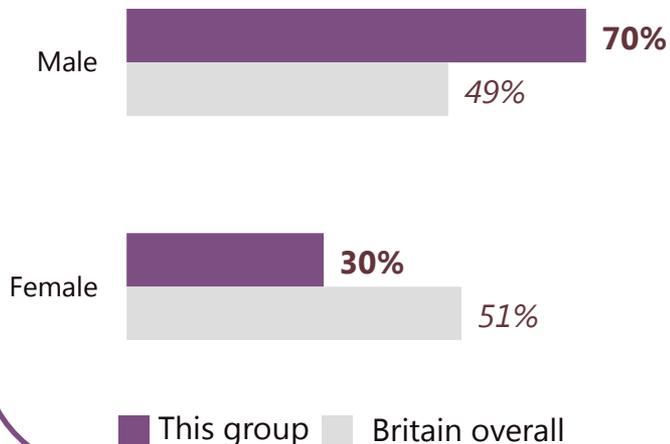


Who are they?

Slightly **older** than average, members of this group are more **middle class**, and much more **male** than the British public overall.

The group leans towards the **Conservative** Party, although many are closer to Labour

Gender profile:



Bothered by Brexit

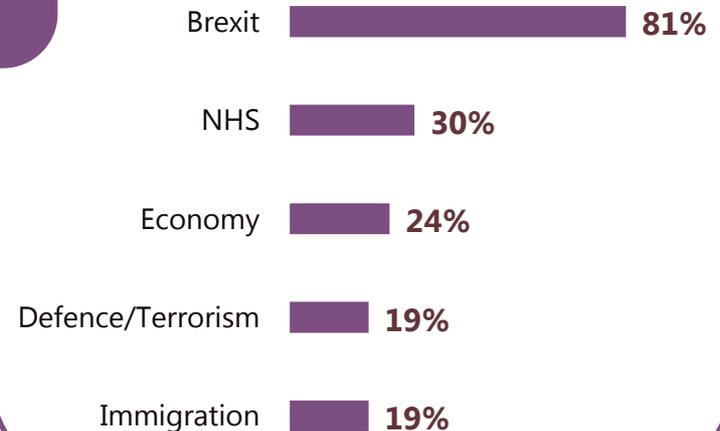
26% of the public

What concerns them?

Group members have a fixation with **Brexit**; they are far more likely to mention it than any other issue.

Groups associated with Leave (men, 55+) and Remain (Scots, ABs) are both over-represented; they may disagree on *why* Brexit is a big issue.

Top five biggest issues:

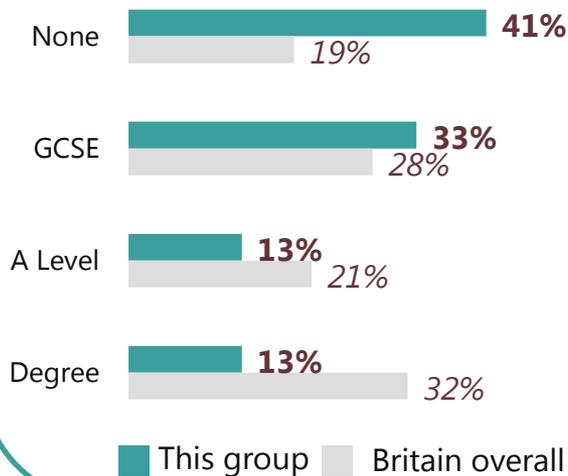


Who are they?

The **oldest** and **least ethnically diverse** grouping, they are more **female** than male and the most likely to have **no formal qualifications**.

Overall they are closer to the Conservatives, but are also the biggest **UKIP** supporters.

Educational qualifications:



Traditional Misgivings

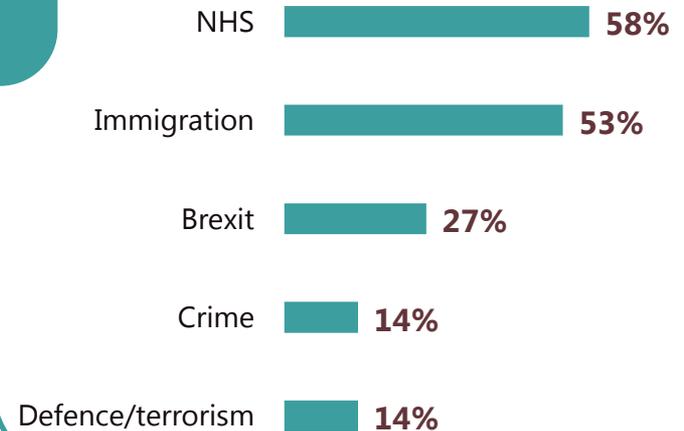
21% of the public

What concerns them?

