

HAVE THE POLITICIANS DELIVERED? VOTERS' JUDGEMENT ON THE BREXIT PROCESS

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The UK has decided to leave the EU, thanks to a vote in a referendum held in June 2016 in which 52% backed leaving, while only 48% said that they wanted to remain. During the last two years, the UK and the EU have endeavoured to give effect to that vote. To date, they have negotiated both a treaty that defines the terms and conditions under which the UK would leave and an agreement that outlines what the UK's future relationship with the EU might be. These, the fruits of the first phase of a two-phase process, were unveiled in November and since then have been the subject of intense debate about whether the 'deal' should be accepted or not. This is therefore an appropriate moment at which to assess how public attitudes towards Brexit have evolved during this process and to ascertain what judgement they have reached about what the negotiations have so far achieved. In particular, it is time to ask whether voters – and especially those who voted Leave – feel that the process that has been undertaken with a view to implementing their instructions has been a success or a failure.

Our evidence comes from six waves of survey research that have been conducted using NatCen's random probability mixed mode panel (Jessop, 2018). The first five waves, the findings of which have been reported previously (Curtice, 2016; 2017a; 2017b; 2018a; 2018b), were conducted in September 2016, February, July and October 2017, and June 2018. The initial waves focused in particular on what voters felt should be included in the Brexit deal, while subsequently more attention has been paid to how the Brexit process was being handled and what voters thought the consequences of leaving would be. In this report, we focus on the findings of the latest wave of interviewing, which was conducted between 24 January and 17 February 2019, that is, after the House of Commons initially voted against acceptance of the deal. During this period, we interviewed either online or by telephone 2,654 people, representing 57% of those who were invited to complete the questionnaire. All the respondents are people who were originally selected (at random) and subsequently interviewed as part of the fieldwork for a previous British Social Attitudes survey, and who then have agreed to undertake short follow-up interviews.

We begin by looking at the trends in what people hoped would emerge from the Brexit process. We then turn to how people view how the Brexit negotiations have been conducted and what they make of the outcome. Thereafter we examine what people think the consequences of leaving the EU would be, before concluding by examining what impact the last two years may have had on their views about the merits of leaving the EU in the first place.

HOPES

Two issues were of particular importance during the EU referendum campaign, and have continued to be so ever since – the impact of leaving or remaining in the EU on (a) Britain’s economy, and (b) immigration (Clarke et al. 2017, Curtice, 2017c). Those who advocated a Remain vote argued in particular that the UK needed to secure continued access to the EU’s single market, as the ease of cross-border trading that this facilitated was highly beneficial for the UK economy. Those who argued for a Leave vote suggested that, following its recent experience of relatively high levels of net inward migration (Vargos-Silva, 2018), the UK should no longer be willing to sign up to the ‘freedom of movement’ provisions of the EU, which give any EU citizen the right to live and work in any other EU country.

In truth, throughout the Brexit process both arguments have appeared persuasive to many voters. In each wave of our surveys we have asked people whether they were in favour or against the following provisions being part of the final 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?

The first of these is intended to tap people’s support for the broad principle behind the single market, while the second is a proposition that effectively implies that the UK should no longer maintain freedom of movement.

Table 1 Attitudes towards Free Trade and EU Migration, Sept 2016-Feb 2019

	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Free Trade	%	%	%	%	%	%
In favour	90	88	87	88	86	84
Neither	8	9	10	9	10	11
Against	2	3	2	3	3	4
Treat EU Migrants Like Non-EU	%	%	%	%	%	%
In favour	74	68	68	64	59	59
Neither	12	16	14	15	20	20
Against	13	15	17	20	20	20

As Table 1 shows, there have always been substantial majorities in favour of both propositions. Indeed, there would appear to be almost a consensus in favour of the principle of free trade. Although support is a little higher among those who voted Remain in 2016 (92%), it is still the case that the overwhelming majority of Leave supporters (84%) also endorse the idea. Meanwhile, although there is some evidence that support for treating EU migrants like non-EU migrants has fallen – albeit that trend appears to have stalled most recently - it is still the case that nearly three-fifths support that proposition. And, although, as one might anticipate, Leave supporters (80%) are more likely to be in favour than Remain voters (46%), even so it appears that, more than two years after the EU referendum, nearly a half of Remain voters endorse one of the central propositions of the Leave campaign. One can see why the Prime Minister came to the conclusion that ending freedom of movement should be a red line in the negotiations with the EU.

