# HALF-TIME IN THE BREXIT NEGOTIATIONS: THE VOTERS' SCORECARD

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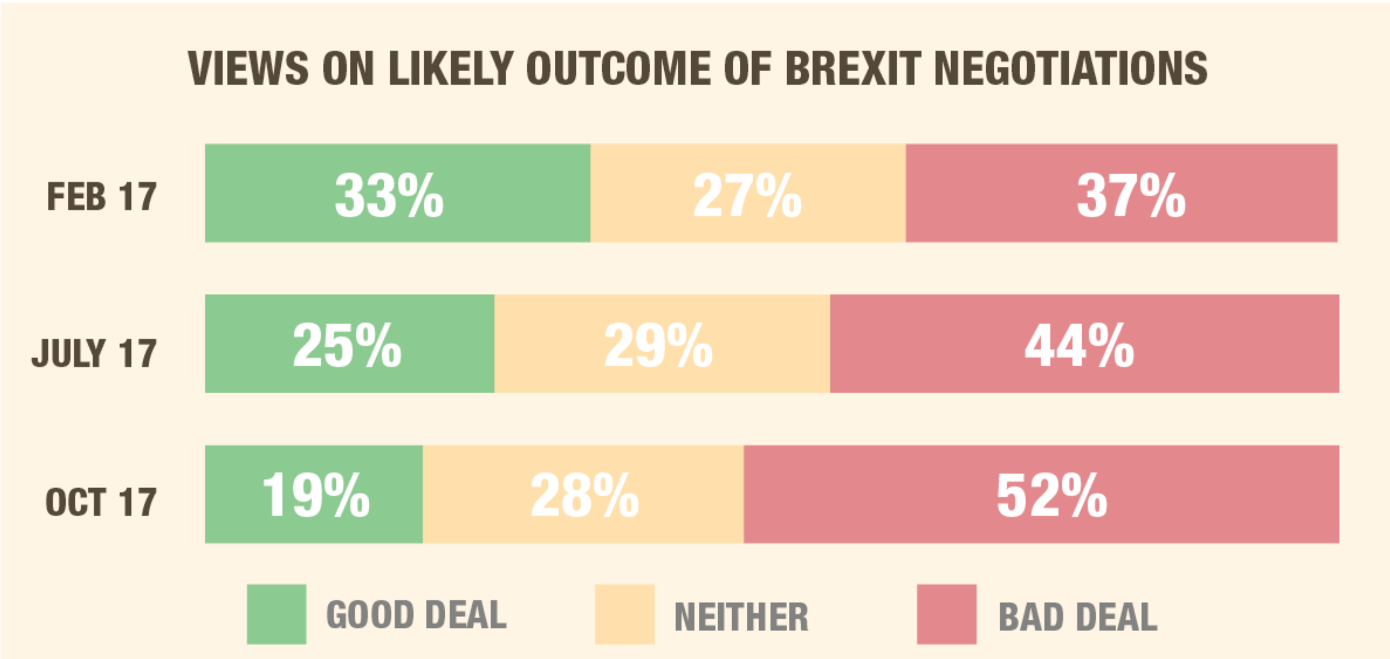
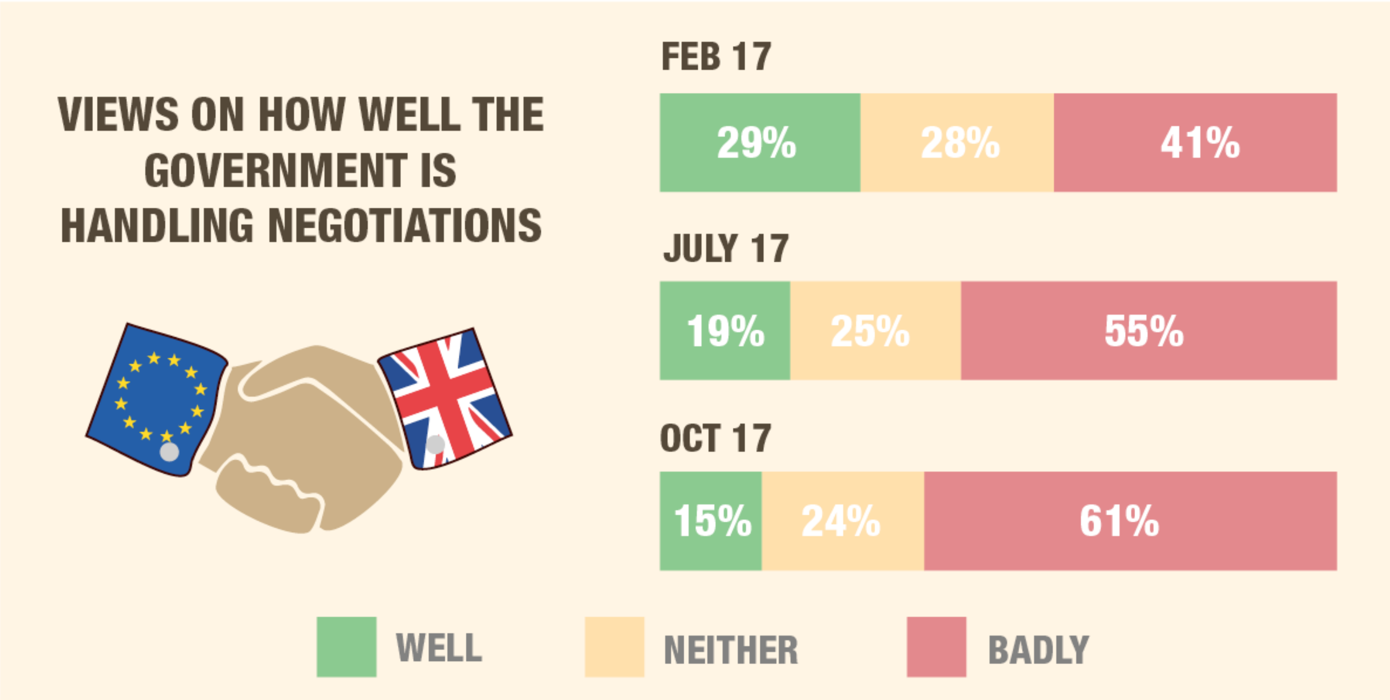
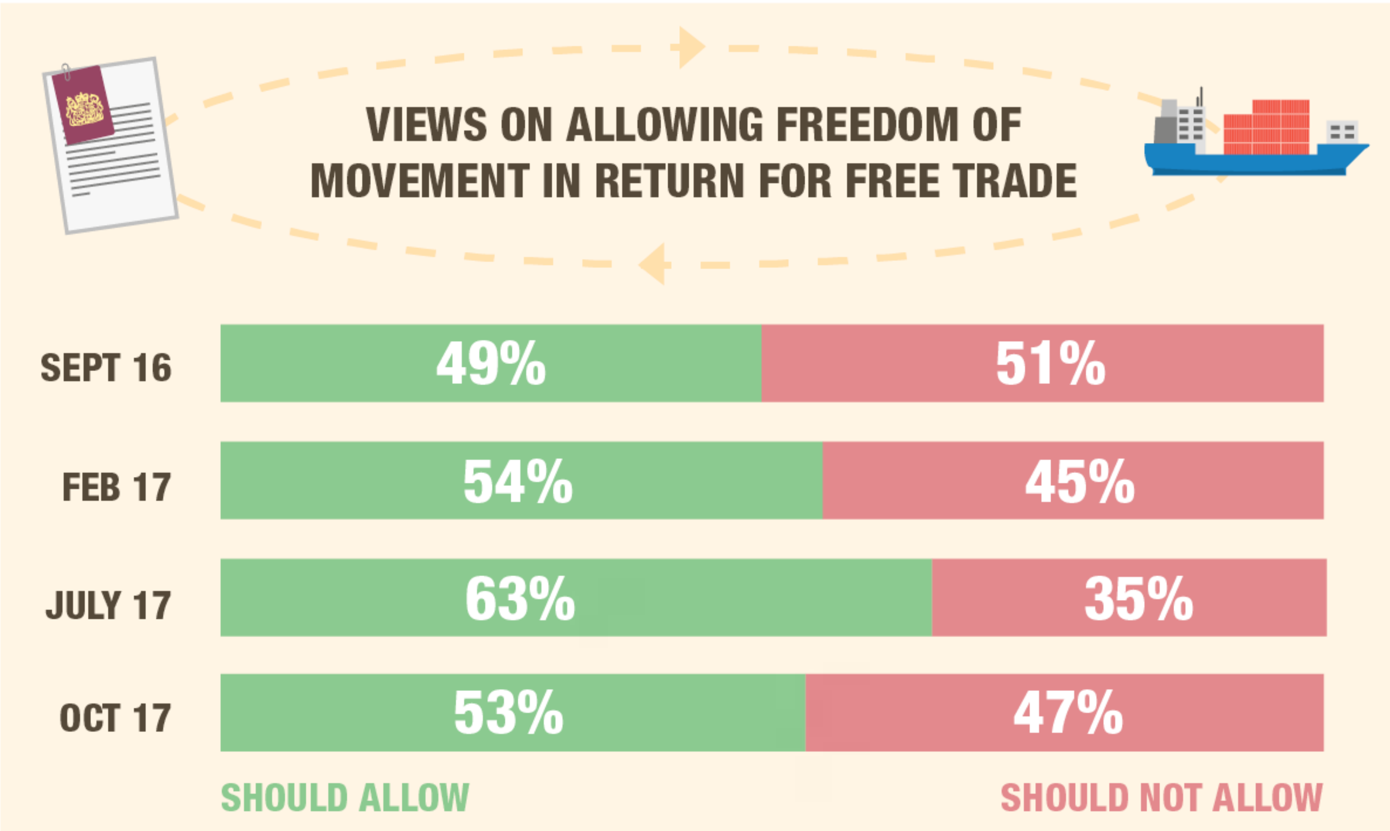
Voters have become more pessimistic about the likely outcome of the Brexit negotiations.



