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Who are the Euro Waverers?

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The Foreign Policy Centre

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Who are the Euro Waverers?

Preface
Message from Trade Unionists for Europe

Trade Unionists for Europe (TUfE) are happy to support this initiative by the Foreign Policy Centre.

The survey results show far more trade union members favour Britain joining the euro than the public at large. While few union members either love or loathe the euro, plenty are open to persuasion. This makes trade unionists a key constituency in any referendum campaign. They will swing to voting yes provided they are reassured on three points:

- First, that Britain joins at a realistic exchange rate, probably some 20% lower than recent rates.

- Second, that EU reform includes a positive social agenda which raises standards of social protection and employment rights across the EU. For instance, nine out of ten GMB members say that introducing information and consultation rights in the UK similar to those elsewhere in the EU is important to them.

- Third, that public services are protected from any artificial eurozone squeeze on government spending.

Trade Unionists for Europe will play its part in convincing all open minded people that Britain's interest lies in joining the euro.

John Edmonds is General Secretary of the GMB and Secretary of TUfE.

Foreword by Mark Leonard

Despite the lead which opponents of the single currency have in the polls, the most striking feature of opinion surveys over the last few years is the high number of people who claim that they are open to persuasion: the euro waverers. Numbering almost half the population (45%), this group is much larger than either the numbers of definite supporters or opponents of the single currency. And yet this group continues to be under-researched and misunderstood. It is against this background that we decided to commission MORI to do a detailed profile of the swing voters.

Based on exclusive opinion polling, MORI's Roger Mortimore and Simon Atkinson build up a detailed picture of this group – with new information on their political complexion, earnings, personal financial circumstances, travelling history and newspaper reading habits. Crucially, they explore how likely the waverers are to turn out on polling day. To secure a victory – whether in 2003 or 2004 the "yes" camp will need to win over the majority of them. The findings of this survey make fascinating reading.

First, they demonstrate clearly that the euro referendum can be won: if all those opposed to the euro but prepared to change their mind are added to those already in favour, they make up 61% of the public. Pointing out that Europe is a complex and low salience issue on which people look to expert opinion, they conclude that the headline figures tell us very little about what will happen in an actual campaign: "the referendum result will not primarily depend on the balance of opinion when the campaign begins, but on the persuasiveness with which the two sides put their case".

Second, they find that the most important variable for the result of a referendum will be the turnout. If all wavering opponents of the euro could be swung in its favour, 61% would support it, but if we consider only those absolutely certain to vote, swinging every waverer in favour would bring the "yes" total to only 55%. If the turnout is as low as 50% the "no" side will win by default, but if the turnout is 70%, it will help the "yes" side since a greater percentage of the stay-at-homes would be eurosceptic. This means that the euro must become a high salience issue. Labour's electoral strategy in the last two elections – based on arguing that the issue is less important than public services – must be reversed.

Third, they show that the "yes" side will need to have a very targeted campaign strategy – with different personalities, media and messages appealing to each group. Assuming that the "yes" campaign manages to secure the people who are currently in favour of the single currency, there will be two key target groups: "civic waverers" who are against the single currency but could be persuaded to vote yes, and "apathetic waverers" who support the single currency but are not sure that they will vote.

There are 2.8 million "civic waverers", who have doubts about the single currency but could be persuaded to vote yes if they thought it was in the country's economic interest. These voters are politically active, they tend to be women who are middle-aged (35-55), middle class (ABC1s) and highly affluent. They tend to have at least two cars, a mortgage, and no children who live at home. They read the Daily Mail or Daily Telegraph and are very gloomy about the economy. Politically, they are satisfied with Blair, but dissatisfied with the government. Interestingly, they hold Iain Duncan Smith in "unusually low regard" with only 15% satisfied with his performance.

The other key group are the 3.6 million "apathetic waverers" – people who are in favour of the single currency but unsure that they will vote in a referendum. Members of this group are the polar opposite of the civic waverers. They are very young (under 35) and politically inactive – many are too young even to have voted before. They tend to be male and single. They are either young professionals or students, and unlike the civic waverers, most have visited the continent of Europe in the last few years. Most do not read a daily paper, and if they do it is likely to be a "red-top" tabloid. Politically they register very high levels of support for Labour, the current government, and Tony Blair himself.

The fourth lesson is that people's general economic and political outlook will be more important than their view of the euro. This poll suggests a strong correlation between economic optimism and support for the euro – with the most optimistic being the keenest on euro membership. There is also evidence that all the groups apart from the firm "no" voters are open to persuasion, and are broadly supportive of Tony Blair personally or the government generally. The key will be to build up – and maintain – levels of trust. One interesting variable is the fall-out from the situation in Iraq which, depending on how it is perceived, could either significantly boost or damage both the Prime Minister's and the government's standing.

The fifth lesson is that the battleground for the campaign will be the broadcast media rather than the newspapers. Nineteen per cent of the adult population (8 million people) read no newspaper regularly and say that their mind might be changed on the euro. The non-readers are only a little less likely than average to say that they would be absolutely certain to vote in a referendum – and many more of them are waverers. The challenge will be to find an effective avenue of communication to swing their opinions – through agenda-setting in broadcast news, poster advertising or leaflet drops.

Finally, there is evidence that concerted campaigning can make a difference. The poll found that trade unionists are substantially more favourable to joining the euro than the average voter – 48% favour joining compare to 46% who are against. This figure is not sufficiently explained by the demographic, political and educational profile of trade union members and might be related to the fact that many unions have campaigned on the single currency in a concerted way over the last few years.

The backdrop to this poll is a hardening media and political consensus that, in June 2003, the euro referendum will be shunted off into the distant future as it was after the 1997 and 2001 elections. Some pro-Europeans, concerned by the stubbornness of the headline figures of public support for the euro, are arguing that there is no need to rush, while the sceptics are sighing with relief that their arguments will not be put to the test of public opinion.

There seems to be a consensus that the status quo is not too bad. On many variables we seem to be outperforming the Germans and other eurozone countries: our political influence has not disappeared; no major investors have upped sticks to move to the eurozone. In spite of the overblown rhetoric about exclusion from the currency, the heavens have yet to fall in.

What many seem to forget is that the status quo is based on a firm signal by the Prime Minister that he will join the single currency when the economic conditions are right. Leaders of other European countries, and many companies, have taken this assurance at face value, and have witnessed the growing convergence between the British and eurozone economies as a sign that Britain will join. This is not to say that there have been no costs from exclusion: the British share of foreign investment into Europe fell from an average of 28.9% in the 20 years prior to the launch of the euro to 16.7% last year. Furthermore UNCTAD estimates it will dry up to as little as 5.1% this year. The political costs have been real as well – a revival of the Franco-German axis, and a failure to win support on reforming the Common Agricultural Policy.

But the status quo will come to a clear end by 6 June 2003 when the Government must decide. Research by the NIESR, Pricewaterhouse-Coopers, the OECD and South Bank University suggests that the five tests have already been met, so businesses and politicians across Europe will interpret a decision not to join as either weakness or evidence of a lack of commitment to the European Union. More warm words will not disguise the stark fact that Britain could be left alone outside the single currency if, as the polls suggest, Denmark and Sweden vote to join. More damagingly we could even find ourselves leapfrogged by the ten new member states – Cyprus and Malta already meet the Maastricht convergence criteria, while Slovenia, the Czech Republic and Hungary are close. With the European Union writing a new constitution, setting its role on the world stage and welcoming ten new members, there could not be a worse time for Britain to be marginalised and bereft of support on the crucial issues. And with the international economy in a fragile state, a dramatic swing of investment away from Britain and into the eurozone could be very painful.

These figures suggest that a referendum can be won with a concerted effort and an effective strategy – but only if the government starts to build up momentum. The option to wait-and-see will always be attractive in the short term as the political risks of failing to win a referendum are imminent, while the risks of exclusion will only materialise in the future. But the danger is not merely that the present Government seem like lesser players in the history books – it is that Britain will be a lesser country that pays a heavy political and economic price for its isolation.

Mark Leonard is Director of The Foreign Policy Centre and a member of the Executive Council of Britain in Europe.

Introduction

At some time in the comparatively near future – perhaps within the next year – Tony Blair hopes that he will be able to call a referendum at which the British electorate will authorise him to take the UK into the single European currency. The success or failure of this project depends entirely upon the state of British public opinion, and the ability of the government and their opponents to influence it and to get the vote out.

There have been plenty of opinion polls measuring British attitudes to the euro. Virtually all find that there is at present a substantial majority against joining, and that this majority has not significantly diminished over the year since euro notes and coins went into circulation elsewhere in Europe. On the other hand some other indicators are much more encouraging for the pro-euro camp – for example the fact that a majority of the public believe, regardless of their own preferences, that Britain will have adopted the euro within a few years' time.

But to gain insight into the likely course of events and the hurdles that the government must overcome demands deeper knowledge than a simple tally of the current numbers for and against. The biggest group of voters is still the group that claims to be open to persuasion in a campaign. So who are the waverers or swing voters that the "yes" camp would need to mobilise in order to achieve success in a referendum? What are their essential characteristics and what might this tell us about how a successful campaign might be structured? What can we learn at this stage about turnout – including those groups who may be more or less likely to vote? And what do we find when we seek to explore the impact of travelling to the eurozone on attitudes? What is their attitude to the different parties and their leaders? What are their personal economic circumstances? What newspapers do they read?