So, if any Brexit deal was to satisfy the requirements of most voters, it would appear necessary for it to embrace both free trade, as provided for by the single market, and freedom of movement. Back in September 2016 over two-thirds of our respondents (69%) said they were in favour of both free trade and of ending freedom of movement. However, the EU takes the view that freedom of movement is one of the essential features of its single market and that, consequently, a country cannot be a member without also accepting freedom of movement (European Parliament, 2017). Yet after more than two and a half years of discussion and negotiations, it appears that many voters still do not accept that this trade-off has to exist. As many as 53% still say that they are in favour of both having free trade and ending freedom of movement.

Given that this is the case, however, one might wonder whether voters are necessarily signed up to some of the other implications of free trade, such as the fact that it stops a country being able to use tariffs on imported goods as a way of protecting its domestic industry. To check whether that is the case, in our more recent surveys we have also put to respondents another proposal as to what might be included in the final agreement between the UK and the EU. This read as follows:

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?

Table 2 Attitudes towards Tariffs between the UK and the EU, October 2017-Feb 2019

	Oct 17	June 18	Feb 19
UK/EU Tariffs	%	%	%
In favour	24	22	24
Neither	26	30	28
Against	49	48	46

This question has consistently suggested a somewhat more nuanced picture, with nearly a quarter of all voters (and 33% of Leave voters) saying that they would be in favour of Britain being allowed to impose tariffs on goods imported from the EU (see Table 2). That said, opponents outnumber supporters of the proposition by almost two to one, suggesting that the balance of opinion at least is still in favour of maintaining free trade with the EU. Meanwhile, even on this stricter measure of free trade we find that as many as 52% of those who are

against the introduction of tariffs also say that they are in favour treating EU-migrants like their non-EU counterparts.

So, one of the persistent challenges facing the UK government in the Brexit negotiations is that many voters' ideal Brexit – on both sides of the Remain/Leave divide - is one that was unattainable. That said, many voters do have a preference so far as the relative merits of being in the single market and maintaining free trade are concerned. This has been apparent from the outset when we have asked voters 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

It will be noted that this way of addressing the issue assumes that most voters regard free trade as being desirable, an assumption that we have seen has largely proven to be valid.

Table 3 Willingness to Allow Freedom of Movement in Return for Free Trade, Sept. 2016 to Feb. 2019.

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?

	Sept 16	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%	%
Definitely should	21	22	30	23	28	27
Probably should	28	32	34	31	32	32
<i>All 'should'</i>	49	54	63	53	60	59
Probably should not	29	24	23	27	23	22
Definitely should not	22	20	12	20	16	17
<i>All 'should not'</i>	51	45	35	47	39	40

Table 3 reveals that in the months immediately after the referendum, opinion appeared to be more or less evenly divided on whether the UK should or should not be willing to maintain freedom of movement in order to retain free trade. However, since then on balance opinion has tended to favour, albeit to varying degrees, striking such a deal. Our two most recent readings both suggest that, as the initial phase of the Brexit negotiations have moved towards a conclusion, around three in five are inclined to favour such a deal, while two in five are not. Such a trend is, of course, consistent with the fact that voters' support for treating EU migrants no more favourably than their non-EU counterparts has fallen somewhat. That said, we should also note that many voters are seemingly not dogmatic about this issue, with just over half (54%), saying 'probably should' or 'probably should not', rather than being 'definitely' in favour of one course of action or the other.

However, what perhaps is more important about the question is that, when forced to choose in this way, the relative similarity of Remain and Leave voters' attitudes towards free trade and migration disappears. Rather, as Table 4 shows, the two groups are inclined towards diametrically opposite views. In the autumn of 2016, seven in ten Remain voters (70%) felt that the UK either definitely or probably should allow freedom of movement in return for free trade, while seven in ten Leave voters (70%) took the opposite view. Since then public opinion in both groups has moved in favour of striking such a deal, but even so, the gap between the two groups remains much as it was. Thus, while around three-quarters of Remain voters (77%) think that allowing freedom of movement is a fair price to pay for securing free trade, around three in five Leave voters (61%) are opposed to such a step.

Table 4 Willingness to Allow Freedom of Movement in Return for Free Trade by EU Referendum Vote, Sept. 2016 to Feb. 2019.

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?