Voters increasingly think that both the UK government and the EU are handling the Brexit negotiations badly.




However, there is no consistent evidence that voters have changed their views as what kind of Brexit they would like to see



## INTRODUCTION

At the end of last year and again earlier this year, we reported the findings of extensive research into what voters wanted to emerge from the Brexit process (Curtice, 2016; Curtice, 2017a). Since then the UK has given formal notice of its intention to leave the EU, and following a general election in June in which the Prime Minister attempted but failed to secure a clear mandate for her vision of Brexit, the first phase of the negotiations between the UK and the EU has got underway but has yet to reach a conclusion. We are now just over half-way between when the EU referendum was held (23 June 2016) and the date the UK is scheduled to leave the EU (29 March 2019).

Since the election, we have returned to our unique panel of respondents – people who were first selected at random to participate in the British Social Attitudes survey and who have agreed to take part in subsequent follow-up surveys – on two further occasions, once in July shortly after the general election, and a second time in October, by which point the negotiations with the EU were well under way. Although these two surveys continued to pay attention to what voters want from Brexit, their emphasis shifted towards tracking how voters' evaluations and expectations of the Brexit process have evolved as the negotiations have progressed. Of course, in shifting the focus, one key question in which we were interested was whether voters' evaluations of the Brexit process were having any impact on their preferences for the kind of deal they would like to see in the first place.

This report unveils the initial findings of these two new waves of research. We focus on three issues. First, we ascertain the extent to which voters' evaluations of the Brexit process have changed in recent months. How well do they think the negotiations are going? Have their expectations of what Brexit might mean altered at all? We then look at whether what voters want from Brexit has changed, and in so doing, report the findings of some new questions we have asked in this area. Finally, we assess whether voters' evaluations of the Brexit negotiations have had any discernible impact on their attitudes towards what those negotiations should deliver.

## DATA

As noted above, our data are taken from two surveys of a panel of respondents who initially participated in either the 2015 or the 2016 British Social Attitudes survey (BSA), a high quality exercise conducted annually by NatCen and for which potential respondents are selected at random via the Postcode Address file (Clery et al., 2017). For both surveys interviews were undertaken over a period of four weeks, in most cases via the internet but where necessary by phone. The first wave of interviewing was conducted between 6 July and 6 August; 2,184 people participated, which represented 60% of the panellists who were invited to participate in the survey. The second wave was undertaken between 28 September and 29 October and secured responses from 2,168 people, or 61% of those to whom the questionnaire was sent. In both cases, the data have been weighted to match the known profile of the adult population and to counteract the impact of differential attrition, that is, any tendency for those who have participated in these follow-up surveys to be different in their outlook and motivations from all those who participated in the original BSA surveys. This approach – internet polling supplemented by phone interviews, a four week interview period, and the selection of respondents via a random probability approach – is unique to survey research in Britain, and aims to combine the speed and efficiency of the internet with the expectation that a relatively long fieldwork period and the use of random sampling will enhance the quality of the sample (Jessop, 2017).

One indication of the likely representativeness of our findings is, of course, how closely the reported vote of those who participated in our two most recent waves of interviewing matches the outcome of the EU referendum in June 2016. In both waves, after weighting, 51% said that they voted for Remain, and 49% for Leave. Thus, our weighted data contain slightly more Remain voters than voted for that option in the referendum (48%), but for all practical purposes our sample reflects the very even division of opinion on the merits of Brexit that was in evidence when the UK voted on the issue on June 23 2016.

## EXPECTATIONS AND EVALUATIONS

### Consequences of Leaving

When voters went to the polls in June of last year, they had to evaluate what they thought would be the consequences of leaving the EU. Poll after poll found that a majority anticipated that immigration would fall, but also that more thought the economy would suffer than reckoned it would benefit (Clarke al., 2017: 47). Our panel was no different when they were interviewed in the weeks leading up to the referendum (Cabrera-Alvarez et al., 2016). On the one hand, as Tables 1 and 2 show, nearly two-thirds thought that immigration would be lower, while, at just over two-fifths, the proportion that thought the economy would be worse off was considerably greater than the quarter or so who thought it would be better off.