These are issues which have rarely, if ever, been included in published surveys on the euro. They help us to shape our thinking on the potential role that political leaders have in shaping how the debate and subsequent campaign will develop. To this end, The Foreign Policy Centre commissioned a short survey from MORI, conducted in November 2002. The poll used, as its measure of attitudes to the euro, a question somewhat more subtle than the conventional yes-no dichotomy. Since 1996, MORI has been asking an occasional question on the euro which gauges not simply the direction of attitudes but also the strength of commitment:

Q. Which of the following best describes your own view of British participation in the single currency?

A: "I strongly support British participation"

B: "I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy"

C: "I am generally opposed to British participation, but could be persuaded to vote in favour of it if I thought it would be good for the British economy"

D: "I strongly oppose British participation"

By measuring not simply the direction in which each respondent leans but the intensity of their opinions and their openness to persuasion, this question gives a much clearer picture of the scope for swinging opinions in favour of the euro. In particular, it enables us to identify and examine further the key group which we have called the "waverers" – those who say that they might change their minds about the euro on the basis of what is best for the British economy. This can then be cross-referenced with questions about politics, turnout, travel, personal economic circumstances, media consumption, and demographic factors.

It is important to note that the question specifically focuses on those who might change their minds on economic grounds, rather than for any other reason. Since it seems likely that the focus of the government's arguments in favour of joining the single currency will be on the economic benefits for Britain, and since those who are at present opposed to joining the euro - but might be swung by economic arguments - hold the balance of power between the pro- and anti- camps at every likely level of turnout, this seems clearly to be the key group.

This pamphlet attempts two tasks in the light of the findings of the MORI/FPC survey. In the first section, it sets the scene for the referendum, examining the present balance of opinions and the political context in which a campaign to change those opinions will take place. In the second section, it builds up a very detailed picture of the British electorate, segmenting the public on the basis of their opinions and examining each group in turn, but paying particular attention to the key groups of waverers whose votes are most likely to swing the result and to whom wise campaigners will pay most attention.

SECTION ONE:
THE CLIMATE FOR THE REFERENDUM

1 The prevailing climate: current attitudes towards the euro

Q. Which of the following best describes your own view of British participation in the single currency?

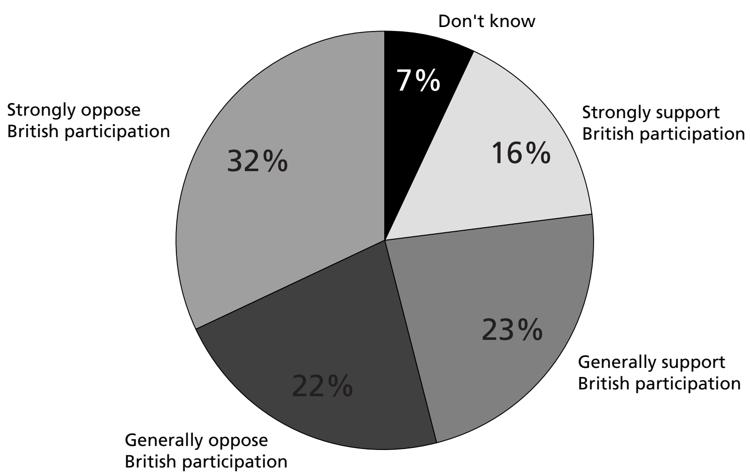
A: "I strongly support British participation"

B: "I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy"

C: "I am generally opposed to British participation, but could be persuaded to vote in favour of it if I thought it would be good for the British economy"

D: "I strongly oppose British participation"

Figure 1
British Participation in the Euro



Base: 1,029 British adults 15+, 14-19 November 2002.
Source: MORI/FPC

The current balance of opinion is against the euro – only two in five say they support British participation in the single currency while more than half are opposed. But we can cut the cake another way: approaching half the public, 45%, are "waverers" – they admit that they might change their minds on the issue if they thought the interests of the British economy warranted it. If all those opposed to the euro but prepared to change their mind are added to all those already in favour, they make up 61% of the public, so in theory the referendum is certainly winnable.

Q. Which of the following best describes your own view of British participation in the single currency?

	All GB %	North/ Scotland %	Midlands Wales %	South (except London) %	London %
I strongly support British participation	16	17	15	9	28
I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy	23	24	22	24	17
I am generally opposed to British participation, but could be persuaded in favour of it if I thought it would be good for the British economy	22	21	22	26	17
I strongly oppose British participation	32	31	32	36	25
Don't know	7	6	8	4	13
Support	39	41	37	33	45
Oppose	54	52	54	62	42
"Waverers"	45	45	44	50	34

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

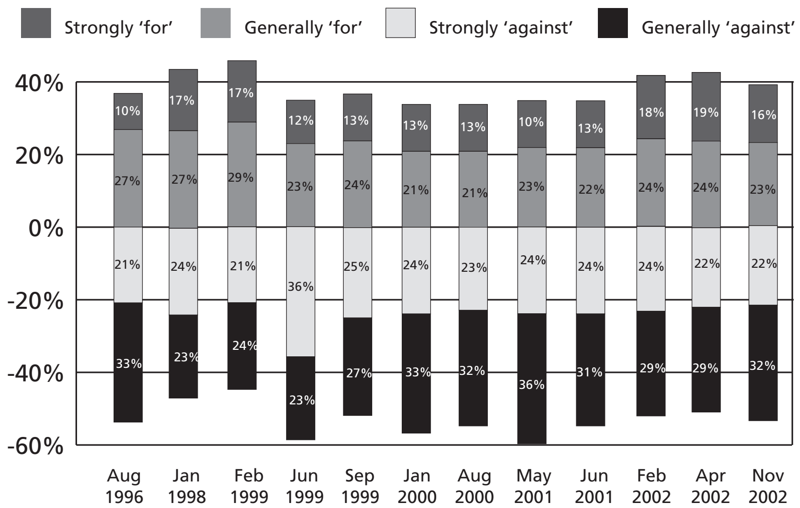
There are some significant regional differences in attitudes. In London there is a narrow majority in favour of joining the euro, and only a third of the public say that they might change their minds, split evenly between those generally in favour of the euro and those generally against. In the South outside London, by contrast, the eurosceptic camp is very strong, with the current balance being 62% to 33% against, and half the public wavering – again, evenly split at the moment. Whereas in London 28% strongly support British participation in the single currency, in the surrounding areas the figure falls to 9%. The North and Midlands, however, are both close to the national average figures; here the majority opposes the euro, but close to half might change their minds.

While London is more favourable to the euro than the rest of the country, this simply reflects the capital's distinctive population profile: it is no more pro-euro than its demographic characteristics, newspaper readership and party political opinions might predict. But it is noticeable that the number of "don't knows" is considerably higher in London than elsewhere, which cannot be easily explained in the same way. This may well be a reflection of London's divided opinions on the issue – people who would otherwise be opposed to the euro might find themselves feeling less sure of their attitudes when they find the local climate of opinion doesn't support them.

Age also appears to be an important factor, with 35-44 year olds narrowly in favour of joining the euro while older and younger age groups are opposed.

The new findings are little changed from those in two previous surveys in 2002. As the graph shows, what little shift there has been in the figures has been against the euro, though this is probably not significant. Over the longer term, there has been some fluctuation; support peaked in February 1999, but fell away again, with opposition at its highest in June 1999 (at the time of the European Parliament elections) and May 2001, during the general election campaign. These peaks of opposition emphasise both the potency of public campaigning, with the Conservative campaign in each case being based strongly round opposition to the euro, and the dangers of complacency for the pro-euro side – their opponents have already twice demonstrated the ability to swing opinions from an already dominant position to an even stronger one; the pro-euro camp has yet to do so.

Figure 2
Single European Currency?



Base: c. 1,000 – c. 2,000 British public.
Source: MORI

What has remained constant throughout is that 45% or more of the public say that they might change their minds, were the economic case to justify it. The reason that people have not made up their minds is that Europe is an issue at present of low salience, of immediate concern only to a small section of the public. Their particular concern is the state of Britain's public services, together at the moment with considerable concern at the developing international situation. (The most frequently named "important issues facing the country" are the NHS, cited by 42%, defence/foreign affairs, 40%, crime/law & order, 30% and education, 29%.)

Q. What would you say is the most important issue facing Britain today?

Q. What do you see as other important issues facing Britain today?
(Unprompted answers. Issues below 8% "most" plus "other" omitted)

	Single most important %	Most plus other important %
National Health Service/Hospitals	12	42
Defence/foreign affairs/international terrorism	23	40
Crime/law & order/violence/vandalism	12	30
Education/schools	5	29
Race relations/immigration/immigrants	8	18
Pensions/social security	2	12
Trade unions/strikes	4	11
Nuclear weapons/nuclear war/disarmament	5	10
Economy/economic situation	4	10
Unemployment/factory closure/lack of industry	3	9
Common Market/EU/Europe/Single European Currency	3	8
Transport/public transport	1	8

Source: MORI/FT
Base: 1,003 British adults 18+, 14-19 November 2002

Consequently, the referendum result will not depend primarily on the balance of opinion when the campaign begins, but on the persuasiveness with which the two sides put their case.

2 Who will turn out to vote?

It is clear that turnout will be a crucial factor in the euro referendum, both in terms of affecting its outcome if one side is differentially more likely to vote, and in terms of the credibility of the result and the authority with which it gives or denies the government permission to proceed.

The 1999 European Parliamentary elections in Britain provide us with a useful reference point. The Conservatives won a convincing victory in terms of votes cast, beating Labour by almost eight percentage points – the only victory the Tories have achieved in any national election since the 1992 general election. But the poll was overshadowed by the low turnout – much lower even than at previous European elections, with just 23% of the electorate turning out to vote. This rather hollow victory did not, of course, presage a Conservative general election revival. But it came from a campaign where the Tories emphasised their credentials as the most eurosceptic of the major parties. Furthermore, in addition to the Conservatives' 36% of the vote, the United Kingdom Independence Party achieved 7%. Both parties, it seems certain, were able to win a share of the vote well above their natural level because they were better at turning out their supporters to vote in the European elections than their opponents were.