Voted Remain 2016	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%	%
Definitely should	34	37	48	39	42	42
Probably should	36	37	38	37	36	35
Probably should not	21	18	11	17	16	15
Definitely should not	8	6	2	6	6	6
Voted Leave 2016	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%	%
Definitely should	10	9	13	7	11	13
Probably should	20	27	32	25	27	25
Probably should not	34	28	31	34	30	28
Definitely should not	36	36	23	34	30	33

In short, once voters are required to choose between remaining in the single market and ending freedom of movement, opinion divides much more sharply between Remain and Leave supporters than is the case when they are simply requested to consider each element of Britain's relationship with the EU separately. Thus, the limitation on the options that were available to the UK in negotiating its future relationship with the EU meant that it would be difficult for it to emerge with a deal that would be able to bridge the divide between Remain and Leaver voters.

PROCESS

In the event, it has indeed proven difficult to satisfy most voters. As the Brexit negotiations have proceeded, so voters have become increasingly critical of how the process has been handled. However, contrary to what might have been expected, given the difference in their priorities for what should be included in the Brexit deal, in some respects Remain and Leave voters have come to be united in their criticism of the handling of the Brexit process.

There have, of course, been two sides to the Brexit negotiations, the UK government and the EU. Thus, in order to secure a rounded picture of how well voters feel the process has been conducted, we have tracked both how well voters think that the UK has been handling Britain's exit from the EU and how well they feel that the EU has been doing so. Neither side started off the talks in voters' eyes with a strong reputation (see Table 5). In both cases, more voters felt that they were handling Britain's withdrawal badly than reckoned they were doing so well. That said, voters were rather more inclined to give the UK government the benefit of the doubt than they were the EU. Two years ago, just 17% thought that the EU was handling Brexit well, whereas as many as 29% felt that the UK government was doing so.

Table 5 Perceptions of How Well/Badly the UK and the EU Have Handled Brexit, February 2017-February 2019

	Feb 17	July 17	Oct 17	June 18	Feb 19
UK Government	%	%	%	%	%
Well	29	19	15	13	7
Neither Well Nor Badly	28	25	24	22	11
Badly	41	55	61	64	81
The EU	%	%	%	%	%
Well	17	21	17	16	16
Neither Well Nor Badly	35	31	25	25	22
Badly	46	47	57	57	61

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?*

That, however, is no longer the case. While voters have gradually become more and more critical of both institutions' handling of Brexit, it is the UK government above all that has come in for increasing criticism. Now, no less than 81% of all voters say that the UK government has been handling Brexit badly, while just 7% believe it is doing so well. In contrast, the proportion who think that the EU has been handling the UK's withdrawal badly is, although 15 points higher than February 2017, now discernibly lower (61%) than the equivalent figure (81%) for the UK government. It might be regarded as quite remarkable that voters in Britain are now more critical of the institution that is meant to be pursuing their instructions to leave the EU, than they are of the institution from which they voted to leave just two and a half years ago.

Table 6 Perceptions of How Well/Badly the EU have Handled Brexit by EU Referendum Vote, February 2017-February 2019

Voted Remain 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%
Well	17	26	22	22	24
Neither Well Nor Badly	38	33	27	29	26
Badly	42	38	50	49	49
Voted Leave 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%
Well	16	15	10	11	8
Neither Well Nor Badly	28	28	19	18	12
Badly	55	56	71	69	79

However, the patterns underlying these two trends are different from each other. It should, perhaps, come as little surprise, as Table 6 shows, that when the negotiations started, those who voted Leave were more critical than Remain supporters of how the EU was handling Brexit. Over half (55%) of Leave voters at that stage thought that the EU was dealing badly with Brexit, compared with just over two in five (42%) of Remain supporters – though the balance of opinion among Remain voters was still tilted towards being critical rather than being impressed by the EU's role. Nevertheless, this gap has widened during the course of the Brexit process. Among Remain voters the balance of opinion towards the EU's performance is the same now as it was two years ago. True, the proportion who think the EU is handing Brexit badly is seven points higher now than it was two years ago, but so also is the proportion who think it is dealing badly with Britain's withdrawal. Leave supporters, in contrast, are now much more critical than they were in February 2017. No less than 79% of them think the EU has handled Britain's exit from the EU badly. Unsurprisingly, Leave voters have not held back from blaming the EU for whatever disappointment they may feel about the way the Brexit process has been conducted.