The NHS is their top issue, but what makes this group stand out is their heightened concern with **immigration**.

Immigration is also most likely to be seen as the single biggest issue facing Britain by this group.

Top five biggest issues:

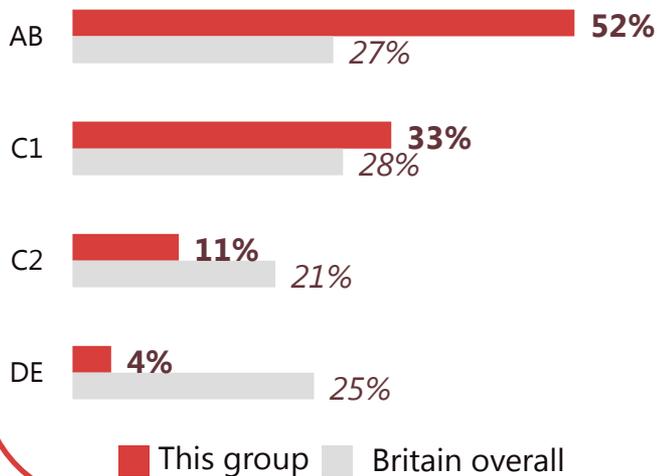


Who are they?

Two thirds **female**, this group are strongly **middle class**, and over half hold a **degree**.

Although predominantly Labour supporting, this group also contains Conservatives and **Liberal Democrats**.

Social Grade



Public Service Worriers

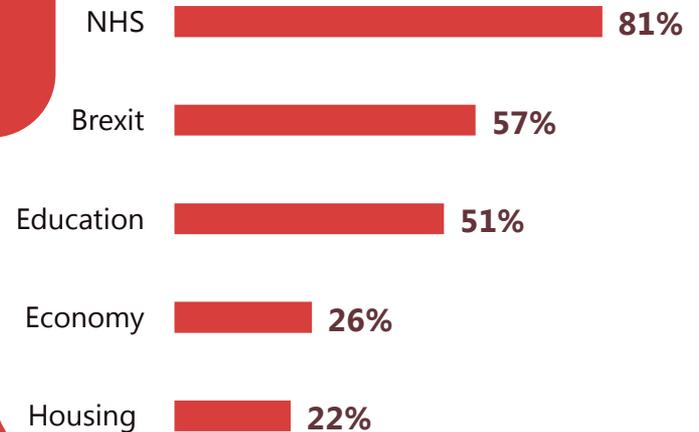
21% of the public

What concerns them?

This group are highly likely to worry about the **NHS**, as well as **education** – in addition to being concerned about Brexit.

Brexit may be their biggest single issue, but they are also more likely than average to say the NHS or education

Top five biggest issues:

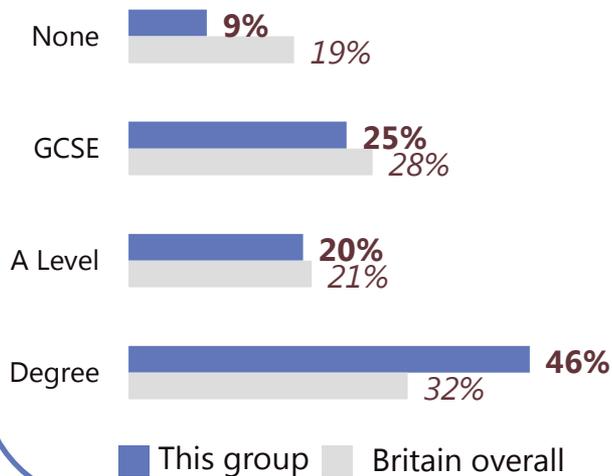


Who are they?

Another **middle class** grouping, a high proportion have a **degree**. This group is also the most **suburban or rural**-based and **middle aged**.

They are also the most **politically engaged**, with the fewest non-voters.