Of course, the 1999 election result was dependent on its specific circumstances, on the political climate at the time and on the course of the very low-key campaign. It does not imply that turnout in a vote on Europe-related matters must necessarily be low, or that the euro-sceptics would necessarily always be the side to benefit from low turnout. But it did highlight the profound impact that differential turnout can have on the result. Put simply, Conservative supporters were (relatively speaking) more motivated to get out and express their views than their Labour counterparts. The outcome of the euro referendum will critically depend on how effective the pro- and anticamps are in mobilising both their core support and the all-important waverers in between.

First, though, can we start to establish a marker as to what overall turnout is likely to be? Our poll finds half the public, 50%, saying they would be absolutely certain to vote in an immediate referendum on the euro, rating their likelihood of voting as 10 on a 1-to-10 scale. Men are more likely to be certain of voting than women, older citizens more certain than their younger counterparts, and middle class respondents much more so than the working class. Seven in ten regular readers of broadsheet newspapers are certain they will vote, as are half of tabloid readers and 47% of those who read no daily paper regularly. Trade union members are a little more likely than average to be sure of voting, as are graduates.

This pattern is similar to that found when we ask about likelihood of voting in the next general election, except for the preponderance of men over women. The figure of 50% absolutely certain to vote is closely comparable to the number who say they would be absolutely certain to vote in a general election (49% in this survey), and suggests that the turnout in a referendum might be close to a general election turnout – which would at least secure the authority of the referendum decision (even should that turnout level be as low as the last general election).

This leads us on to the question of the potential impact of differential turnout. The problem for the government – assuming it decides to campaign for a "yes" vote – is that those who feel absolutely certain they would vote in a referendum are substantially more eurosceptic than the public as a whole. The adult population as a whole splits 54% to 39% against the euro, but among those absolutely certain to vote, the "antis" lead 59% to 38%. When we take the waverers into account, the differential is as big: if all wavering opponents of the euro could be swung in its favour, 61% of the public would support it, but if we consider only those who are absolutely certain to vote, even swinging every waverer in favour would only bring the "pro" total to 55%, very little margin for error.

It seems, therefore, that ensuring a high turnout in the referendum may be as critical to the government's success as winning the economic arguments. But this, of course, brings associated political risks: Labour's electoral strategy at the last two general elections has been based partly on ridiculing Conservative obsession with opposing European integration, and discouraging any disunity in its own ranks by playing down the magnitude of the issue. Raising the salience of the euro issue might be dangerous, yet must be an essential part of the strategy to win a referendum.

3 The economic context

The arguments currently put forward by both the pro- and anti- camps have economic issues at the forefront. One challenge will be to make these directly relevant to the public, whether in terms of their own personal well-being or in terms of very big picture messages about the potential impact on the British economy. Some 42% of British adults are currently buying their home on a mortgage, and therefore have a real stake in the level of interest rates. A further 29% own their properties outright, whose value will be directly linked to the broad fortunes of the economy.

At the turn of the year, the MORI economic optimism index (EOI, sometimes called "consumer confidence") stands at the very low level of –40. This raises questions as to how voters might react to the economic arguments which will be at the centre of the campaign for a "yes" vote. Assessments of the current performance of the British economy and how this compares with eurozone countries will be one central issue.

The government's assurance that the "five tests" have been met (without which, of course, the referendum will not be called in the first place) needs to have some chance of influencing public opinion favourably. The current indicator from the business community – as shown in the recent MORI survey of British Chamber of Commerce members – highlights real caution about how quickly Britain should move, even if the Chancellor announces that the tests have been met.

It should be remembered, of course, that few of the public consider themselves economic experts or have any detailed knowledge of the five tests. (Indeed, in a MORI survey for The News of the World in June 2000, only 8% of the public were able to name any of the five tests and not a single one of the 1,002 respondents could name all five.) Those of the public who admit they could be swayed by the economic arguments will, for the most part, be relying on the advice of the experts they most trust rather than judging the detail of the arguments for themselves.

4 A question of leadership? The political scene

Many people have argued that it is the politicians who will be the key to influencing voters who are unsure of the economics of the euro. Bob Worcester argued this powerfully in The Foreign Policy Centre's earlier pamphlet, 'How to Win the Euro Referendum: Lessons from 1975':

On an issue where many are happy to admit that their knowledge is deficient, they will tend to rely on the judgement of those experts that they trust rather than their own…. Broadcasting regulations will ensure that the pro- and anti- campaigns receive equal air-time to put their case, so if voters are shown one businessman putting the economic case in favour of the euro, they will see another putting the opposite case. To the vast majority of viewers such experts will be little more than a series of anonymous talking heads – they will know little about them, will have no particular instinct that one is more reliable or trustworthy than another if they put their arguments equally well….

But the case with politicians is different: there are already political leaders that the public know and trust; people watching the coverage of the campaign will have some basis by which they can weigh the pronouncements of one against another; an argument that they would otherwise consider themselves unable to judge as good or bad will be enhanced or tainted by the reputation of the familiar face that intones it.

The big hope of the "yes" campaign has been that it will be able to trade off the relative credibility of Tony Blair, Gordon Brown, Charles Kennedy, Ken Clarke and the Labour Party, and contrast them to the dismal ratings of Iain Duncan Smith and his Conservative Party. So, the government's chances of winning the referendum on the euro, involving as it does a swing in the balance of public opinion, will clearly be affected by the government's general standing, and the extent that it will be able to exercise political leadership as it puts forward its case.

Despite having been re-elected with a landslide majority barely 18 months ago, Labour's hold of public opinion is by no means secure. It is true that Labour has a comfortable lead in voting intentions – by 42% to 30% over the Conservatives among those most certain to vote in the November MORI/Financial Times Political Monitor survey. But satisfaction with the way the government is doing its job and with Mr Blair's own performance as Prime Minister have fallen sharply since the general election: only 32% now declare themselves satisfied with the government, and 40% are satisfied with Mr Blair while 51% are dissatisfied.

Q. Are you satisfied or dissatisfied with the way…
…the Government is running the country?
…Mr Blair is doing his job as Prime Minister?
…Mr Duncan Smith is doing his job as leader of the Conservative Party?
…Mr Kennedy is doing his job as leader of the Liberal Democrats?

	Satisfied	Dissatisfied	Don't know	Net
	%	%	%	%
Government	32	56	11	-24
Blair	40	51	8	-11
Duncan Smith	22	49	30	-27
Kennedy	47	19	34	+28

Source: MORI/FT
Base: 1,003 British adults 18+, 14-19 November 2002

As the monthly trend shows, Mr Blair's low satisfaction rating has been relatively steady through most of 2002, though it was very much higher in September 2001 in the immediate aftermath of the 11 September attacks in the USA, when his handling of Britain's reaction to the crisis plainly impressed many of the public. If Tony Blair is felt to be doing a good job in handling the current crisis over Iraq over the coming months, we may again see his figures moving in a positive direction. But this is by no means guaranteed.

Q . Are you satisfied or dissatisfied with the way Mr Blair is doing his job as Prime Minister?

	Jun 2001	Sep	Jan 2002	Feb	Mar	Apr	May	Jun	Aug	Sep	Oct	Nov
	%	%	%	%	%	%	%	%	%	%	%	%
Satisfied	55	67	51	46	42	46	39	46	42	42	41	40
Dissatisfied	37	26	39	46	50	46	50	47	50	49	49	51
Net	+18	+41	+12	0	-8	0	-11	-1	-8	-7	-8	-11

Source: MORI
Base: c. 1,000 British adults 18+ each month

How likely would the public be to take the government's advice on the euro, were it to start making a strong case in favour? Our regular tracking work for Schroder Salomon Smith Barney has consistently indicated that the impact of the government strongly urging that Britain should join would have a significant but small effect on public attitudes towards the euro. We can also look for clues in the public's confidence (or otherwise) that Labour is going to be able to deliver on its other stated objectives, for example in the area of public services.

At the moment, most people are sceptical of Labour's ability to achieve improvements in key services. In December 2002, only 35% agreed that "in the long term, this government's policies will improve the state of Britain's public services", and fewer than two in five expect any of the NHS (33%), the quality of education (39%), public transport (26%) or the way their area is policed (27%) to get better over the next few years.

They are only a little less gloomy about the government's economic competence. While 38% think that, "in the long term, this government's policies will improve the state of Britain's economy", 44% disagree. This net score of –6 is the worst recorded by MORI under this government, and contrasts with positive scores almost throughout its first term. Although the figures are still much better than they were for most of the last Conservative government's eighteen years in office, they do not suggest a government whose economic assessment the public will necessarily take as gospel.

But people will not look at the Government in a vacuum – we also need to think about the potential role of the Conservatives. The anti-euro slant of their election campaign in 2001 did little to capture the electors' imagination. Domestically, we currently see low credibility for the Conservatives as an alternative government (epitomised by the 22% satisfaction score of Iain Duncan Smith, who even has a negative net rating among Tories). This is the background to the discussions in the "no" camp as to how prominent or otherwise the role of leading Tory figures should be in a referendum.

So though the Government is not as "shiny" as it was in the first term, its credibility consistently outstrips its opponents. This means that any other political events that either strengthen or shake trust in the government in the coming months may have a profound effect on the chances of winning a euro referendum. As noted above, British involvement in a war in Iraq (on which the public is evenly split according to the ICM/Guardian survey on 21-22 November) is one obvious possibility which might cause considerable change in public attitudes to government ministers, for better or worse. But other less predictable events – a sleaze scandal or controversy over government "spin doctors" – could also be very damaging were they to occur at the wrong moment.

The re-establishment of trust therefore becomes a prime concern in the referendum; failing that, much may depend on the advice that is given – or seems to be given – by those the public do trust, of whom the political commentators on the BBC and ITV television news and current affairs programmes may be particularly influential. (During the 2001 general election, 49% of the public said that television was the single source they most trusted "to give accurate and impartial information and news about politics and current issues"; 12% most trusted the radio, and 12% the daily newspapers. In October-November 2001, the European Commission's Eurobarometer survey found that 71% of Britons said they "tend to trust" television, while only 16% "tend to trust" political parties and 75% "tend not to trust" them.)