**Table 1. Expectations of the Consequences of Leaving the EU for Immigration, June 2016-October 2017**

| | 2016 | | 2017 | | |
|---|---|---|---|---|---|
| | **June** | **Sept** | **Feb** | **July** | **Oct** |
| **Expect Brexit to mean immigration will be:** | % | % | % | % | % |
| Higher | 7 | 7 | 7 | 9 | 7 |
| Not much difference | 28 | 53 | 48 | 52 | 50 |
| Lower | 64 | 38 | 43 | 39 | 43 |
| Net: Higher-Lower | +57 | +31 | +36 | +30 | +36 |

June 2016: *If Britain were to leave the EU, do you think immigration to Britain would be higher, lower, or wouldn't it make much difference?* Sept 2016-Oct 2017: *From what you have seen and heard so far, do you think that as a result of leaving the EU immigration to Britain will be higher, lower, or won't it make much difference?*

**Table 2 Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – October 2017**

| | 2016 | | 2017 | | |
|---|---|---|---|---|---|
| | June | Sept | Feb | July | Oct |
| **Expect Brexit to mean economy will be:** | % | % | % | % | % |
| Better Off | 29 | 30 | 29 | 24 | 25 |
| Not much difference | 29 | 25 | 23 | 26 | 22 |
| Worse Off | 39 | 48 | 46 | 49 | 52 |
| Net: Better Off – Worse Off | -10 | -18 | -17 | -25 | -27 |

June 2016: *If Britain were to leave the EU, do you think Britain's economy would be better off, worse off, or wouldn't it make much difference?* Sept 2016-Oct 2017: *From what you have seen and heard so far, do you think that as a result of leaving the EU Britain's economy will be better off, worse off, or won't it make much difference?*

However, when we returned to the panel just three months after the EU referendum, the proportion anticipating that immigration would drop had already fallen quite markedly, to slightly less than two in five. However, there has been little evidence of a consistent trend since then. The widespread expectation that Brexit would bring about a reduction in immigration apparently lost some of its impetus as soon as the referendum was over, but it seems that subsequently the Brexit process itself has not affected voters' expectations of what Brexit will mean for immigration.

The same cannot be said of expectations of the economic consequences of leaving the EU. Since the general election in June at least, rather more voters have come to the conclusion that the economy will be worse off as a result. Indeed, as Table 2 shows, the proportion expressing that view now stands at over a half. Around twice as many people think the economy will be worse off than believe it will be better off. Of course, this somewhat greater pessimism may reflect the fact that, although initially Brexit appeared to make little difference to the economy, more recently the decline in the value of the pound following the referendum result can be said to have reduced living standards (Breinlich et al., 2017). But equally the greater pessimism about the economy could have been occasioned by a decline in confidence in the government's ability to handle the economy following a general election campaign that appeared to damage the Conservatives' reputation for good government more generally (Ashcroft, 2017).

## The Negotiations

But what do voters make of the Brexit process itself? Are they, in fact, hopeful that the government will be able to deliver the 'good deal for Britain' that has been promised by David Davis, the minister in charge of the Brexit negotiations (Davis, 2017) - or have doubts set in? And how well or badly do they think the negotiations are being handled not only by the UK government but also by the EU? These talks have, after all, appeared to have hit some difficulties in recent weeks, with the EU deciding in October to postpone the beginning of the second phase of the talks (on the proposed two year transition period and the UK's future relationship with the EU) because the first phase (on the divorce arrangements) had not in its view made sufficient progress. Perhaps this development has increased concern amongst voters?

At each of the last three waves of interviewing we have asked our respondents how good or bad a deal they expected the UK would get out of the Brexit negotiations. At the beginning of the year, not long after the Prime Minister laid out her vision of Brexit in a speech at Lancaster House (May, 2017), almost as many – one in three - thought the UK would emerge with a good deal as thought it would end up with a bad one (see Table 3). But now only around one in five think Britain will get a good deal, while about a half reckon we will get a bad one. Around a half of the apparent decline in confidence was in evidence immediately after the election, providing further apparent evidence that that event had an adverse impact on how voters viewed the government's handling of the Brexit process. However, that apparent erosion of confidence has continued into the autumn. In any event, voters have apparently become markedly more pessimistic about the likely outcome of the negotiations.

**Table 3 Expectations of Whether the UK Will Get a Good or Bad Deal out of the Brexit Talks, February-October 2017**

| | Feb | July | Oct |
|---|---|---|---|
| | % | % | % |
| Good Deal | 33 | 25 | 19 |
| Neither Good Nor Bad | 27 | 29 | 28 |
| Bad Deal | 37 | 44 | 52 |

But is it the case that voters have become more critical of how the UK government is handling the Brexit negotiations? Although the government was not getting many plaudits even before it gave formal notice in March that the UK wished to leave the EU, there has, as the first half of Table 4 shows, been a marked increase in the proportion who think the government has handled the negotiations badly. Back in February, around two in five were of that view, while around three in ten reckoned it was performing well. Now as many as three in five think the government has handled the negotiations badly, around four times as many as think it has dealt with them well. Again, much of the increased criticism was in evidence shortly after the election, though here also confidence seem to have eroded yet further in subsequent weeks and months.

**Table 4 Perceptions of Whether the UK Government and the EU Have Handled the Brexit Negotiations Well/Badly, February-October 2017**

| | Feb | July | Oct |
|---|---|---|---|
| | % | % | % |
| **UK Government** | | | |
| Well | 29 | 19 | 15 |
| Neither Well Nor Badly | 28 | 25 | 24 |
| Badly | 41 | 55 | 61 |
| **The EU** | | | |
| Well | 17 | 21 | 17 |
| Neither Well Nor Badly | 35 | 31 | 25 |
| Badly | 46 | 47 | 57 |

UK Government: *From what you have seen and heard so far, would you say that the UK government is handling Britain's exit from the EU well or badly?* The EU*: And from what you have seen and heard so far, would you say that the EU is handling Britain's exit from the EU well or badly?*

However, that does not necessarily mean that voters believe the EU has been doing a good job in the Brexit talks. Even at the beginning of the year, not far short of half of all voters felt the EU was handling the negotiations badly. And although this proportion was little changed by July, now it has increased to as much as 57%. If the UK government is widely thought to be struggling in the EU negotiations, it would seem that the tactics deployed by the EU have done nothing to endear that institution to voters in Britain. This is, perhaps, an important reminder that we should not presume that the UK government will necessarily get the blame if Britain does emerge from the negotiations with what is widely regarded as a 'bad' deal. At the moment, at least, with no less than 41% of voters thinking that both the UK and the EU government have performed badly, many evidently feel that the fault for the relative lack of progress in the talks lies on both sides of the negotiating table.

## The Meaning of Brexit

Of course, voters' views of what will constitute a good or bad deal at the end of the Brexit negotiations will depend in part on what they hoped it might contain in the first place. We will turn later to what those hopes currently are. But in the meantime, can examine some evidence from our two new waves of interviewing as to how likely it is thought that certain specific proposals will form part of the agreement. In particular, the UK government has indicated that it wishes to secure a free trade agreement with the EU that will enable trade between Britain and the EU bloc to be as 'frictionless' as possible, but at the same time has stated that the UK would no longer adhere to the freedom of movement provisions of the EU – a proposed combination whose likelihood, if not necessarily its desirability, has been questioned (Bienkov, 2017; May, 2017).