Educational qualifications:



The Hyper-Concerned

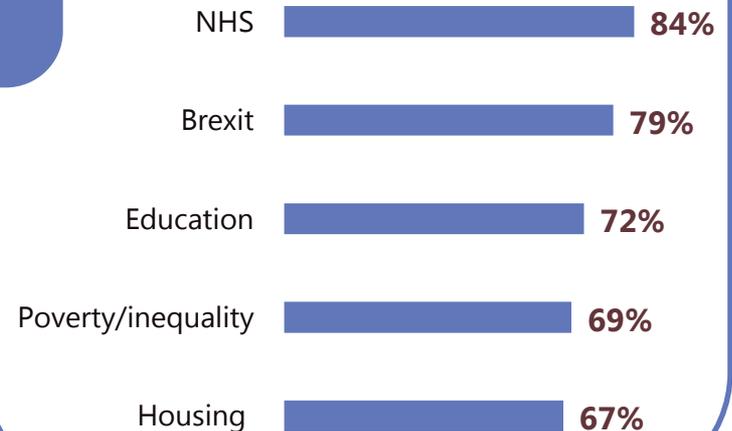
4% of the public

What concerns them?

This small group are highly likely to worry about **most issues**. More than 70% will mention NHS, Brexit and education as issues.

The single biggest issue for this grouping is Brexit.

Top five biggest issues:



Young, urban and unengaged

The largest group – 28 per cent – are identified by their low probability of selecting a wide variety of issues.

No single issue stands out; they are most likely to choose the NHS as an issue, but the probability of this is 0.29. They are the most likely group to be worried about unemployment too.

This is shown in their choice of the biggest single issue facing the country; none get over 10%, although they are more likely than average to pick unemployment or housing.

Top five issues	Probability of selection
1. NHS	29%
2. Unemployment	25%
3. Immigration	23%
4. Housing	21%
5. Economy	21%

10% select the NHS as the single biggest issue (11% say “don’t know”)

Base: Diffuse concerns 2,540

Young, urban and unengaged

This group is slightly more likely to be male, and they are heavily skewed by age; not only are 54% aged 18-34, but 25% are aged 18-24. They are the most ethnically diverse group, and just eight per cent are in social grades AB.

This group is the most urban of the five, and most likely to have children. They identify most strongly with the Labour Party, however a high proportion are non-voters.

Over one third (36%) have GCSE-equivalent qualifications, and one quarter (19%) have a degree.

				<i>Britain overall</i>
Gender	Male	54%	49%	
	Female	46%	51%	
Age	18-34	54%	30%	
	35-54	32%	33%	
	55+	14%	37%	
Social Grade	AB	8%	27%	
	C1	24%	28%	
	C2	27%	21%	
	DE	40%	25%	

Base: 2,540 British adults aged 18+, Jan – September 2017

Bothered by Brexit

For 26 per cent of the British population, leaving the EU is by far the most pressing issue.

Their probability of choosing Brexit as one of the key issues facing Britain is 0.81 – far ahead of the NHS, which is the issue they are second-most likely to choose.

This group are particularly unlikely to select crime, unemployment and inflation/prices as important issues facing the country

Top five issues	Probability of selection
1. Brexit/EU	81%
2. NHS	30%
3. Economy	24%
4. Defence/terrorism	19%
5. Immigration	19%

67% select Brexit as the single biggest issue

Base: Brexit bunch 2,294

Bothered by Brexit

People in this group are much more likely to be male, and are also more likely to be aged 55 and over.

They are predominantly middle class; seven in ten are classified as being from social grades ABC1, and four in ten are from grades A and B.

The same proportion (42%) hold degree-level qualifications, and they are more likely to identify with the Conservative Party than the Labour Party.

Their views on Brexit may be complex; groups associated with “leave” and “remain” voting are *both* over-represented here.

		Britain overall	
Gender	Male	70%	49%
	Female	30%	51%
Age	18-34	25%	30%
	35-54	35%	33%
	55+	41%	37%
Social Grade	AB	38%	27%
	C1	31%	28%
	C2	19%	21%
	DE	12%	25%

Base: 2,294 adults aged 18+, Jan – September 2017

Traditional misgivings

For 21 per cent of the British population, the NHS and immigration compete to be the biggest issue.

The probability that they select each of these issues is very similar; the next-most common issue is Brexit.

The issues they are especially unlikely to select include unemployment, poverty and inequality, and housing.

Top five issues	Probability of selection
1. NHS	58%
2. Immigration	53%
3. Brexit	27%
4. Crime	14%
5. Defence/terrorism	14%

31% select immigration as the single biggest issue

Base: 1,926 adults aged 18+, Jan – September 2017

Traditional misgivings

This group is more female than male. They are an older group; 70% are aged 55+, and 49% are aged 65 and over. Over four in ten are from social grades DE.