5 What happens when people visit the eurozone?

One fond hope of supporters of the euro, much touted towards the end of 2001, was that the successful launch of euro notes and coins in continental Europe, and the experience of the new currency in use by British holidaymakers, would inevitably produce a huge swing in favour of the euro. A year on, although there is a majority for joining the euro amongst those who have used it, that swing in the polls shows no signs of materialising.

Q. Which, if any, European countries have you visited this year?

	%
France	18
Spain	17
Greece	6
Germany	5
Belgium	4
Ireland	4
Italy	4
The Netherlands	4
Portugal	2
Austria	1
Denmark	1
Finland	1
Sweden	1
Luxembourg	*
Other	6
None	56
Don’t know	*

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

This is not because there has been any lack of British visits to the eurozone; indeed, two in five of the public (41%) say they have visited at least one other EU country this year. One in six have visited France and a similar number have visited Spain. It is clear, too, that those who have visited the continent have different and more sympathetic attitudes to the euro than those who have not: they split 49% in favour of joining the euro to 48% against, compared to the 58% against and only 32% among the stay-at-homes (or those whose only travel was outside Europe). One in five, 21%, of those who have visited Europe in the last year say they are strongly in favour of joining the euro, compared to 13% among those who have not visited the eurozone.

Q. Which of the following best describes your own view of British participation in the single currency?

	All %	Visited no other European country in last year (56% of public) %	Visited one other European country in last year (27% of public) %	Visited two or more other European countries in last year (17% of public) %
I strongly support British participation	16	12	19	25
I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy	23	19	28	27
I am generally opposed to British participation, but could be persuaded in favour of it if I thought it would be good for the British economy	22	24	17	25
I strongly oppose British participation	32	35	32	21
Don't know	7	10	4	2
Support	39	31	47	52
Oppose	54	59	49	46
"Waverers"	45	43	45	52

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

One reason why seeing the euro in circulation has not greatly shifted British opinion in its favour may be that, in visiting only one European country at a time, British holidaymakers fail to experience its most obvious benefit, i.e. the end of the need to convert currencies at frontiers and the capacity to take advantage of similarly denominated (and therefore comparable) prices in different eurozone countries. The survey offers some support for this reasoning. Three in five of those Britons who had visited another European country in the last year had visited only one. Among this group, 47% are in favour of the euro and 19% strongly in favour. On the other hand, among those who had visited two or more, support for the euro was higher, namely 52% in favour of Britain joining, of which 25% are strongly in favour; these figures rise to 63% and 32% for the small group who had visited three or more.

The likeliest explanation for this trend seems to be that those who visited Europe were more favourable to the euro to begin with than the rest of the British population. However, one piece of evidence does suggest that using the euro on the continent may, indeed, be able to affect the attitudes of British travellers. When the opinions of those who have visited Europe are broken down by the countries that they have visited, it emerges that, while British visitors to every other major country are in favour of the euro or at worst evenly split, those who visited Germany are against, by 57% to 43%. While the sub-sample size of visitors to Germany is small (only 44 respondents) and should not be relied upon too heavily, it is striking how closely this pattern matches the opinions of those countries' own populations – Germany is the only eurozone country where the most recent Eurobarometer survey finds a majority declaring themselves unhappy with the euro's adoption. It may well be that the opinions of British travellers are influenced by the opinions of their hosts.

6 The role of the press

Press coverage is likely to be an important factor in any referendum campaign, so it is instructive to note how sharply opinions currently differ according to newspaper readership. Overall, regular readers of broadsheet dailies are evenly split on the euro, while tabloid readers are much more hostile, as are those who read no daily title regularly. However, there is little difference between the broadsheets and the tabloids on the number of waverers – in both cases just over two in five, and split evenly between wavering supporters and wavering opponents. Among broadsheet readers, 27% strongly favour the euro and 24% strongly oppose it, fairly even with a slight balance in favour. By contrast, for the tabloids, 35% of regular readers are strongly opposed to the euro and only 17% strongly in favour, a two-to-one ratio against. In absolute numbers, the overall effect of this imbalance is magnified by the much larger collective readership of the tabloids.

As might be expected, since those who choose not to read a newspaper regularly are most likely to be those uninterested in current affairs, non-readers are more likely to be waverers and more likely to be don't knows than either tabloid or broadsheet readers. 48%, or almost half, of those not regularly reading a daily title said that, although they had an opinion on the euro, they might change their mind, and a further 9% had no opinion on the issue. In this group also, the waverers are evenly split between those currently favouring the euro and those opposing it. Looking at those expressing a strong opinion, the balance is even more strongly anti-euro than among tabloid readers, with 30% strongly opposed and only 12% strongly in favour of British participation.

With so many of the public among the non-regular-reading group, and with a higher proportion of them retaining an open mind than is the case for those reading a newspaper regularly, this will be a crucial group to the outcome of any referendum. 19% of the public, or one in five British adults, say that their mind might be changed on the euro and that they read no newspaper regularly. Most of these, of course, will at least watch television news programmes regularly, and a good many may frequently see a newspaper while sticking to no one title, but none of these are – even in theory – in thrall to the opinions of a particular editor or proprietor. The challenge will be to find an effective avenue of communication to swing their opinions – be it through agenda-setting in the broadcast news, poster advertising or leaflet drops. Perhaps surprisingly, the non-readers are only a little less likely than average to say that they would be absolutely certain to vote in a referendum, 47% against 50% of the adult population as a whole. By contrast, only 43% of readers of The Sun and just 29% of Daily Star readers are absolutely certain they would vote.

Q. Which of the following best describes your own view of British participation in the single currency?

	All %	Broadsheet readers (n= 144) %	Tabloid readers (n= 481) %	Read no daily paper regularly (n= 399) %
I strongly support British participation	16	27	17	12
I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy	23	22	21	24
I am generally opposed to British participation, but could be persuaded in favour of it if I thought it would be good for the British economy	22	23	21	24
I strongly oppose British participation	32	24	35	30
Don't know	7	4	7	9
Support	39	49	38	36
Oppose	54	47	56	54
"Waverers"	45	45	42	48

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

Q. Which of the following best describes your own view of British participation in the single currency?

	All %	Sun (n= 183) %	Mirror (n= 121) %	Daily Mail (n= 161) %
I strongly support British participation	16	13	27	14
I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy	23	16	20	21
I am generally opposed to British participation, but could be persuaded in favour of it if I thoughtit would be good for the British economy	22	22	18	24
I strongly oppose British participation	32	39	28	38
Don't know	7	10	8	4
Support	39	29	47	35
Oppose	54	61	46	62
"Waverers"	45	38	38	45

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

Of course, to lump all readers together as "broadsheet" or "tabloid" oversimplifies the issue, as the readerships of different newspapers have quite distinct attitudes. Unfortunately, within the compass of a sample of 1,000 it is not possible to explore all the subtleties – the numbers of readers of most titles, in particular the broadsheets, are too small to draw reliable conclusions. Yet even with the wide margins of error dictated by such small sample sizes, some distinctions are so clear as to be statistically significant. While tabloid readers overall are opposed to the euro, this is most strongly true of readers of the Daily Mail and the Sun; Mirror readers split evenly, as do Express readers. Similarly, among broadsheet readers, although the sample is so small that the figures can be no more than indicative, Guardian, Times and Independent readers all split solidly in favour of joining while Telegraph readers are more than two-to-one against.

It is certainly worth noting that waverers are rarest among Sun and Mirror readers, just 38% of each giving an opinion but saying they might change their minds. This contrasts with 61% of Daily Star readers wavering, though with only 28 in the sample it would be dangerous to place much reliance on that figure. More pertinently, there are significantly higher proportions of waverers among readers of the middle-market press, 45% of Daily Mail readers and 54% of Daily Express readers, which compares with the 45% of waverers among broadsheet readers. Taking the differing readerships into account, we find that wavering Daily Mail readers make up 7% of the adult population – or just over three million potential voters; there are a similar number of wavering Sun readers, and slightly fewer (around 2.9 million) wavering readers of all the broadsheets combined. Well behind these figures are the 1.8 million wavering Mirror readers. By contrast, there are as many as eight million who read no daily paper and say that they might change their mind on the euro.

7 Trade union members

Trade unionists are evenly divided on joining the euro – which makes them substantially more favourable to the idea than the public as a whole. They split very narrowly, 48% to 46%, in favour, whereas non-members are opposed by a substantial margin. This support cannot be taken for granted though: 48% of union members are "waverers", keeping an open mind on the issue, they form a key group that in theory might be swung en bloc either way during the run-up to a referendum.

Q. Which of the following best describes your own view of British participation in the single currency?

	All	Union members (16% of adults)	Non members (84% of adults)
	%	%	%
I strongly support British participation	16	22	15
I am generally in favour of British participation, but could be persuaded against it if I thought it would be bad for the British economy	23	26	22
I am generally opposed to British participation, but could be persuaded in favour of it if I thought it would be good for the British economy	22	22	22
I strongly oppose British participation	32	24	33
Don't know	7	5	7
Support	39	48	37
Oppose	54	46	55
"Waverers"	45	48	44

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

The importance of union members in the equation is enhanced by their greater-than-average political activism. They are more likely to say they are absolutely certain to vote at the referendum (56%) than the rest of the public (49%), they are slightly more likely to read a daily newspaper regularly, and more are classified (on the MORI typology) as socio-political activists.