Table 7 reveals, however, that the increase in criticism of the UK government's performance has been driven by a different pattern of movement. Here we can see that in February 2017 those who voted Remain were inclined to be critical of the UK government's handling of Brexit. More than twice as many of them felt that the UK government was handling the process badly (42%) as felt it was doing so well (18%) - presumably because some Remain supporters at least felt

that the government was wrong for pursuing Brexit in the first place. In contrast, at that point in time the balance of opinion among Leave voters was the other way around. Just over two in five of this group (42%) felt the UK was handling Brexit well, rather more than the 27% who believed it was dealing with the issue badly.

Relatively critical, as they already were in the first place, Remain supporters have become much more critical of the UK government. The proportion who believe it is handling Brexit badly has doubled to as much as 85%. Yet the increase in criticism of the government among Leave voters – the very voters whose mandate it has been trying to fulfil – has increased even more, and especially so during the last six months of the Brexit process (during which period not only were details of the ‘deal’ published but also the government’s Chequers agreement, which outlined a vision for the long-term relationship between the UK and the EU that was criticised by many advocates for Leave). Already by the summer of last year, a majority of Leave supporters (53%) felt that the UK government was handling Brexit badly. However, now it stands as high as 80%. As a result, Leave voters are almost as likely as Remain voters to be critical of the government’s handling of Britain’s withdrawal from the EU and are also just as likely to be critical of the UK government as they are of the EU.

Table 7 Perceptions of How Well/Badly the UK Government have Handled Brexit by EU Referendum Vote, February 2017-February 2019

Voted Remain 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%
Well	18	10	9	8	5
Neither Well Nor Badly	26	21	19	16	10
Badly	42	68	71	76	85
Voted Leave 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
	%	%	%	%	%
Well	42	28	21	21	10
Neither Well Nor Badly	29	32	28	24	9
Badly	27	39	50	53	80

It would appear then, that there is now widespread disenchantment among Leave voters with the way that the Brexit process has been handled. They are not simply unhappy with the way in which the EU has dealt with the issue, but they are also disappointed with the performance of their own government. If, as some have argued (Curtice, 2017d), part of the motivation behind the Leave vote was disenchantment with the existing political system, it is far from clear that the way in which Brexit has been perceived by them to have been handled so far will necessarily have helped reduce that disenchantment.

OUTCOME

Still, even if voters are unhappy with the way that Brexit has been handled, they might still be content with the outcome. We might expect, in particular, that whatever reservations they may have about how the process has been handled, Leave voters, at least, would still welcome the fact that an agreement has actually been reached. Certainly, if that is not the case, then it might be thought difficult to regard the Brexit process as having succeeded in delivering an outcome that has met the expectations of those who voted to leave the EU.

Yet there is little sign of satisfaction with the outcome. As Table 8 shows, so far as all voters are concerned, it would seem that what had been a growing mood of pessimism about what would eventually emerge from the negotiations has concluded with a decidedly negative evaluation of the deal that was eventually unveiled in November 2018. Just before the UK triggered the Article 50 process in March 2017, the public were almost evenly divided between those who anticipated that Britain would secure a good deal (33%) and those who anticipated that it would obtain a bad deal (37%). However, by the summer of last year expectations were already much lower. At that point, more than three times as many voters (57%) thought that the UK would obtain a bad deal as reckoned it would secure a good one (17%). But now that the first phase of the Brexit process has come to a conclusion and a deal unveiled, voters have become even more likely to feel that Britain is heading for a bad deal. No less than 63% hold that view, while just 6% express the contrary opinion.

Table 8 Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks, February 2017-February 2019

	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Britain to get a...	%	%	%	%	%
Good Deal	33	25	19	17	6
Neither Good Nor Bad	27	29	28	25	28
Bad Deal	37	44	52	57	63
Net: Good-Bad	-4	-19	-33	-40	-57

Between Feb. 2017 and June 2018 respondents were asked: *How good or bad a deal do you think Britain will eventually get out of the Brexit negotiations with the EU?* In February 2019 the text read: *How good or bad a deal do you think Britain has got out of the Brexit negotiations with the EU so far?*

But perhaps this trend is primarily a product of disgruntlement among those who voted Remain at the prospect of a Brexit that they regard as a sharper break in the UK's relationship with the EU than they had originally anticipated would occur. Yet for the most part this is not the case. Although at 64% the proportion who now think that the UK is heading for a bad deal is six points higher than it was in February 2017, it is actually eight points below the proportion who were of that view in the summer of 2018. In short, while Remain voters were relatively pessimistic from the outset about the kind of deal that the UK would obtain, they have not consistently become markedly more inclined to that view during the course of the Brexit process.