Voters' attitudes towards the likelihood that Brexit would bring about an end to freedom of movement were ascertained by asking the following:

> **From what you have heard and seen so far – and leaving aside whether you would like it included or not – how likely or unlikely do you think it is that the agreement will require people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU?**

Meanwhile, to assess how likely voters thought it would be that the agreement between the UK and the EU would produce a wide-ranging free trade agreement we asked:

> **From what you have heard and seen so far how likely or unlikely do you think it is that the agreement will allow companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU?**

In addition, in our most recent survey we also addressed a more mundane issue, but one that potentially has a more immediate impact on the everyday life of the ordinary voter, that is, whether the roaming charges that used to be applied to mobile phone calls made between different EU countries but were scrapped by the EU earlier this year should continue to be outlawed after the UK has left the EU. We asked:

> **From what you have heard and seen so far how likely or unlikely do you think it is that the agreement will require British mobile phone companies to follow EU regulations that limit what they can charge customers for calls made abroad?**

**Table 5 Perceptions of the Likelihood of Certain Provisions Being Part of the Brexit Agreement, July and October 2017.**

| | Free Trade | | Immigration Control | | Roaming Charges |
|---|---|---|---|---|---|
| | July | Oct | July | Oct | Oct |
| | % | % | % | % | % |
| Very Likely | 14 | 10 | 12 | 11 | 9 |
| Quite Likely | 45 | 40 | 41 | 39 | 34 |
| Neither Likely Nor Unlikely | 19 | 21 | 22 | 19 | 29 |
| Quite Unlikely | 18 | 22 | 20 | 25 | 18 |
| Very Unlikely | 2 | 6 | 4 | 4 | 7 |

Table 5 reveals that around a half of voters think that it is either 'very' or 'quite' likely that there will be a free trade agreement between the UK and the EU, while the same proportion hold that view with respect to the UK being able to control migration from the EU in the same way as it does that from those outside the EU. The glass might be thought to be half full or half empty, according to taste. That said, we should note that in both instances the proportion who think it likely that the provision will form part of the agreement has fallen since July. Meanwhile, of course, those who expect one of these two possibilities to be delivered are not necessarily the same as those who expect the other to be achieved. Indeed, only 29% think that both free trade and immigration control will be secured – which perhaps helps explain why there appears to be considerable scepticism about the UK government's ability to deliver its vision for Brexit. At the same time, at present only 43% think it likely that within EU roaming charges will continue to be abolished for customers of UK telephone companies after Brexit – not least it seems because nearly a third are simply not sure about the likely outcome of an issue that, despite its apparent immediacy for voters, has so far received very little media attention.

Overall, then, the public appears to have become relatively pessimistic about what will emerge from the Brexit negotiations. More now think that the UK will get a bad deal out of the negotiations and that the economy will be worse off as a result. There has also been something of a decline in the proportion who think that either a free trade deal or immigration control will be achieved. Meanwhile, it seems that at least some of the blame for this apparent state of affairs is thought to rest with the UK government, confidence in which has declined since the general election in June, though criticism of the EU also seems to be more widespread too.

## SOURCES OF PESSIMISM

However, there are two very different trends that could lie underneath these patterns. On the one hand, it may be that those who voted Remain have become confirmed in their view that Brexit is a bad idea and have consequently become both more pessimistic about its consequences and more critical of the government that is pursuing it. In that case, there is no necessary reason to anticipate that the greater pessimism we have uncovered will have changed the balance of opinion about what kind of Brexit would be preferable. On the other hand, it could be that those who voted Leave have become disenchanted about the Brexit process. In that event, we might wonder whether this has changed their views about what Brexit should mean.

**Table 6 Expectations of the Consequences of Leaving the EU for the Economy by EU Referendum Vote, February and October 2017.**

| | Remain Voters | | | Leave Voters | | |
|---|---|---|---|---|---|---|
| Expect Brexit to mean economy will be: | Feb % | Oct % | Change | Feb % | Oct % | Change |
| Better Off | 7 | 6 | -1 | 54 | 45 | -9 |
| Not Much Difference | 13 | 11 | -2 | 30 | 34 | +4 |
| Worse Off | 78 | 81 | +3 | 15 | 21 | +6 |

In truth, as we can see from Table 6, most of those who voted Remain were already very pessimistic about the economic consequences at the beginning of this year. Around four in five of them were already of that view, leaving limited scope for the figure to increase. Given that most of those who were pessimistic about the economic consequences voted to Remain in the first place, this picture is hardly surprising (Curtice, 2017b). But it does mean that most of the increase in economic pessimism has occurred amongst Leave voters, less than half of whom now think that leaving the EU will make the economy better off.

**Table 7 Expectations of Whether The UK Will Get a Good or Bad Deal out of the Brexit Talks by EU Referendum Vote, February and October 2017**

| | Remain Voters | | | Leave Voters | | |
|---|---|---|---|---|---|---|
| | **Feb** | **Oct** | **Change** | **Feb** | **Oct** | **Change** |
| | % | % | | % | % | |
| Good Deal | 17 | 11 | -6 | 51 | 28 | -23 |
| Neither Good Nor Bad | 25 | 20 | -5 | 27 | 33 | +6 |
| Bad Deal | 56 | 68 | +12 | 20 | 38 | +18 |

In contrast, at the beginning of this year there was nothing like near consensus amongst Remain voters that Britain would get a bad deal. The figure stood at 56%, leaving plenty of scope for the figure to increase further – which it duly has done, to just over two-thirds. Even so, the movement has been even greater amongst those who voted to Leave, who now appear to be much less confident that the UK will get a good deal. Only just over a quarter currently hold that view, compared with around a half in February. Concern about the quality of the deal that Britain will be able to secure is evidently far from confined to Remain voters reluctant to accommodate themselves to the fact that the UK government is intent on leaving the EU – it is also now quite common amongst Leave voters.

**Table 8 Perceptions of Whether the UK Government and the EU Have Handled the Brexit Negotiations Well/Badly by EU Referendum Vote, February and October 2017**

| | Remain Voters | | | Leave Voters | | |
|---|---|---|---|---|---|---|
| | Feb | Oct | Change | Feb | Oct | Change |
| | % | % | | % | % | |
| **UK Government** | | | | | | |
| Well | 18 | 9 | -9 | 42 | 21 | -21 |
| Neither Well Nor Badly | 26 | 19 | -7 | 29 | 28 | -1 |
| Badly | 55 | 71 | +16 | 27 | 50 | +23 |
| **The EU** | | | | | | |
| Well | 17 | 22 | +5 | 16 | 10 | -6 |
| Neither Well Nor Badly | 38 | 27 | -11 | 28 | 19 | -9 |
| Badly | 42 | 50 | +8 | 55 | 71 | +16 |

Much the same picture emerges if we look at evaluations of how well the government has been handling Brexit. Remain voters have indeed become more critical; the proportion who think that the UK government has been handling the negotiations badly has increased from 55% to 71%. Yet the turnaround amongst Leave voters has been even sharper. Not only has there been a 23-point increase in the proportion of Leave voters who believe that the government has been dealing with the issue badly, but also this has been accompanied by as much as a 21-point drop in the proportion who think that the UK government has been performing well in the negotiations.

This, perhaps, is particularly remarkable given that most Leave voters voted for the Conservatives in June and thus might be thought to be relatively well disposed towards the incumbent government (Curtice, 2017c). Yet amongst all those who voted Conservative in June, just 28% now say that the UK government had handled the Brexit negotiations well. In contrast, in February as many as 50% of those who at that stage said they would vote Conservative in an immediate election felt the negotiations were being handled well. The decline in confidence in the UK government's handling of Brexit cannot simply be blamed on a partisan reaction against the UK government by Labour voters.