Trade union members' greater support for the euro may partly arise from the fact that they are much more likely than average to have visited another European country in the last year (57% compared with 39% among non-members). This may diminish the extent to which they are vulnerable to campaign arguments from either side, as they do not rely exclusively on information filtered through the British media for their opinions, and they are not confined purely within the British context. At the same time, trade unionists' support for the euro may be influenced in the future by their perception of the experience of euro-zone countries. The other factor in the trade unionists' support for the euro is the high proportion of 35-44 year olds among them, who are much the most pro-euro age group within the British public.

As can be expected, union members are predominantly Labour supporters: 52%, or just over half, of those who declared a voting intention would vote Labour if there were a general election tomorrow, while 21% would vote Conservative, 19% Liberal Democrat and 8% for other parties. Nevertheless, they are not much more satisfied with the way the government is running the country than are non-members (37% of union members are satisfied, 32% of non-members), and they have the same view of Tony Blair's performance as the rest of the public (40% satisfied and 51% dissatisfied). This suggests that the government should not take it for granted that it can use its leverage to increase trade unionists' support for the euro. On the other hand, satisfaction with the way Charles Kennedy is doing his job is substantially higher among trade union members (58%) than non-members (45%), mainly because there are fewer 'don't knows' in the unions. Possibly, therefore, Mr Kennedy rather than Mr Blair would be most effective in selling the euro to the trade union movement – though this strategy may present difficulties in other areas.

Some issues will naturally be more relevant to union members than others. Because of their age profile, union members are much more likely than the public as a whole to be buying their home on a mortgage – almost two-thirds, 63%, are doing so – and must therefore be particularly sensitive to any effect of policy on interest rates. Most also drive or have access to a car. Only 8% of trade union members have no car in their household, compared to 23% of adults who are not union members.

Nevertheless, their political concerns are not far removed from those of the rest of the public. The issues named by trade union members as the single most important facing the country are led by defence/foreign affairs (27%), the National Health Service (17%), crime (9%) and race relations/immigration (9%), the same order as for the public as a whole. Union members are marginally less pessimistic about the economic prospects for the country than the rest of the population (their net economic optimism in November is –24, compared to –33 for non-members).

SECTION TWO:
MAPPING THE BATTLEGROUND

8 The British public and the euro

To identify the euro waverers, our analysis needs two dimensions. First, we need to look at those who, as explained in the previous section, are still open to persuasion on the question. And secondly, we need to look at those who are likely, but not certain, to vote, whose presence or absence might swing the result in one direction or the other. In our survey we also asked the sample to say how likely they were to vote if there was a general election. Their answer to this question is a good indicator of their attitude to voting and their allegiance to political parties, which will play an important role in the referendum campaign and its result.

The battleground consists of five basic groups. The first group, the 'diehards', are absolutely certain they will vote both in a euro referendum and in a general election (22% of adults), and have made up their minds on the euro one way or another. The second group, the 'civic waverers'(13% of adults) are used to turning out to vote at any opportunity, but have not yet been convinced by either side on the euro question. These two groups are analysed together in section one. The third group, the 'politically disconnected' are those who are certain that they would vote in a referendum on the euro but might not, or definitely would not, vote in a general election (15%). The fourth group, the 'apathetic waverers' are those who might vote in the euro referendum but are not certain to do so, assessing their likelihood of voting as between 6 and 9 on a ten-point scale (21%). Finally, there are those who will probably not vote (the remaining 29%). This last group will not be considered in the present study because these individuals are difficult for either side to reach in the referendum campaign, involving disproportionate effort for the number of votes that could be gained, and thus will probably be of marginal importance to the result.

Figure 3
The battleground

		Strongly support	Support but might change mind	Don't know	Oppose but might change mind	Strongly oppose	Total
A	Will vote in referendum and election	8% 3.5m	6% 2.7m	1% 0.3m	6% 2.8m	14% 6.0m	35% 15.3m
B	Will vote in referendum, might/won't vote in election	4% 1.5m	2% 0.7m	* 0.2m	2% 0.9m	8% 3.5m	15% 6.8m
C	Might vote in referendum	2% 0.8m	8% 3.6m	1% 0.4m	6% 2.8m	4% 1.7m	21% 9.2m
D	Unlikely to vote in referendum	3% 1.2m	7% 3.0m	5% 2.2m	7% 3.3m	7% 2.9m	29% 12.7m

Diehards | civic waverers | politically disconnected | apathetic waverers | won't votes

'Diehards' and 'civic waverers': Those certain to vote

This section focuses on those members of the public who are certain they would vote in both a referendum and a general election. This group will be the core of the turnout if and when the euro referendum is held. Many of them will vote because of a sense of duty to participate in the democratic process, as found in MORI's research for the Electoral Commission during the 2001 general election. Nevertheless, their certainty that they would also vote in a general election suggests an interest in political issues and possibly an affinity with one of the political parties – more so, at any rate, than those who doubt their

Figure 4: The diehards and the civic waverers

		Strongly support	Support but might change mind	Don't know	Oppose but might change mind	Strongly oppose	Total
A	Will vote in referendum and election	8%	6%	1%	6%	14%	35%
B	Will vote in referendum, might/won't vote in election	4%	2%	*	2%	8%	15%
C	Might vote in referendum	2%	8%	1%	6%	4%	21%
D	Unlikely to vote in referendum	3%	7%	5%	7%	7%	29%

Diehards civic waverers

likelihood of voting in a general election because of disillusionment with the parties, their leaders or the political choice offered. They may be open to persuasion, may pay attention to the referendum campaign or pre-campaign and allow it to influence their vote; and those who have strong party political allegiances may accept the guidance of their party leaders, or at least take their opinions and arguments into account. Here they have been split into 'diehards', who have made their minds up on the euro already, and 'civic waverers' who are still open to persuasion.

This group makes up 35% of the public, or more than 15 million adults. As might be expected, MORI's socio-political activism scale finds that they are much more politically active in general than the public as a whole. They are far more likely than average to have presented their views to an MP or local councillor in the last few years, more likely to have made a speech before an organised group, to have been an officer of an organisation or club, and to have urged somebody outside their family to vote.

However, those on either side of the debate who have a strong opinion on the euro are likely to be more politically active than those who say they may change their minds. Those with strong views are twice as likely as the 'waverers' to have written a letter to an editor, and are also considerably more likely to say they have taken an active part in a political campaign. On the other hand, and perhaps more surprisingly, the 'waverers' are much more likely to have urged someone outside their own family to vote than those who have made up their minds.

The 'diehards', those who are strongly opposed to joining the euro and the smaller group who are strongly in favour of it are perhaps peripheral to the referendum campaign in the sense that their minds are already made up. It is nevertheless of some interest to understand those who have already decided, and intend to vote.

Of more significance to determining the final result, perhaps, since they admit they might still be swayed, are the two groups of 'civic waverers'. These, especially the wavering "no" voters that supporters of the euro will try to persuade to vote "yes", are the key sections of the electorate who the campaigners will need to win over.

Q. Which of the things on this list, if any, have you done in the last two or three years?

		Certain to vote in both referendum and general election and…			
	All adults %	Strongly support euro %	Support euro but might change mind %	Oppose euro but might change mind %	Strongly oppose euro %
Presented my views to a local councillor or MP	23	29	23	36	33
Written a letter to an editor	13	20	9	8	18
Urged someone outside my family to vote	22	24	30	38	25
Made a speech before an organised group	25	36	35	33	29
Taken an active part in a political campaign	6	10	6	2	9
Helped on fund-raising drives	40	33	37	49	39

Source: MORI/FPC
Base: 1,029 British adults 15+, 14-19 November 2002.

A further small group exists who, though absolutely certain that they would vote in a referendum on the euro, and also that they would vote in a general election, don't know what their opinion of the euro is. Although they made up less than 1% of the sample in our survey, this would still correspond to a third of a million potential votes. Unfortunately, with so few of this group in our sample, it is difficult to draw any reliable conclusions about them. But one set of figures which stand out, even allowing for the tiny sample size, are the numbers giving no opinion on whether the party leaders are doing a good job: 74% don't know whether or not they are satisfied with Iain Duncan Smith (compared to 30% of the whole public), and 76% have no opinion of Charles Kennedy (35% for all adults). This suggests that this is a group substantially disengaged from politics, and who are certainly unlikely to be easily influenced by politicians; their commitment to vote on the euro presumably comes from a sense of duty rather than anything else.

The Diehards

Sub-group A1: The "no" diehards

The largest group are those who **"strongly oppose"** British participation and who are **certain to vote** both in a referendum and at a general election (**14% of the public, or six million adults**). In all probability, the vast majority of this group have indeed made up their minds, and will vote "no" when the time comes. In a sense, this group can be seen as the foundation on which the referendum result will be built. To win a vote on the euro, the government must get at least enough supporters to the polls to outvote this six million, as well as matching every extra vote that turns out against with an extra vote of its own.

Perhaps the most distinctive feature of this group is that they are considerably older on average than the population as a whole. Seven in ten are aged 45 or over; indeed, fully 40% of them are retired. Perhaps as a result, they are less likely than average to have a PC or internet access at home, and barely a quarter have used SMS text messaging on a mobile phone. Similarly a function of their age is that more of them own their homes outright than are still paying off a mortgage. This may make economic arguments centring on interest rates of slightly less relevance to this group than to the rest of the public, but they may be wary of inflation eroding the values of their pensions.