Table 9 Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks by EU Referendum Vote, February 2017-February 2019

Voted Remain 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Britain to get a...	%	%	%	%	%
Good Deal	17	12	11	9	6
Neither Good Nor Bad	25	24	20	18	28
Bad Deal	56	63	68	72	64
Voted Leave 2016	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Britain to get a...	%	%	%	%	%
Good Deal	50	39	27	26	6
Neither Good Nor Bad	27	33	33	33	25
Bad Deal	20	26	38	40	66

The same cannot be said of those who voted Leave. Two years ago, a half of this group (50%) expected the UK to secure a good deal while only one in five anticipated a bad one. But that relative optimism did not survive for long. By the end of 2017 it was already the case that more Leave supporters expected the UK to get a bad deal than obtain a good one. But now that the deal has been unveiled the mood among Leave voters has grown much darker. In our latest survey, no less than two-thirds (66%) of Leave supporters say that the UK is in the process of ending up with a bad deal, while 6% say it looks as though it will have a good one. As a result, Leave voters are now as pessimistic as Remain voters about the deal the UK has obtained so far in the Brexit negotiations. It appears that the outcome of the Brexit process has largely failed to satisfy the voters who voted for the principle of leaving the EU in the first place.

However, the fact that Remain and Leave voters are largely of one mind in their view of the deal does not necessarily mean that they share the same criticism of it. It might be the case, for example, that while Remain voters feel that the outcome of the Brexit process means that the UK is heading for too 'hard' a Brexit, Leave supporters are inclined to the view that the deal would result in too 'soft' a Brexit. In order to try and ascertain why Remain and Leave voters might be critical of the deal, in our most recent survey we asked the following question for the first time:

Would you say that the deal the UK has got out of the negotiations with the EU so far would mean that in future Britain's relationship with the EU would be...

- Much too close
- Somewhat too close
- About right
- Somewhat too distant
- Much too distant

Table 10 Perceptions of whether the Brexit Deal Would Result in Too Close or Too Distant a Relationship with the EU by EU Referendum Vote and by Perceptions of whether the Deal is Good or Bad, February 2019

Deal would mean UK's relationship with the EU would be:	Vote in 2016			Regard deal as bad and voted	
	All Voters	Remain	Leave	Remain	Leave
	%	%	%	%	%
Too close	20	9	39	10	47
About right	25	18	31	9	19
Too distant	51	70	26	79	30

Table 10 reveals that as many as a half of all voters (51%) think that the deal that the UK has negotiated so far would result in too distant a relationship with the EU. This is certainly the predominant view among Remain voters, 70% of whom think that the relationship would be too distant. This figure is even higher, 79%, among those Remain voters who think that the UK is heading for a bad deal. In contrast, the balance of opinion among Leave voters is in the opposite direction, though the views of this group are seemingly more fragmented than those of Remain supporters. While around two-fifths of Leave voters (39%) think that the relationship would be too close, around a quarter (26%) express the view that it would be too distant. Both views are even more in evidence among those Leave voters who think the deal is a bad one, though it is the perception that it would be too close, a view expressed by 47%, that is the more common position.

So, it appears that for the most part Remain and Leave voters criticise the deal from very different perspectives. Most of the former feel that it provides for too 'hard' a Brexit while Leave voters are inclined to the view that it would result in too 'soft' a withdrawal – though it appears that there is a minority of Leave voters who also regard the deal as too 'hard'. This adds to our earlier evidence that it was perhaps always going to be difficult to emerge with a deal that would satisfy both groups of voters. At the same time, it may be the case that the expectations of Leave voters were too heterogeneous for any deal to be likely to satisfy them all. But above all, it appears that the deal has come to be regarded as a compromise that leaves many voters on both sides of the Brexit debate feeling unsatisfied with the outcome of the Brexit process.

CONSEQUENCES

There are, of course, other possible reasons why voters might have come to the conclusion that the UK is on course to secure a bad deal from the Brexit negotiations. One is that the process may have led them to become more pessimistic about what the consequences of leaving the EU will be. They might have formed the view that leaving will not result in the reduction in immigration that many seemed to be seeking. Or, they might have reached the conclusion that perhaps the UK economy was more likely to suffer from withdrawal from the EU than they had previously anticipated.