They identify most strongly with the Conservative party, and are where most remaining UKIP voters can be found.

41% have no formal qualifications, and another third (33%) have GCSE-equivalent qualifications; just 13% hold a degree.

			<i>Britain overall</i>
Gender	Male	33%	49%
	Female	67%	51%
Age	18-34	7%	30%
	35-54	23%	33%
	55+	70%	37%
Social Grade	AB	9%	27%
	C1	23%	28%
	C2	25%	21%
	DE	43%	25%

Base: 1,926 British adults aged 18+, Jan – September 2017

Public service worriers

21 per cent are especially likely to voice concerns with public services, as well as Brexit.

The probability that this group name the NHS as a concern is very high – 0.81. They are also more likely to name other public services (education and housing), in addition to Brexit, as a concern.

This group are unlikely to say that crime, unemployment, and inflation/prices, are issues facing Britain.

Top five issues	Probability of selection
1. NHS	81%
2. Brexit	57%
3. Education	51%
4. Economy	26%
5. Housing	22%

37% select Brexit as the single biggest issue
NHS (25%) and Education (6%) are also high

Base: 1,862 British adults aged 18+, Jan – September 2017

Public service worriers

This group is predominantly female, and can be found across different age groups. There is a strong social grade skew, with half coming from social grades AB.

This group are slightly more Labour-leaning than average, but they are also the most likely to identify as Lib Dem

54% hold a degree, and this group are also more likely than average to come from southern England excluding London (40%, compared to 32% of the sample overall)

Britain overall			
Gender	Male	34%	49%
	Female	66%	51%
Age	18-34	27%	30%
	35-54	42%	33%
	55+	31%	37%
Social Grade	AB	52%	27%
	C1	33%	28%
	C2	11%	21%
	DE	4%	25%

Base: 1,862 British adults aged 18+, Jan – September 2017

The hyper-concerned

A small pocket of the population (4%) are likely to say they are worried about most issues.

The NHS tops their list, but Brexit and education also score very highly. They are much more likely than average to name poverty and inequality as an issue

There is a greater than 50% chance that members of this group will list 12 of the 17 issues in the model as a concern.

Top five issues	Probability of selection
1. NHS	.84
2. Brexit	.79
3. Education	.72
4. Poverty/inequality	.69
5. Housing	.67

32% select Brexit as the single biggest issue

Base: 346 British adults aged 18+, Jan – September 2017

The hyper-concerned

This group contains slightly more women than men, and is concentrated in middle age (35-54). They are also middle class, with 45% classified as from social grades AB.

Members of this group are the most politically engaged: while they are more likely to be pro-Labour there are also more Conservative party supporters than average. There are few non-voters.

Half hold a degree, and this group is the least likely to be based in an urban location, with half in the south of England outside London.

			<i>Britain overall</i>
Gender	Male	44%	49%
	Female	56%	51%
Age	18-34	25%	30%
	35-54	39%	33%
	55+	36%	37%
Social Grade	AB	45%	27%
	C1	32%	28%
	C2	14%	21%
	DE	9%	25%

Base: 346 British adults aged 18+, Jan – September 2017

Methodology

Latent Class Analysis: a method for segmentation

The Issues Index

The Ipsos MORI Issues Index is a monthly poll that has run since September 1974. Each month, we interview a representative quota sample of around 1,000 British adults aged 18 and over using face-to-face interviewing. Data is then weighted to match the British population profile.

Participants are asked two questions – the first asks what they believe the biggest single issue facing Britain is, and a second asks for other big issues they believe are facing the country. The question is asked unprompted, and interviewers code responses to a list of potential issues.

This analysis uses data from the first nine waves of the issues Index over 2017, covering January to September. Over this time period 8,969 interviews were conducted.

Latent Class Analysis

Participants were classified using Latent Class Analysis (LCA), a statistical technique which identifies clusters of people who share similar values or behaviours. This is a probabilistic model-based approach, taking advantage of the binary nature of Issues Index questions to estimate the probability of group membership for each participant, and then assign them into clusters.

The figures associated with issues for each group are probabilities – for example in the “Bothered by Brexit” grouping there is a 0.81 probability that any given member will mention Brexit. This is interpreted as an “81% chance” of selection.