More of this group say they would vote Conservative in a general election than for any other party (of those who give a voting intention, 42% are Conservative, 26% support Labour and 19% the Liberal Democrats), and 70% are dissatisfied with the way Tony Blair is doing his job as Prime

Key characteristics – The ”no” diehards:
14% of British adults (6 million)

Absolutely certain to vote in referendum and in general election, strongly opposed to euro

	Sub-group A1	All GB adults
Sex		
Male	47%	49%
Female	53%	51%
Age		
15-44	31%	52%
45+	69%	48%
Class		
ABC1 (“Middle class”)	58%	51%
C2DE (“Working class”)	41%	49%
Technology		
PC at home	41%	50%
Internet access at home	31%	41%
SMS messaging	28%	42%
Home: Tenure		
Own outright	43%	29%
Buying on mortgage	36%	42%
Not owner-occupied	21%	29%
Voting intention (of those naming a party)		
Conservative	42%	27%
Labour	26%	46%
Liberal Democrat	19%	19%
Other	13%	8%
Satisfaction with the way Tony Blair is doing his job as PM		
Satisfied	27%	40%
Dissatisfied	70%	51%
In the last year have visited…		
France	22%	18%
Spain	10%	17%
No European country outside Britain	63%	56%
Regular newspaper readership (Dailies)		
The Sun	14%	18%
Daily Mirror	8%	12%
Daily Mail	23%	16%
Daily Telegraph	12%	6%
The Guardian	1%	4%
No daily paper	36%	38%

Minister. In short, these are predominantly the government's political opponents on every front, and there is little chance of using government influence or trust to swing their opinions. Yet even among this group, the majority, 52%, are also dissatisfied with the way Iain Duncan Smith is doing his job as Conservative leader, so they cannot be characterised as unbendingly loyal Tories either. As already noted, many of the group are socio-politically active, and they can expect to punch their weight among opinion formers and "movers and shakers".

They are slightly more affluent than average, 58% being in the middle class ABC1 grouping, and 41% having two or more cars in their household. However, only just over a third of them have visited other European countries in the last year, with France being much their most frequent destination – twice as many as have been to Spain, even though among the public as a whole those two destinations are almost equally popular.

In line with their opinions, much their most frequently read newspapers are the Daily Mail and Mail on Sunday, 23% of them reading each regularly. They are also twice as likely as average to read the Daily Telegraph, and very unlikely to read the Guardian or the Observer. Readership of all the "red-top" tabloids is lower than the national average, though the group still includes more Sun readers than Daily Telegraph readers.

Sub-group A2: The "yes" diehards

On the other side, **8% of adults (three-and-a-half million people)** "strongly support" British participation in the single European currency and are certain that they would vote in both referendum and election. The most noticeable feature is how male-dominated the group is: almost two-thirds are men. Their profile is older than average, though to a lesser extent than their opponents in group A1 – younger adults (aged up to 34) are under-represented compared with the population as a whole, while the 55-and-overs are over-represented, but the proportion in the intermediate age group is the same as for the population as a whole.

The group is also predominantly middle class, with the ABs (professional and managerial) particularly high in numbers – indeed, more than a third of the group fall into social grade A or B. Despite their being rather older on average than the rest of the population, their IT access is comparatively high, with half having internet access at home.

This is a group for whom personal contact with the euro is often routine. More than half have been to at least one European country in the last year; a quarter have been to Spain and a quarter to France.

The group's support for the single currency goes hand in hand with support for the government. The group consists mostly of Labour supporters, though also of Liberal Democrats, while just 9% of those who give a voting intention support the Tories. Three in five are satisfied with Tony Blair's performance, and more than half with the government's. While this is in one respect reassuring for the government, it does raise the question of how far support for the government's position on the euro is contingent upon the group remaining satisfied with its performance in other respects. But unless there occurs a dramatic loss of faith in Labour, this group's votes in the referendum can probably be relied upon.

The group's newspaper readership is highly distinctive – more than one in five read the Daily Mirror, perhaps unsurprisingly as it is the most left-wing of the tabloids. But it is certainly surprising that as many as 18% read the Guardian – as many as the three most widely read eurosceptic titles together, the Daily Mail, the Sun and the Daily Telegraph. Indeed, almost a third of all regular Guardian readers are counted among this group, even though it encompasses only 8% of the population. On Sundays, readership of the Guardian's sister paper, the Observer, is almost as high (14%), putting it just ahead of the Sunday Times (13%), with none of the Sunday tabloids reaching double-figure percentages. Only three in ten read no daily paper, though 45% read no Sunday title regularly.

Key characteristics – The "yes" diehards: 8% of British adults (3.5 million)

Absolutely certain to vote in referendum and in general election, strongly in favour of euro

	Sub-group A2	All GB adults
Sex		
Male	63%	49%
Female	37%	51%
Age		
15-34	22%	34%
35-54	35%	34%
55+	44%	32%
Class		
ABC1 ("Middle class")	63%	51%
C2DE ("Working class")	37%	49%
Technology		
PC at home	57%	50%
Internet access at home	50%	41%
Voting intention (of those naming a party)		
Conservative	9%	27%
Labour	61%	46%
Liberal Democrat	26%	19%
Other	4%	8%
Satisfaction with the way Tony Blair is doing his job as PM		
Satisfied	61%	40%
Dissatisfied	36%	51%
In the last year have visited…		
France	27%	18%
Spain	27%	17%
No European country outside Britain	44%	56%
Regular newspaper readership (Dailies)		
The Sun	5%	18%
Daily Mirror	22%	12%
Daily Mail	8%	16%
Daily Telegraph	5%	6%
The Guardian	18%	4%
No daily paper	29%	38%

The 'civic waverers'

Sub-group A3: the "yes" civic wavers

Those who are sure they would vote both in a referendum and in a general election, but say they might change their mind how they would vote (the " civic waverers") make up 12% of the public, equally split between the two camps (around two and three-quarter million on each side).

The **wavering "yes" voters** are predominantly male, predominantly middle-class and are found especially among the middle age bands (aged 35-54), while few are younger than this. Five in six are owner-occupiers, and almost half have a mortgage. The group is highly IT-literate (three in five having a home internet connection), and three in five have visited continental Europe in the last year. They have higher than average readership of the broadsheets, and much lower than average readership of the "red-tops" – indeed, more read the Daily Express than read either The Sun or The Mirror, and more read the Sunday Times than read any single daily (14%).

Although Labour is the single most popular party among this group, support for the Liberal Democrats is very high at 34% of those expressing a voting intention.

There is a potentially significant contrast in the group's assessments of Tony Blair's performance and of the government's. The majority, 53%, express themselves satisfied with the way Mr Blair is doing his job as Prime Minister; however, only 41% are satisfied with the way the government is running the country while 49% are dissatisfied. The gap between the two findings suggests that there are many in this group who cannot be driven by their loyalty to the Labour party or the government but who retain personal respect for Tony Blair. In view of the importance of shoring up this group's support for the euro if he is to have any chance of winning the referendum, it is clear that maintaining this level of personal regard for the Prime Minister may be vitally important.

Key characteristics – the "yes" civic wavers: 6% of British adults (2.75 million)

Absolutely certain to vote in referendum and in general election, generally in favour of euro but may change their minds ("Wavering "yes"")

	Sub-group A3	All GB adults
Sex		
Male	65%	49%
Female	35%	51%
Age		
15-34	14%	34%
35-54	48%	34%
55+	38%	32%
Class		
ABC1 ("Middle class")	70%	51%
C2DE ("Working class")	30%	49%
Cars		
Two or more cars in household	42%	34%
Technology		
PC at home	60%	50%
Internet access at home	59%	41%
Voting intention (of those naming a party)		
Conservative	21%	27%
Labour	38%	46%
Liberal Democrat	34%	19%
Other	7%	8%
In the last year have visited…		
France	29%	18%
Spain	28%	17%
No European country outside Britain	39%	56%
Regular newspaper readership (Dailies)		
The Sun	6%	18%
Daily Mirror	6%	12%
Daily Express	7%	4%
Daily Mail	13%	16%
Daily Telegraph	8%	6%
The Guardian	8%	4%
No daily paper	40%	38%
Economic condition of the country over next 12 months		
Will improve	28%	11%
Will stay the same	39%	41%
Will get worse	29%	43%
Economic optimism index	-1	-32

More significant, perhaps, is that this sub-group, unlike all the others in the sample, is comparatively bullish about Britain's economic prospects. MORI's Economic Optimism Index is based on answers to the question "Do you think that the general economic condition of the country will improve, stay the same or get worse over the next twelve months?" At the moment, the pessimistic section of the British public outnumbers the optimistic, and has done for many months: the EOI for the whole public, calculated as the percentage expecting the economy to improve minus the percentage expecting it to get worse, is –32. For group 3, however, the EOI is –1. Given that this is a group who say their views on the euro may be changed by their perceptions of the economic effect of joining, this may be significant. While it is not clear why their economic opinions are out of step with the rest of the public – and therefore whether this makes them more susceptible to being swung against the euro – it should certainly be borne in mind that this key group apparently perceives economic factors differently, and its reactions to the economic arguments made during the referendum campaign is difficult to predict.

Sub-group A4: the "no" civic waverers

The wavering "no" voters are arguably the most important category of all in the campaign, as they give the anti-euro side its majority yet they say they may change their minds. If all could be persuaded to do so (and everybody else held firm to their current opinions), then it would be the "yes" camp that would have the upper hand.

Though their views on the euro are not immovably fixed, this group still displays a higher than average level of political activism. They are half as likely again as the average to have presented their views to an MP or local councillor (36% to 23%), almost two in five have urged somebody else (outside their own family) to vote, and half (49%) have helped on fund-raising drives of some sort in the last two or three years. A third say they have made a speech before an organised group, though only 2% have taken an active part in a recent political campaign. They are on the whole a sophisticated and politically aware group, and will probably expect to be treated as such. They presumably include many who might be described as "opinion leaders" within their own communities.

The group in some respect resembles the wavering "yes" voters, but is very different in others. The most obvious difference is that there is not the same gender imbalance – there are as many, indeed slightly more, women as men in this category. Like the wavering "yes" voters, this group is more middle-aged than the population as a whole, and especially lacking in 15-24 year olds (15% of the adult population but only 6% of this group). Three in ten (30%) are aged 45-54, twice the average proportion.