Table 11 Expectations of the Consequences of Leaving the EU for the Level of Immigration, June 2016-February 2019

	Jun 16	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Brexit to mean immigration will be:	%	%	%	%	%	%	%
Higher	7	7	7	9	7	7	9
Not much difference	28	53	48	52	50	53	50
Lower	64	38	43	39	43	38	39
Net: Lower-Higher	+57	+31	+36	+30	+36	+31	+30

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-June 2018: *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 11 charts voters' expectations of the impact of leaving the EU on the level of immigration from shortly before the EU referendum (when respondents to the NatCen panel were interviewed about the then forthcoming vote. See Cabrera-Alvarez et al., 2016). As soon as the referendum was over far fewer voters (38%) felt immigration would be reduced as a result of leaving the EU than had been the case immediately beforehand (64%). Despite the prominence of the issue in the referendum campaign itself, at least a half of voters (53%) had apparently come to the conclusion that leaving would not make much difference either way to the level of immigration. However, since then there has been little sign of any significant change in the balance of opinion. Voters' perceptions of the consequences of leaving the EU for immigration have evidently been little affected by the Brexit negotiations.

Table 12 Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – February 2019

	Jun 16	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Brexit to mean economy will be:	%	%	%	%	%	%	%
Better Off	29	30	29	24	25	25	19
Not much difference	29	25	23	26	22	23	22
Worse Off	39	45	46	49	52	51	58
Net: Better Off – Worse Off	-10	-15	-17	-25	-27	-26	-39

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-June 2018: *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?*

The same cannot be said, however, of voters' perceptions of the economic consequences of leaving the EU. Even at the time of the referendum, rather more voters thought the economy would be worse off as a result of leaving the EU (39%) than anticipated it would be better off (29%). However, since then voters have slowly become a little more pessimistic. By the summer of 2017 nearly a half of voters had come to the conclusion that the economy would be worse off as a result of Britain's exit from the EU, while only around a quarter (24%) took the opposite view. But during the last six months there has been a further increase in economic pessimism. Now, around three times as many voters (58%) think that the economy will suffer as a result of Brexit than believe it will benefit (19%).

This increase in economic pessimism has occurred primarily among those who voted Leave. As we might anticipate, most of those who voted Remain have long been doubtful about the economic case for leaving the EU (see Table 13). Even in September 2016, around four in five (79%) of them said that the economy would be worse off after Brexit, and the position is little different now (83%). However, Leave voters were initially relatively optimistic about the economic consequences of leaving, with nearly three in five of them (58%) believing that the economy would be better off. But gradually that proportion has slipped, and now has reached a new low of around two in five (41%). True, optimists still clearly outnumber pessimists (25%) among this group, but it would appear that the Brexit process has to some degree served to undermine the confidence of some Leave supporters in the economic case for exiting the EU.

Table 13 Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – February 2019

Voted Remain 2016	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Brexit to mean economy will be:	%	%	%	%	%	%
Better Off	5	7	6	6	4	4
Not much difference	15	13	14	11	15	12
Worse Off	79	78	79	81	80	83
Voted Leave 2016	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Expect Brexit to mean economy will be:	%	%	%	%	%	%
Better Off	58	54	46	45	51	41
Not much difference	32	30	35	34	30	32
Worse Off	9	15	18	21	17	25

That said, the change in the balance of opinion among Leave voters on this issue has not been as dramatic as we have seen in respect of how good or bad a deal the UK was expected to secure. It certainly therefore cannot provide an adequate explanation of why. As the negotiations have proceeded, Leave voters have become so much more critical of the Brexit deal. Indeed, those Leave voters who now think that the UK is heading for a bad deal are not particularly likely to be pessimistic about the economic consequences of leaving. At 27% the proportion of them who think that the economy will be worse off is little different from the

proportion among Leave voters as a whole (26%). Meanwhile those Leave voters who think the UK is getting a bad deal are, if anything, slightly more likely (45%) than Leave voters as a whole (41%) to think that the economy will be better off. It would seem unwise to presume that Leave voters' doubts about the merits of the deal that has emerged from the Brexit negotiations are rooted in concerns about its perceived economic consequences.

DO VOTERS STILL WISH TO LEAVE?

However, perhaps the most important test to which the Brexit process should be subjected so far as how the public have reacted is concerned is whether the majority view that was registered in the ballot box in June 2016 is still the majority view after two years of Brexit negotiations.