Less surprisingly, perhaps, Leave voters have also become more critical of the way that the EU is handling the Brexit talks. Some 71% now feel the EU has been conducting the talks badly, up 16 points on the 55% who were of that view in February. In contrast, Remain voters appear to have become more sharply divided in their evaluations of the EU's role. There has apparently been an increase both in the proportion who think the EU has been handling the negotiations well and in the proportion who feel that it has been doing so badly. It would seem that while there are some Remain voters who feel that the EU have been right in taking what many have regarded as a relatively tough stance in the EU negotiations, there are others who feel that it has contributed to the apparent difficulties between the two sides.

In any event, it is clear that the increase in pessimism about the likely outcome of the Brexit negotiations has not simply occurred amongst those who voted to Remain in the EU. Rather, if anything, the increase has been more marked amongst Leave voters. That suggests, we certainly cannot assume that the Brexit process has left attitudes towards the shape of Brexit unaltered. Perhaps the greater pessimism about Brexit amongst Leave voters has persuaded some of them that leaving the EU was not such a good idea after all?

## HAVE ATTITUDES TOWARDS BREXIT CHANGED?

The two most important issues in the debate about the future shape of the UK's relationship with the EU are widely thought to be free trade and immigration. On the one hand the UK government wishes to end freedom of movement for EU citizens to move to the UK but on the other to continue to be able to trade freely with the EU (May, 2017). Such a stance contravenes the EU's position that the so-called 'four freedoms', including free trade and free movement, inextricably go together (European Parliament, 2017). To establish where public opinion lies on this subject we have in each of our last four surveys asked respondents whether the following items should be included in the agreement between the UK and the EU.

> **Allowing companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU**
>
> **Requiring people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU?**

As Table 9 shows, and we have highlighted before, a majority of voters apparently support the continuation of free trade, but at the same time believe that potential EU migrants should have to apply to come to the UK in much the same way as non-EU migrants. And as far as free trade is concerned, there is little sign that the very high level of support we first registered twelve months ago is diminishing. But given that our proposition on free trade would constitute part of the 'soft' Brexit that is preferred by many Remain voters, there is no reason why we should expect increased pessimism about Brexit amongst Leave voters to have resulted in any marked change of attitude about this item.

**Table 9 Attitudes towards Free Trade and EU Migration, Sept 2016-Oct 2017**

| | Sep 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| | % | % | % | % |
| **Free Trade** | | | | |
| In favour | 90 | 88 | 87 | 88 |
| Neither | 8 | 9 | 10 | 9 |
| Against | 2 | 3 | 2 | 3 |
| **Treat EU Immigs Like Non-EU** | | | | |
| In favour | 74 | 68 | 68 | 64 |
| Neither | 12 | 16 | 14 | 15 |
| Against | 13 | 15 | 17 | 20 |

The same, however, cannot be said of the idea that EU migrants should have to apply to come to the UK. As we can see from the bottom half of Table 9, there is some sign that support for this proposition has diminished somewhat. Slightly less than two-thirds now back the idea, as compared with nearly three-quarters a year ago. However, we need to be careful about making any claim that this drop has been occasioned by the recent increase in pessimism about the handling and the outcome of Brexit. Much of the drop had already occurred by the beginning of this year, before the trend towards greater pessimism was in evidence. Moreover, as it happens, the decline in support has been rather greater amongst Remain voters (a fall of 13 points between September 2016 and October 2017) than amongst Leave voters (a fall of seven points).

At this point, however, we should also report on the answers we obtained in our most recent survey to a new question about the trading relationship between the UK and the EU, a question that focused in particular on whether the UK and the EU should be allowed to impose tariffs (although we avoid the use of that word as it may not be widely understood) on each other's imported goods. The proposition read as follows:

> **What about allowing Britain to put a tax on goods imported from the EU, while allowing the EU to put a tax on goods imported from Britain? To what extent would you be in favour or against that being part of the agreement?**

This secured rather more agreement than we might have anticipated given the near unanimity in responses to our question on free trade. Just under a quarter (24%) said that it should be possible to impose tariffs. That said, they are heavily outnumbered by the near half (49%) who actively disagree with the idea. So, although there may be some protectionist sentiment amongst the British public, it is evidently a minority view. Even amongst those who voted to Leave only 30% are in favour of the idea, while 39% are against. Meanwhile, as we might anticipate only 18% of Remain voters are in favour while 58% are against.

But to return to our theme as to whether attitudes towards the shape of Brexit have changed. In our most recent survey we also repeated an item about one of the more immediate everyday issues in the EU, the cost of mobile phone calls made while abroad. We asked whether the Brexit deal should include:

> **Requiring British mobile phone companies to follow EU regulations that limit what they can charge customers for calls made abroad**

Nearly a quarter (74%) said that they were in favour of this being part of the agreement. This represents a small (and statistically insignificant) three point increase on our reading in February. Much the same trend is in evidence amongst both Remain and Leave voters; 82% of the former are now in favour, up two points on February, as are 71% of Leave voters, up four points. But this is far too thin a reed on which to read any claim that attitudes towards the shape of Brexit have softened.

Meanwhile, during the course of the Brexit process to date, two other key issues have arisen that were not covered by our previous rounds of interviewing. The first is whether the UK should be bound to accept future judgements of the European Court of Justice (ECJ), for example, in respect of the UK's participation in the single market post-Brexit or in resolving any dispute over the rights of EU citizens still living in the UK after the UK is no longer a member. The UK government has indicated that it does not believe that ECJ decisions made after the UK has left the EU should hold sway in the UK, and this is widely regarded as one of the UK's 'red lines' in the Brexit negotiations (May, 2017).

However, important though it is, this is not an easy issue to include in a survey of the general public. The European Court of Justice is a little known and little understood body. But the principle that the UK should not have to follow the rulings of a 'foreign' court is central to the arguments that have been made about the impact of EU membership on the UK's sovereignty. At the same time, it has been argued that any trade deal between the UK and the EU may require the UK to adhere to some of the regulations of the EU single market and will certainly have to accept some form of arbitration, while the EU has been arguing in the negotiations that EU citizens living in the UK after Brexit should have access to the ECJ if they feel that their rights are not being upheld (European Commission, 2017). Given these various considerations, we addressed the issue by asking the following question:

> **Some people say that, once Britain has left the EU, it should not have to follow any judgements made by a European Union court. Others disagree, and say that Britain should still be willing to follow some or all European Union court judgements. Which of the following statements comes closest to your view?**
>
> Britain should follow all EU court judgements, just as it does now
>
> Britain should follow some EU court judgements, such as those about any future trade agreement with the EU or the rights of EU citizens living in Britain
>
> Britain should not follow any EU court judgements at all

Our results suggest that the issue may not be a key 'red line' for many members of the general public (but see also Carl, 2017). True only 14% feel that the UK should follow all judgements of a 'European Union court'. But at the same time, a little less than one in three (31%) feel that the UK should not adhere to any decisions of such a court. Rather more than a half (55%) say that Britain should be willing to follow some court judgements. Even amongst those who voted to Leave, only around half (51%) say that the UK should not follow any European judgements, while 45% believe that it should be willing to follow some (though only 3% reckon it should have to follow all of them). At the same time, however, only 22% of Remain voters think that all European court judgements should be followed; most (64%) believe only some should be followed, while just 13% feel that none should be. It would appear that the UK government may be able to agree a compromise on the question of ECJ jurisdiction without necessarily incurring much in the way of an adverse public reaction.