They are a middle class and highly affluent group, three-quarters being ABC1s and 42% ABs (professional or managerial). Half of them have two or more cars in their household, and just 9% have no car. Three-quarters have no children living in their household. Very few of the group rent their homes. Two in five (39%) already own their house outright, while half (48%) are buying on a mortgage; interest rates, therefore, will be a factor for many.

They have a higher than average level of home internet connection (54%), though less so than the wavering "yes" voters, and almost two-thirds have access to e-mail, while four in five have mobile phones. They are considerably less likely than the wavering "yes" voters to have visited Europe in the last year, being very close to the national average in this respect. Fewer than half have been to the continent at all over the past twelve months, with France and Spain much the most frequent destinations of those that have. They are most likely to read the Daily Mail or Daily Telegraph, though readership of the Guardian, Independent and Daily Express is also much higher than average. On Sundays, the Sunday Times and Mail on Sunday are their most popular choices.

As with the wavering "yes" voters, Tony Blair's net performance rating with the wavering "no" voters is positive while his government's is negative, though both figures are slightly lower: 49% of the group were satisfied with Mr Blair and 45% dissatisfied, while 39% were satisfied with the government and 54% dissatisfied. The Prime Minister would clearly be well-advised to exploit the fact that his personal standing is so much higher with this key group than the government's. What may be just as significant is the unusually low regard in which this group hold the Conservative leader, Iain Duncan Smith: just 15% say they are satisfied with the way he is doing his job, and 64% are dissatisfied (compared to 47% of the public as a whole); the anti-euro campaign may therefore be well-advised to dissociate itself as far as possible from the Tories, and emphasise its all-party and non-party credentials. Charles Kennedy, though, emerges well, with 54% satisfied with his leadership of the Liberal Democrats. Nevertheless, in terms of general election voting intention, this group is slightly more Conservative, as well as slightly more Liberal Democrat, than average, and slightly less supportive of Labour: Labour leads only by 39% to 32% over the Tories among those who declare a voting intention.

Finally, this group is also more pessimistic about the economy, their net economic optimism being –41 as against –32 for the public as a whole. Their pessimistic perception of the economy stands in contrast to the higher than average optimism of the wavering "yes" voters in Group A3.

Key characteristics – the “no” civic waverers: 6% of British adults (2.75 million)

Absolutely certain to vote in referendum and in general election, generally opposed to euro but may change their minds (“Wavering “no””)

	Sub-group A4	All GB adults
Sex		
Male	47%	49%
Female	53%	51%
Age		
15-34	22%	34%
35-54	43%	34%
55+	34%	32%
Class		
ABC1 (“Middle class”)	75%	51%
C2DE (“Working class”)	25%	49%
Cars		
Two or more cars in household	51%	34%
Technology		
PC at home	57%	50%
Internet access at home	54%	41%
E-mail	63%	43%
Mobile phone	82%	73%
Voting intention (of those naming a party)		
Conservative	32%	27%
Labour	39%	46%
Liberal Democrat	23%	19%
Other	6%	8%
In the last year have visited…		
France	17%	18%
Spain	16%	17%
No European country outside Britain	52%	56%
Regular newspaper readership (Dailies)		
The Sun	10%	18%
Daily Mirror	4%	12%
Daily Express	6%	4%
Daily Mail	21%	16%
Daily Telegraph	15%	6%
The Guardian	7%	4%
No daily paper	43%	38%

The 'politically disconnected'

The 'politically disconnected' are those members of the public who are certain they would vote in the euro referendum but not sure if they would do so in a general election (12% of the electorate or more than five million electors), and those who are certain that they will vote in a referendum but not in a general election (4%/1.6m adults). They, clearly, do not treat voting as an absolute duty, since they admit to at least some doubt that they would vote in a general election; their stance, therefore, is presumably related instead to the importance they attach to the euro as an issue, and perhaps also to uncertainty about the likely outcome. It seems sensible, therefore, to treat this group of potential voters separately from those we have already considered. Presumably these represent those who to a greater or lesser extent are

Figure 5: The politically disconnected

		Strongly support	Support but might change mind	Don't know	Oppose but might change mind	Strongly oppose	Total
A	Will vote in referendum and election	8%	6%	1%	6%	14%	35%
B	Will vote in referendum, might/won't vote in election	4%	2%	*	2%	8%	15%
C	Might vote in referendum	2%	8%	1%	6%	4%	21%
D	Unlikely to vote in referendum	3%	7%	5%	7%	7%	29%

disillusioned with the political parties, and it is reasonable to assume that they will be less likely to take their lead on the euro from party leaders than those who would vote in general elections.

This 15% of the population who are certain they would vote in the euro referendum but might not do so in a general election probably do so because they consider the euro an issue of unusual importance. This attitude is matched by what is in other respects a distinctive demographic and political profile.

This group consists of more men than women, who are more likely than average to be in full time work, and are somewhat younger than average. Almost half of them, 49%, have mortgages. Most have mobile phones (80%, compared to 73% of the adult population as a whole), and 57% have used SMS text-messaging, almost half as many again as the national average.

They are particularly common among readers of The Sun (29% of them read The Sun regularly, compared to 18% of the whole population).

Their next most popular papers are the Daily Mail (18%) and the Mirror (13%), whose readership among this group is close to the average for all British adults. Another 35% read no daily paper regularly (a slightly lower proportion than the rest of the population). They are also slightly more likely than the rest of the public to read a Sunday newspaper (only 40% of them do not, compared to 45% of all adults).

However, this is not a group on which a targeted campaign is likely to be effective. For one thing, they do not appear easily open to persuasion: the vast majority have already made up their minds on the issue, and most are anti-euro. 51% say they strongly oppose British participation, while 23% strongly support it, and just 24% are "waverers" (split 11% in favour, 13% against). Three in five of them (61%) are dissatisfied with the way the government is running the country, and almost as many (59%) with the way Tony Blair is doing his job. We can presume that the parties would have little if any leverage with this group, most of whom in any case seem to have made up their minds which way they will vote.

Key characteristics – the politically disconnected: 15% of British adults (6.8 million)

Absolutely certain to vote in referendum but might not vote at general election

	All adults	Certain to vote in referendum and… Strongly support euro	Waverers	Strongly oppose euro
Percentage of whole sample	100%	4%	4%	8%
Equivalent number of adults		1.5m	1.6m	3.5m
Sample size		n=28	n=33	n=81
	%	%	%	%
Sex				
Male	47	61	50	56
Female	53	39	50	44
Age				
15-34	34	53	44	38
35-54	34	39	22	39
55+	32	8	34	24
Class				
AB	24	17	28	12
C1	27	28	33	29
C2DE	49	55	39	58
Satisfaction with the way…				
…the government is running the country				
Satisfied	33	19	39	19
Dissatisfied	56	60	53	67
…Tony Blair is doing his job as PM				
Satisfied	40	25	41	21
Dissatisfied	51	59	46	68
In the last year have visited…				
France	18	36	14	16
Spain	17	18	19	17
No European country outside the UK	56	39	56	53
Regular readership (daily newspapers)				
The Sun	18	29	17	34
Daily Mail	16	26	22	13
Daily Mirror	12	22	11	10
No daily paper	38	16	39	39

Source: MORI/FPC

The 'apathetic waverers'

The 'apathetic waverers', a further fifth of the electorate, are those who are not certain that they would vote in a referendum on the euro but think it reasonably likely. This group is crucial in a referendum campaign: one side in the campaign may succeed in getting most of its supporters to the poll while the other does not, thus tipping the balance of the referendum outcome in its favour. Moreover, this group contains an unusually high proportion of "waverers" on the euro issue, who are mostly young, less politically engaged and less convinced of the importance of the decision about joining the euro than those who say they will vote in the referendum (even if they might not do so on other occasions). Low turnouts in other recent elections, notably the 2001 general election, should be a reminder that abstention is a genuine danger.

Figure 6: The apathetic waverers

		Strongly support	Support but might change mind	Don't know	Oppose but might change mind	Strongly oppose	Total
A	Will vote in referendum and election	8%	6%	1%	6%	14%	35%
B	Will vote in referendum, might/won't vote in election	4%	2%	*	2%	8%	15%
C	Might vote in referendum	2%	8%	1%	6%	4%	21%
D	Unlikely to vote in referendum	3%	7%	5%	7%	7%	29%

One of the two most noticeable features of the "might votes" is how much younger this group is than those who are certain they will vote. There is nothing unexpected, of course, in finding the young far less committed to voting than the rest of the public, but this demographic factor should certainly have an effect on the types of campaign devised to win this group over. Many of the group will never have voted before, and most, of course, will not have had the opportunity to vote in a referendum before. Anybody old enough to have voted in the 1975 referendum would now be at least 45.

The other noticeable feature is the high number of waverers and don't knows. Two in three of the men in this category, and three in five of the women, have an opinion on the euro but say they might change their mind. The waverers, of course, are the group in which we are especially interested, and we can examine them in detail. The smaller groups who might vote and strongly support or oppose the euro make up too small a fraction of the sample for us to derive a reliable picture of them.

The **wavering "yes" voters**, who the government needs to get to the polls in as large numbers as possible without having their faith in the euro shaken, consist of more men than women. More than half are aged under 35, and seven in ten under 45. They are mostly middle-class (58% ABC1), with a predominance of grade B (35%, compared to 21% in the whole adult population) – in other words young professionals. Three in five are in work, but there are also a significant number of students (14% of the sub-group), who it may be worth targeting separately. More than a third, 35%, are single (neither married nor co-habiting), and many are still living with their parents; while two-thirds live in owner-occupied accommodation, most of the rest (17%) rent in the private sector, twice as many as are in council housing. Half are in households with two or more cars. Three in five have a home internet connection, and a similar number have e-mail. Four in five have a mobile phone.