At this point, though, we should enter a note of caution about our evidence. When we first conducted our surveys, the way in which our respondents said that they had voted in the EU referendum was little different from the actual outcome. In our September 2016 survey, for example, 49% said that they had voted Remain, while 51% indicated that they had backed Leave, figures that are only one point adrift of the actual outcome. However, the proportion who report having voted Remain has gradually increased during the course of the last two years, and in our most recent survey, 54% said they had voted Remain, while only 46% said that they had backed Leave. This apparent bias should be borne in mind in evaluating the implications of what our respondents say that they would do if another referendum were held now. At the same time, however, we should bear in mind that our survey has been relatively successful in attracting the participation of those who did not vote in the EU referendum. No less than a quarter of the respondents to our latest survey fall into this group, only a little below the official abstention rate of 29% in the referendum itself. As we shall see, this group is an important one.

In Table 14 we have extrapolated from our survey data the hypothetical outcome of a referendum in which people were invited once again to vote in response to the question that appeared on the ballot paper in June 2016, that is, 'Should the UK remain a member of the European Union or leave the European Union?'. For each survey the estimate has been calculated by applying to the actual outcome of the referendum in June 2016 the difference between the proportion of our sample who said that they voted Remain and Leave in 2016 and the proportion who indicated they would do so in a second ballot.

It will be seen that this calculation has consistently suggested that a second referendum might produce a small majority for Remain, though that proportion appears to have increased somewhat in the later stages of the Brexit process. This pattern is consistent with that evident in many opinion polls (Curtice, 2019). It is enough to raise doubts about whether, two and half years after the original ballot, leaving the EU necessarily continues to represent the view of a majority of the British public, but given the potential frailties of all survey work the Remain lead in our data is not sufficiently large for anyone to be sure what the outcome of any second ballot would be, especially as any such ballot would occur after a campaign that might result in a shift of opinion in one direction or the other.

Table 14 Extrapolated Hypothetical Repeat Referendum Vote, September 2016-February 2019

	Sep 16	Feb 17	July 17	Oct 17	June 18	Feb 19
Extrapolated Hypothetical Repeat Referendum Vote	%	%	%	%	%	%
Remain	52	51	52	52	54	55
Leave	48	49	48	48	46	45

Note: The figures in this table have been calculated by applying the net swing in support for Remain and Leave since June 2016 as measured by our data to the actual outcome of the referendum in June 2016.

The potential frailty of arguments that leaving the EU is necessarily still the ‘will’ of a majority of the British public and of claims that a second referendum would necessarily result in a different majority outcome becomes clear if we look at the turnover of support for remaining in and leaving the EU since the EU referendum. In Table 15 we show separately for those who voted Remain, Leave, and did not vote in 2016 how they say they would vote in another ballot. This analysis demonstrates that most of those who voted Remain or Leave would vote the same way again, though, as we might expect, there are signs that the proportion who would do so has fallen slightly as time has passed. The fact that most people would vote the same way again is not surprising given that, as has been shown previously (Curtice, 2018b), at least two in five voters describe themselves as either a ‘very strong Remainer’ or a ‘very strong Leaver’, a finding that our latest survey, in which 46% described themselves in one of those two ways, has replicated.

Table 15 Hypothetical Repeat Referendum Vote by Reported Referendum Vote, Sept. 2016-June 2018.

	Sep 16			Feb 17			July 17		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
Current Preference	%	%	%	%	%	%	%	%	%
Remain	96	8	43	92	8	39	93	10	50
Leave	2	88	32	7	88	28	4	88	26
Would Not Vote	2	4	25	2	3	33	3	3	23
	Oct 17			June 18			Feb 19		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
Current Preference	%	%	%	%	%	%	%	%	%
Remain	90	10	48	90	12	49	89	13	56
Leave	9	84	28	6	81	23	8	79	19
Would Not Vote	1	6	24	4	6	27	3	8	25

Note: Those who said they did not know how they would vote or who refused to say how they would do so have been excluded from the denominator on which the figures in this table are based.

However, there are two further patterns that we should note. First, those who voted Leave have always appeared a little less likely to say that they would vote the same way again. For example, in September 2016, while 96% of those who voted Remain in 2016 said that they would vote the same way again, the equivalent figure among those who backed Leave was 88% - though the difference between the two figures was a little narrower in the surveys that we undertook in 2017. More recently, however, the gap has widened somewhat, and in our latest survey, only 79% of those who said that they voted Leave in 2016 indicate they would vote the same way again, whereas 89% of Remain supporters say they would do so. This is evidently part of the reason why our surveys suggest that a second referendum might potentially produce a different majority outcome.