Meanwhile, one of the three main issues in the first phase of the negotiations between the UK and the EU has been what the rights of EU citizens living in the UK should be after Brexit, and thus, by extension, the rights of UK citizens living in the UK. In our interviewing a year ago, we ascertained that there was considerable support for the idea that EU citizens already living in the UK should be able to remain in the UK if they wished. No less than 76% said that they were in favour of this proposition. However, this still left the question of exactly to whom this right should automatically extend. In practice, the UK government has proposed that anyone who was living in the UK as of a 'specified date' (which might well be the date of the UK's withdrawal) should be able to stay, and that any EU citizen who has already lived in the UK for 5 years (or who eventually has done so) will be able to apply for 'settled status' and thus have a permanent right to remain (Home Office, 2017).

We addressed this issue in our July survey by asking the following questions

> **When Britain leaves the EU, should someone from an EU country who has children living in Britain be allowed to stay or not?**
>
> **And what about someone from an EU country who has lived and worked in Britain for at least five years?**

The first of these might be regarded as a rather more liberal proposal than that put forward by the UK government, as it implies that any EU citizen with a child living in the UK should be allowed to stay, irrespective of how long the EU citizen has been resident in the UK. The second question is intended to capture attitudes towards the proposal put forward by the UK government.

Table 10 reveals that there appears to be considerable support for giving the right to stay to any EU citizen who has lived and worked in the UK for at least five years – well over a half (56%) say they should 'definitely' be allowed to stay. Even amongst Leave voters, approaching half (46%) take that view, while most of the remainder said they 'probably' should be allowed to remain. In contrast, there is slightly greater equivocation about the position of an EU citizen with children living in the UK. Although nearly nine in ten said they should either 'probably' or 'definitely' be allowed to stay, as many replied 'probably' as 'definitely'. It seems that, as far as most voters are concerned, the UK government has for the most part put forward an acceptable proposal about the right of EU citizens to stay permanently in the UK.

**Table 10. Attitudes towards which EU citizens should be allowed to remain in the UK, July 2017**

| Be allowed to stay? | Children Living in Britain | Lived in Britain for 5 years |
|---|---|---|
| | % | % |
| Definitely should | 43 | 56 |
| Probably should | 44 | 36 |
| Probably should not | 9 | 6 |
| Definitely should not | 3 | 2 |

## THE TRADE-OFF

So far, we have found little evidence that the increased pessimism about the outcome of the Brexit negotiations has had much impact on the kind of Brexit that voters would like to see implemented. However, we have so far only examined attitudes towards certain specific potential features of the Brexit deal. It is possible that while voters have not changed their views about what they would ideally like to see emerge from the agreement, their views about the relative priority of what it might include has altered. Perhaps the greater pessimism about the outcome of the Brexit negotiations means that voters, and especially Leave voters, are now more likely to back a 'soft' Brexit. That, for example, might mean that there is now greater support for the view that maintaining access to the EU's single market is more important than securing control of immigration.

As in previous waves of interviewing, our two most recent surveys addressed this issue by asking the following question:

> **It has been argued that when Britain leaves the EU, British firms will only be allowed to continue to sell goods and services freely to people in the EU if people from the EU are still free to come here to live and work. Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?**
>
> Definitely should allow people from the EU to come here freely to live and work
>
> Probably should allow people from the EU to come here freely to live and work
>
> Probably should not allow people from the EU to come here freely to live and work
>
> Definitely should not allow people from the EU to come here freely to live and work

Table 11 shows that the pattern of responses to this question has not been straightforward. Our interviewing in July suggested that there had indeed been a sharp change of outlook. Nearly two-thirds said that the UK should 'definitely' or 'probably allow people from the EU to come here freely to live and work' in return for free trade with the EU. In contrast, only half had been of that view when we first asked the question in the autumn of 2016. Moreover, most of the increase in support for this view occurred between February and July 2017 and thus coincided with the increase in pessimism about the outcome and handling of the EU negotiations.

**Table 11 Willingness to Allow Freedom of Movement in Return for Free Trade, Sept. 2016 to Oct, 2017.**

| | Sept 2016 | Feb. 2017 | July 2017 | Oct. 2017 |
|---|---|---|---|---|
| | % | % | % | % |
| Definitely should | 21 | 22 | 30 | 23 |
| Probably should | 28 | 32 | 34 | 31 |
| *All 'should'* | *49* | *54* | *63* | *53* |
| Probably should not | 29 | 24 | 23 | 27 |
| Definitely should not | 22 | 20 | 12 | 20 |
| *All 'should not'* | *51* | *45* | *35* | *47* |

However, the table also shows that that apparent shift in July has not been maintained. Rather the balance of opinion once again looks much like it did in February, with just slightly more saying that the UK either 'definitely' or 'probably' should strike such a deal than saying it 'definitely' or 'probably' should not. One possible explanation for the very different set of figures in July is that the question was asked in a different place on the survey. In that wave, the question was asked immediately after the two questions (see Table 1 above) about the implications of Brexit for immigration and the economy. In all the other waves, it was asked later in the questionnaire, after a set of questions about what specifically people wanted to emerge from the negotiations. It may be that the positioning of the question on the July survey, immediately after a question on the economic consequences of Brexit, resulted in more respondents giving priority to access to the single market.[1] If so, then it may well be the case that opinion on the subject has in fact been quite stable throughout the course of the last year.

[1] That said, it is not the case that the increase between February and July in the proportion who said that the UK should either definitely or probably allow freedom of movement occurred wholly or primarily amongst those who thought the economy would be worse off as a result of Brexit – as we might have anticipated if the order of the questions had ensured that the economic consequences of Brexit had greater salience when respondents were answering our question about the trade-off between access to the single market and controlling immigration. At most there is some indication that the relationship between evaluations of the economic consequences of Brexit and saying that the UK 'definitely should' or 'definitely should not' allow freedom of movement was rather stronger in July than in either February or October.

Meanwhile, there is certainly no clear evidence that those who voted Leave in the referendum have particularly changed their minds about the relative merits of a 'hard' versus a 'soft' Brexit. Rather, as Table 12 shows, at 68%, the proportion of Leave voters who think the UK should 'definitely' or 'probably' be willing to concede freedom of movement in return for free trade is little different from the 70% who were of that view a year ago. Such decline in the proportion who hold that view as has occurred has been mostly amongst Remain voters. In short, there is again little sign that the increased pessimism about the handling and the outcome of the Brexit talks has changed voters' minds about what the conclusion to those talks should be.