The majority have visited the continent in the last year, especially France (23%) and Spain (19%), but a very high 16% have also been to

Greece, presumably as a holiday destination. Only 37% have not been across the Channel at all over the last twelve months.

Just over a third read no daily paper regularly, and most of the rest read the popular tabloids – the Sun (22%), Mirror (11%) or Daily Star (11%), though the middle market is also represented, with 13% reading the Daily Mail and 7% the Express. Broadsheet readers, though, are thin on the ground. Most of this sub-group, probably, do not rely on their daily paper for their political opinions. On Sundays, though, 9% read the Sunday Times, but these are outnumbered by devotees of the News of the World (17%), People (12%), Mail on Sunday (10%) and Sunday Express (10%).

Two-thirds of those who would vote support Labour – a very high figure. More are satisfied (48%) than dissatisfied (35%) with the way the government is running the country, and three in five are satisfied with Tony Blair's performance as Prime Minister. This is one group, perhaps, where the government has sufficient respect to fight the argument on the euro for itself.

Perhaps the biggest contrast with the waverers who are certain to vote is that the wavering "might votes" are less likely than average to be socio-politically active. Only 29% say they have helped on fund-raising drives in the last few years (40% of all adults have done so), and 16% have presented their views to a local councillor or MP. On the other hand, a higher than average 17% have written a letter to an editor, and 28% have made a speech before an organised group. All in all, this is a section of the electorate that might be prepared to get involved in a political issue such as Europe especially if they can see its importance to their own immediate interests, at least to the extent of turning out to vote. However, they will not take it for granted as natural that they *should* do so, as will many of the older generation. The salience of the issue as such, rather than any considerations of civic duty, will probably be the determining factor. Perhaps exploiting their apparent contentment with the government, it may be possible to convince them that even if they need not vote on every occasion, they should certainly vote this one.

The **wavering "no" voters** who might vote and need to be persuaded to change their minds also consist primarily of younger citizens (three in five are under 45). However, they are different from the wavering "yes" voters as there are more women (57%) than men. In terms of social class, grade D (semi-skilled and unskilled manual occupations) are particularly numerous, but there is also a very high 11% of As (senior management and professionals) – this is by no means a homogeneous sub-group. Again, the private rented sector outnumbers those in social housing, but almost three-quarters are owner-occupiers. Only one in eight (12%) have no access to a car, compared to 21% of all adults. Just over half have a connection at home to the internet, less than among the pro-euro apathetic waverers but still significantly higher than the 41% population average.

Half this sub-group have visited continental Europe in the last year, with France (26%) and Spain (19%) the countries most frequently visited. One in ten have visited the Netherlands.

Politically, the wavering antis are much less sympathetic to the government. Only 36% of those declaring a voting intention would vote Labour, against 28% for the Liberal Democrats and 25% for the Tories. 55% are dissatisfied with the government and an even higher 58% with Tony Blair. It is unusual for dissatisfaction with the Prime Minister to be higher among any group than dissatisfaction with the government, and this may point to a personalising of political issues among this sub-group that may make it difficult for ministers to successfully appeal to them. They are also highly pessimistic about the economy (just 3% think the economic condition of the country will improve in the next year), so Gordon Brown may be no more appealing to them than Tony Blair.

The Daily Mail (22%) and the Sun (20%) are their most read titles in the daily press, but a very high 49% read no paper regularly. This is a group it may be difficult to target in order to swing their votes, but there is a possibility that the anti-euro camp will find it equally difficult. A differentially higher turnout among those already supporting the euro may be a more realistic hope than a swing among those who oppose it and are unsure whether they will vote.

Key characteristics – the apathetic waverers: 14% of British adults (6.4 million)

Might vote in referendum (certainty of voting 6-9)

		Might vote in referendum and…	
	All adults	Support euro but might change mind	Oppose euro but might change mind
Percentage of whole sample	100%	8%	6%
Equivalent number of adults		3.6m	2.8m
Sample size		n=73	N=62
	%	%	%
Sex			
Male	47	56	43
Female	53	44	57
Age			
15-34	34	53	44
35-54	34	28	32
55+	32	19	25
Class			
ABC1	51	58	48
C2DE	49	42	52
Satisfaction with the way…			
…the government is running the country			
Satisfied	33	48	31
Dissatisfied	56	35	55
…Tony Blair is doing his job as PM			
Satisfied	40	60	37
Dissatisfied	51	31	58
In the last year have visited…			
France	18	23	26
Spain	17	19	19
No European country outside the UK	56	37	50
Regular readership (daily newspapers)			
The Sun	18	22	22
Daily Mail	16	13	22
Daily Mirror	12	11	10
No daily newspaper	38	35	49

Source: MORI/FPC

Conclusion: How can the "yes" side win?

It is clear that many supporters of the euro believed that British support for the single currency would naturally grow as it was introduced and successfully used on the continent. This they hoped would happen without any need for great effort on their part, until there was a sufficient majority in favour to make calling a referendum almost a formality. If this optimistic scenario was ever part of the government's strategy, it should by now be clear that it will not materialise in the foreseeable future. If the government wants Britain to join the euro, there is going to have to be an active campaign to win over support and to ensure that those supporters turn out to vote.

It is equally clear that this will be no easy task. Opponents of the single currency outnumber its supporters and declare themselves more likely to vote, and the current political atmosphere does not seem especially conducive to politicians effectively appealing to the hearts and minds of voters. The window of opportunity for the "yes" camp lies in the substantial section of the public which admits it still keeps an open mind on the issue, quite enough to form a majority in favour if all can be swung over. No doubt the government will have fond memories of the last national referendum, in 1975, when Harold Wilson achieved a 22% swing in favour of the Common Market (as it then was) in just six months, relying on the public's confidence in the government and its assurances that the renegotiated terms of membership represented a good deal for Britain.

The world has of course moved on since 1975. This pamphlet has attempted to identify some of the key factors that will affect the possibility of calling and winning a referendum in the near future, and in particular to pick out the groups whose opinions it is most important to sway, or to prevent opponents from swaying.

But the task for the "yes" camp will be a difficult one. In particular, two questions can be raised. The first centres on whether the government

Figure 7: How can the "yes" side win?

		Strongly support	Support but might change mind	Don't know	Oppose but might change mind	Strongly oppose	Total
A	Will vote in referendum and election	3.5	2.7	0.3	2.8	6.0	15.3
B	Will vote in referendum, might/won't vote in election	1.5	0.7	0.7	0.9	3.5	6.8
C	Might vote in referendum	0.8	3.6	0.4	2.8	1.7	9.2
D	Unlikely to vote in referendum	1.2	3.0	2.2	3.3	2.9	12.7

Yes | Shared between Yes and No | No

and its political allies can by themselves wield sufficient influence to swing the opinions of enough people, given that the political world is held in such low regard these days. They will need the support of business leaders, union leaders, media commentators and other prominent figures respected by the public.

Second, is the question whether such a swing of opinion can be achieved in the presumably short period between announcing the government's intention to hold a referendum and polling day; indeed, it could be foolhardy to call such a referendum unless a swing in opinion had at least started to emerge. If the referendum is to be won, the campaign must start long before the government must make its decision to call it. On the assumption that the government may well be reluctant to commit itself in this way, the onus would seem to be with the non-party friends of the euro to make the running, in the hope that they can achieve some momentum in the euro's favour and make the government's decision easier when the time comes.

Of course, this is happening to some degree already and is so far achieving no perceptible movement in public sentiment. But it is possible that greater concentration on the key target groups identified in this pamphlet may be more effective. Two groups in particular stand out, and are distinct and different from each other. First, those who are opposed to the euro but might change their mind and who vote as a matter of course. They need to be persuaded to switch their allegiance. Second, those who generally support the euro and *might* vote in the referendum but are not certain they will do so. These people need to be enthused sufficiently to be sure they turn out. The former group are predominantly affluent, middle-aged and middle class, politically interested and active; their view of Tony Blair is a little better than their view of his government; they are particularly likely to read the Daily Mail or Telegraph. The latter group are young, many professionals or students who are used to visiting Europe on holiday, but less interested in politics and most likely to read a "red-top" tabloid; they view both the government and Prime Minister broadly positively. Here then, perhaps, is an opportunity for political leadership to swing the day. It may be that the result of the referendum will rest on the ability of euro supporters to control the votes of these two groups.

One way to think about what this might mean in practice is to construct an indicative scenario for a "yes" victory. To do this, we need to make a certain number of assumption, and we have used the table above to help us develop one possible outcome.

The electorate for a euro referendum is likely to be in the region of 44 million adults. If we assume that the 12.7 million who now say they are unlikely to vote do not turn out on the day, we might look at what could happen if the remaining 31.3 million cast their vote. This would equate to a turnout of 71%; rather higher than in the 2001 general election, but a figure which is not out of line with previous elections or indeed the turnout at the 1975 referendum. Under these circumstances, the “yes” camp would need to achieve 15.7 million votes in order to secure a narrow majority. Let us now assume that all of those who strongly support the euro do vote in favour (5.8 million), and, more critically, that the “yes” camp is also able to keep all those in the wavering yes category (7.0 million). This brings the total yes vote to 12.8 million – almost 3 million short of the target.

The “yes” camp would therefore need support from those who are currently in other groups. For them to move one of these groups en masse would certainly seem to be a rather remote possibility. But what if we make the – perhaps rather heroic – assumption that they may be able to turn around half of the people in the target groups? Our chart provides one possible route to success. If the “yes” camp were indeed able to persuade half of those in the don't know category to vote in favour, they would have another 0.45 million to their total (bringing them to 13.25 million). And if they were then able to achieve the more challenging task of persuading half of those currently in the "wavering no" camp, they would have another 3.25 million, bringing the total to 16.5 million – some 800,000 votes ahead of their target.

Such a swing in public opinion would be greater than at any general election since the war. Supporters of the euro have their work cut out.

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