But it is far from being the only reason. For what is also making a significant contribution to the apparent swing to Remain since 2016 is that those who did not vote in the last referendum have, during the course of the Brexit process, become increasingly inclined to say that in another ballot they would vote Remain. There was some evidence of this just months after the referendum, when 43% of those who said they did not vote in 2016 stated that they would vote Remain, compared with 32% who indicated they would vote Leave. However, this gap has gradually widened during the Brexit process and now no less than 56% indicate that they would vote Remain while just 19% state that they would back Leave. The one section of the electorate

that has apparently most clearly changed its mind during the Brexit process comprises those who did not participate first time around.

Two implications flow from this finding. Inevitably, there must be a question mark about whether those who did not vote first time around would necessarily do so second time around. Even if a majority of those eligible to vote in any future EU referendum are in favour of remaining in the EU, there is no guarantee that this will be reflected in the ballot box. At the same time, however, although the turnout of 71% in the EU referendum was higher than that at recent general elections, it still meant that plenty of potential votes were not cast, while the passage of time means that there is now a body of people who would be able to vote in a second ballot but who were too young to do so in 2016. We therefore should not be surprised that some people feel that there is scope to question whether the ‘will’ of the people is still the same.

That still leaves the question of why some of those who voted Leave in 2016 state that they would not do so again. One obvious possibility given the evidence we present earlier in this paper is that their reluctance to vote the same way again is a reflection of their dissatisfaction with the deal that has emerged out of the Brexit negotiations. Of this, however, there is little sign. Those who say they would not vote Leave again have very similar views about the merits of the deal to those who would vote the same way again. Thus, while 67% of those who would not vote Leave again think that the UK is heading for a bad deal, so also do 63% of those who would vote Leave again. The disappointment that many Leave voters evidently have with the way in which Brexit seems destined to be implemented does not seem to have undermined their support for the principle of leaving the EU.


What does distinguish those who would vote Leave again from those who would not are their views of the economic consequences of leaving the EU (see also Curtice, 2018a). Nearly two-thirds of those who would not vote Leave again now say that leaving the EU would be bad for the British economy. In contrast, just 15% of those who would vote the same way again take that view. Although the erosion of Leave voters’ confidence in the economic benefits of Brexit has been relatively modest, it looks as though it has played a role in reducing the propensity of some of them to cast a Leave vote a second time around.

CONCLUSION

In this paper, we have asked how, during the course of the last two and a half years, voters in Britain have viewed and reacted to the efforts of their politicians to implement the instruction they were given in 2016 that the UK should leave the EU. In so doing, we have argued from the premise that if the first phase of the Brexit process is to be regarded as having been a success, one of the tests that it should meet is that it should have produced an outcome with which voters – or at least those who voted Leave – are satisfied.

This was, perhaps, never going to be an easy test to pass, given that the kind of deal that might have appealed to many Remain and Leave voters was never on offer. Even so, it seems that for the most part the Brexit process has failed our test. Voters as a whole have become increasingly critical of how Britain’s withdrawal from the EU has been handled, both by the UK government and by the EU, and most are now unhappy with the deal that has eventually emerged. Voters as whole are now also somewhat more doubtful about the economic consequences of leaving.

However, what perhaps is most important is that many of these trends have been most in evidence among Leave voters, who not only (as we might expect) have become more critical of the EU, but also have become somewhat more doubtful about the economic consequences



of leaving, have become deeply critical of the performance of the UK government, and largely feel that the UK is heading for a bad deal. Indeed, so deep is their disenchantment, they have become as critical of the UK government's handling of the Brexit process as they are that of the EU, and are just as likely as Remain voters to feel that the UK is getting a bad deal. The very voters who were responsible for giving the politicians their instructions are for the most part unhappy with the way in which those instructions have been implemented.

Against this backdrop, it is perhaps not surprising that there is seemingly room for debate about whether leaving the EU is still the 'will' of a majority of voters in the UK. There is reason to believe that a second ballot might potentially produce a different outcome, but it is far from certain that it would do so. Perhaps the key message for the politicians as they decide what to do about the next stage of the Brexit process is that, having been widely seen to have done a poor job of implementing Brexit so far, those on all sides of the argument might be best advised to show a degree of humility when claiming to know what voters really want.

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