**Table 12 Willingness to Allow Freedom of Movement in Return for Free Trade by EU Referendum Vote, Sept. 2016 to Oct, 2017.**

| | Remain Voters | | | | Leave Voters | | | |
|---|---|---|---|---|---|---|---|---|
| | **Sept** | **Feb** | **July** | **Oct** | **Sept** | **Feb** | **July** | **Oct** |
| | % | % | % | % | % | % | % | % |
| Definitely | 34 | 37 | 48 | 39 | 10 | 9 | 11 | 7 |
| Probably | 36 | 37 | 36 | 37 | 20 | 27 | 32 | 25 |
| Probably not | 21 | 18 | 12 | 17 | 34 | 28 | 23 | 34 |
| Definitely not | 8 | 6 | 3 | 6 | 36 | 36 | 33 | 34 |

## VOTING IN A REPEAT REFERENDUM

Still, we might feel that the key test of whether voters' attitudes have shifted in response to the progress of the EU negotiations so far is not whether they have changed their minds about what kind of Brexit the UK should be seeking, but rather whether they have altered their opinion about the wisdom of leaving the EU at all. In order to keep track of whether the public mood on Brexit has changed or not, in each of our last four surveys we have asked the following:

> **Since the EU referendum, some people have changed their minds about how they would vote, while others have not.**
>
> **If you were given the chance to vote again, how would you vote – to remain a member of the European Union, to leave the European Union, or would you not vote?**

As Table 13 shows, if a repeat referendum were to be held now then 53% of those who say they would participate indicate that they would vote Remain, while 47% state that they would vote Leave. At first glance, that suggests the outcome of another referendum might well be decisively different from the outcome in June 2016, albeit that the country would still be almost evenly divided down the middle. However, before we come to the conclusion that there has then been an important shift in the balance of opinion on EU membership, we should also note that the proportion who now say that they will vote Remain is exactly the same as it was in our first reading a year ago, even though, at 51%, the reported level of support for Remain is two points higher than it was then. So, at most what the latest survey suggests is that there might have been a two point swing in favour of Remain since the EU referendum, but, if so, there is no evidence that that swing has increased in the wake of the increased pessimism about the handling and outcome of the EU negotiations. Indeed, it may well be too small for a repeat referendum to produce a different majority result from that in June 2016.[2]

**Table 13 Hypothetical Repeat Referendum Vote and Reported Referendum Vote, Sept. 2016-Oct. 2017.**

| | Sept 2016 | Feb. 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| | % | % | % | % |
| **Hypothetical Repeat Referendum Vote** | | | | |
| Remain | 53 | 52 | 55 | 53 |
| Leave | 47 | 48 | 45 | 47 |
| **Reported Referendum Vote 2016** | | | | |
| Remain | 49 | 50 | 51 | 51 |
| Leave | 51 | 50 | 49 | 49 |

Those who said they would not vote/did not vote are excluded from the denominator on which these figures are calculated.

[2] We should also note that most of the swing since June 2016 reflects reported differential abstention/turnout rather than voters changing their mind. Amongst those who voted Leave in 2016, 6% say that they would not vote again, whereas only 1% of Remain voters give the same response. Meanwhile, amongst those who did not vote in 2016, 48% say they would now vote Remain, while only 28% state that they would vote Leave. If we confine our attention to those who voted in 2016 and now give a vote intention, the proportion of Leave voters who say they would vote the same way (90%) is little different from the proportion of Remain voters who claim that they would vote the same way (91%). Previous research has suggested that Leave supporters were more likely than backers of Remain to vote in the June 2016 referendum and our evidence suggests that the outcome of any repeat referendum might well turn on whether that pattern were or were not to be repeated (Swales, 2016).

## CONCLUSION

One strand of comment that has been common amongst those who oppose Britain's withdrawal from the EU is that when the alleged difficulties and consequences of Brexit become clear to voters they will come to regret the decision to Leave – or at least will wish to sue for a soft Brexit. The experience of the last six months suggests this logic may be faulty. Voters, including not least those who voted to Leave, have become more pessimistic about the perceived economic consequences of Brexit and of how good a deal the UK will be able to secure, while they have also lost much of the confidence that they had in the UK's handling of the Brexit negotiations. Nevertheless, we have failed to find any consistent evidence that the balance of opinion has shifted towards a softer Brexit, let alone become more inclined to favour staying in the EU. Such changes of attitude as we have uncovered (and they are not large) appear to have predated the increased pessimism of recent months.

Rather than coming to the conclusion that the progress of the Brexit process so far means they came to the wrong decision about the EU, it seems that Leave voters are inclined to the view that those responsible for the process – including the EU as well as the UK government – are (from their perspective) failing to make progress towards the kind of future arrangement that they would largely still like to see. In short, they blame the actors in the Brexit process not the act of leaving itself. If the talks about Brexit continue to be difficult and if the economy does indeed begin to suffer, we should not presume that voters in Britain will change their minds about the merits of Brexit. Rather they may simply blame politicians - on both sides of the channel – for their apparent failure to deliver what those who voted for Leave have all along said they want.

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# APPENDIX

## Appendix table A:1 Impact of leaving EU on immigration

| Base: *all adults* | June 2016 | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|---|
| **From what you have seen and heard so far, do you think that as a result of leaving the EU immigration to Britain will be higher, lower, or won't it make much difference?** | % | % | % | % | % |
| A lot higher | 3 | 3 | 2 | 4 | 2 |
| A little higher | 4 | 4 | 5 | 6 | 4 |
| Won't make much difference | 28 | 53 | 48 | 52 | 50 |
| A little lower | 36 | 27 | 32 | 30 | 34 |
| A lot lower | 28 | 11 | 11 | 8 | 9 |
| *Bases* | *1632* | *1391* | *2322* | *2184* | *2168* |

## Appendix table A:2 Impact of leaving EU on economy

| Base: *all adults* | June 2016 | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|---|
| **And from what you have seen and heard so far, do you think that as a result of leaving the EU Britain's economy will be better off, worse off, or won't it make much difference?** | % | % | % | % | % |
| A lot better off | 11 | 11 | 11 | 9 | 10 |
| A little better off | 18 | 19 | 18 | 15 | 16 |
| Won't make much difference | 29 | 25 | 23 | 26 | 22 |
| A little worse off | 24 | 28 | 29 | 28 | 32 |
| A lot worse off | 15 | 17 | 17 | 21 | 21 |
| *Bases* | *1632* | *1391* | *2322* | *2184* | *2168* |

## Appendix table A:3 How good or bad a deal Britain will eventually get out of the Brexit negotiations

| Base: *all adults* | February 2017 | July 2017 | October 2017 |
|---|---|---|---|
| **How good or bad a deal do you think Britain will eventually get out of the Brexit negotiations with the EU?** | % | % | % |
| Very good deal | 4 | 2 | 2 |
| Fairly good deal | 28 | 23 | 18 |
| Neither a good nor a bad deal | 27 | 29 | 28 |
| Fairly bad deal | 30 | 35 | 40 |
| Very bad deal | 7 | 9 | 12 |
| *Bases* | *2322* | *2184* | *2168* |

## Appendix table A:4 Whether UK government is handling Britain's exit from the EU well or badly

| Base: *all adults* | February 2017 | July 2017 | October 2017 |
|---|---|---|---|
| **From what you have seen and heard so far, would you say that the UK government is handling Britain's exit from the EU well or badly?** | % | % | % |
| Very well | 5 | 2 | 2 |
| Fairly well | 23 | 17 | 14 |
| Neither well nor badly | 28 | 25 | 24 |
| Fairly badly | 21 | 31 | 34 |
| Very badly | 20 | 23 | 27 |
| *Bases* | *2322* | *2184* | *2168* |

## Appendix table A:5 Whether EU government is handling Britain's exit from the EU well or badly

| Base: *all adults* | February 2017 | July 2017 | October 2017 |
|---|---|---|---|
| **And from what you have seen and heard so far, would you say that the EU is handling Britain's exit from the EU well or badly?** | % | % | % |
| Very well | 2 | 3 | 3 |
| Fairly well | 15 | 18 | 14 |
| Neither well nor badly | 25 | 31 | 25 |
| Fairly badly | 29 | 29 | 34 |
| Very badly | 17 | 18 | 23 |
| *Bases* | *2322* | *2184* | *2168* |

## Appendix table A:6 Likelihood of free trade in EU agreement

| Base: *all adults* | July 2017 | October 2017 |
|---|---|---|
| **And from what you have heard and seen so far how likely or unlikely do you think it is that the agreement will allow companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU?** | % | % |
| Very likely | 14 | 10 |
| Quite likely | 45 | 40 |
| Neither likely nor unlikely | 19 | 21 |
| Quite unlikely | 18 | 22 |
| Very unlikely | 2 | 6 |
| *Bases* | *2184* | *2168* |

## Appendix table A:7 Likelihood of immigration control in EU agreement

| Base: *all adults* | July 2017 | October 2017 |
|---|---|---|
| **And from what you have heard and seen so far – and leaving aside whether you would like it included or not - how likely or unlikely do you think it is that the agreement will require people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU?** | % | % |
| Very likely | 12 | 11 |
| Quite likely | 46 | 39 |
| Neither likely nor unlikely | 22 | 19 |
| Quite unlikely | 20 | 25 |
| Very unlikely | 4 | 4 |
| *Bases* | *2184* | *2168* |

## Appendix table A:8 Likelihood of mobile phone regulations in EU agreement

| Base: *all adults* | October 2017 |
|---|---|
| **And from what you have heard and seen so far how likely or unlikely do you think it is that the agreement will require British mobile phone companies to follow EU regulations that limit what they can charge customers for calls made abroad?** | % |
| Very likely | 9 |
| Quite likely | 34 |
| Neither likely nor unlikely | 29 |
| Quite unlikely | 18 |
| Very unlikely | 7 |
| *Bases* | *2168* |

## Appendix table A:9 In favour or against free trade

| Base: *all adults* | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| **Now, what about allowing companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU. To what extent would you be in favour or against that being part of the agreement?** | % | % | % | % |
| Strongly in favour | 65 | 61 | 57 | 57 |
| Somewhat in favour | 25 | 27 | 31 | 31 |
| Neither in favour nor against | 8 | 9 | 10 | 9 |
| Somewhat against | 1 | 2 | 1 | 2 |
| Strongly against | 1 | 1 | 1 | 1 |
| *Bases* | *1391* | *2322* | *2184* | *2168* |

## Appendix table A:10 In favour or against freedom of movement

| Base: *all adults* | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| **Following the decision to leave the European Union, the UK will have to negotiate a new agreement with the EU. The next few questions are about some things that could be included in that agreement.**<br>**First of all, requiring people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU. Would you be in favour or against that being part of the agreement?** | % | % | % | % |
| Strongly in favour | 47 | 38 | 33 | 30 |
| Somewhat in favour | 27 | 30 | 35 | 34 |
| Neither in favour nor against | 12 | 16 | 14 | 15 |
| Somewhat against | 7 | 8 | 10 | 12 |
| Strongly against | 6 | 7 | 7 | 7 |
| *Bases* | *1391* | *2322* | *2184* | *2168* |

## Appendix table A:11 In favour or against UK taxing EU goods and EU taxing UK goods

| Base: *all adults* | **October 2017** |
| --- | --- |
| **Finally, what about allowing Britain to put a tax on goods imported from the EU, while allowing the EU to put a tax on goods imported from Britain? To what extent would you be in favour or against that being part of the agreement?** | % |
| Strongly in favour | 5 |
| Somewhat in favour | 18 |
| Neither in favour nor against | 26 |
| Somewhat against | 27 |
| Strongly against | 22 |
| *Bases* | *2168* |

## Appendix table A:12 In favour or against mobile phone regulations

| Base: *all adults* | **October 2017** |
| --- | --- |
| **What about requiring British mobile phone companies to follow EU regulations that limit what they can charge customers for calls made abroad? To what extent would you be in favour or against that being part of the agreement?** | % |
| Strongly in favour | 48 |
| Somewhat in favour | 26 |
| Neither in favour nor against | 17 |
| Somewhat against | 5 |
| Strongly against | 4 |
| *Bases* | *2168* |

## Appendix table A:13 Should Britain follow EU court judgements

| Base: *all adults* | **October 2017** |
|---|---|
| **Some people say that, once Britain has left the EU, it should not have to follow any judgements made by a European Union court. Others disagree, and say that Britain should still be willing to follow some or all European Union court judgements. Which of the following statements comes closest to your view?** | % |
| Britain should follow all EU court judgements, just as it does now | 14 |
| Britain should follow some EU court judgements | 55 |
| Britain should not follow any EU court judgements at all | 31 |
| *Bases* | *2168* |

## Appendix table A:14 EU national with child allowed to stay

| Base: *all adults* | **July 2017** |
|---|---|
| **When Britain leaves the EU, should someone from an EU country who has children living in Britain be allowed to stay or not?** | % |
| Definitely should be allowed to stay | 43 |
| Probably should be allowed to stay | 44 |
| Probably should not be allowed to stay | 9 |
| Definitely should not be allowed to stay | 3 |
| *Bases* | *2184* |

## Appendix table A:15 EU national worked in Britain for 5 years allowed to stay

| Base: *all adults* | **July 2017** |
|---|---|
| **And what about someone from an EU country who has lived and worked in Britain for at least five years?** | % |
| Definitely should be allowed to stay | 72 |
| Probably should be allowed to stay | 25 |
| Probably should not be allowed to stay | 3 |
| Definitely should not be allowed to stay | 1 |
| *Bases* | *2184* |

## Appendix table A:16 Free trade or freedom of movement

| Base: *all adults* | **Sept 2016** | **Feb 2017** | **July 2017** | **Oct 2017** |
|---|---|---|---|---|
| **It has been argued that when Britain leaves the EU, British firms will only be allowed to continue to sell goods and services freely to people in the EU if people from the EU are still free to come here to live and work.** **Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?** | % | % | % | % |
| Strongly in favour | 21 | 22 | 30 | 23 |
| Somewhat in favour | 28 | 32 | 34 | 31 |
| Neither in favour nor against | 29 | 24 | 23 | 27 |
| Somewhat against | 22 | 20 | 12 | 20 |
| *Bases* | *1391* | *2322* | *2184* | *2168* |

## Appendix table A:17 Hypothetical repeat referendum vote

| Base: *all adults* | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| **Since the EU referendum, some people have changed their minds about how they would vote, while others have not.** **If you were given the chance to vote again, how would you vote – to remain a member of the European Union, to leave the European Union, or would you not vote?** | % | % | % | % |
| Remain | 53 | 52 | 55 | 53 |
| Leave | 47 | 48 | 45 | 47 |
| *Bases* | *1391* | *2322* | *2184* | *2168* |

Those who said they would not vote/did not vote are excluded from the denominator on which these figures are calculated.

## Appendix table A:18 Reported 2016 EU referendum vote

| Base: *all adults* | Sept 2016 | Feb 2017 | July 2017 | Oct 2017 |
|---|---|---|---|---|
| **In the referendum, you were asked 'Should the United Kingdom remain a member of the European Union or leave the European Union?'** **Did you vote to 'remain a member of the EU' or to 'leave the EU'?** | % | % | % | % |
| Remain | 49 | 50 | 51 | 51 |
| Leave | 51 | 50 | 49 | 49 |
| *Bases* | *1391* | *2322* | *2184* | *2168* |

Those who said they did not vote are excluded from the denominator on which these figures are calculated.

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