What UK Thinks EU

BREXIT IS DONE – BUT WHAT DO VOTERS MAKE OF IT?

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UK IN A CHANGING EUROPE

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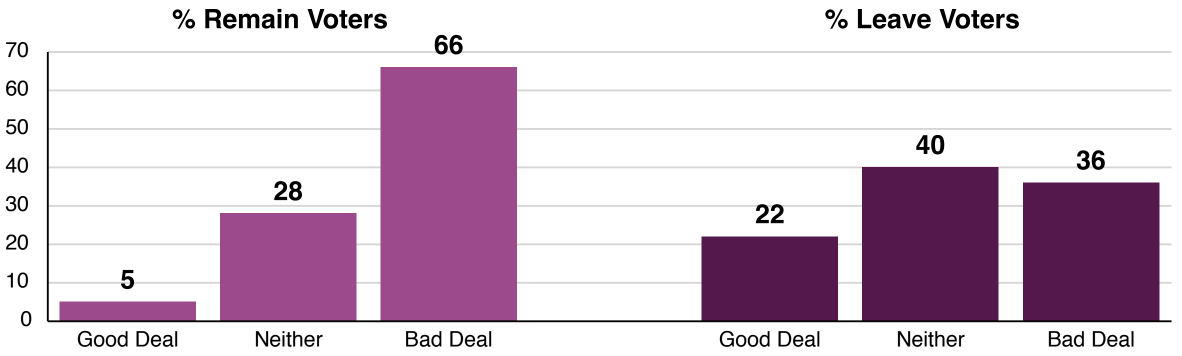
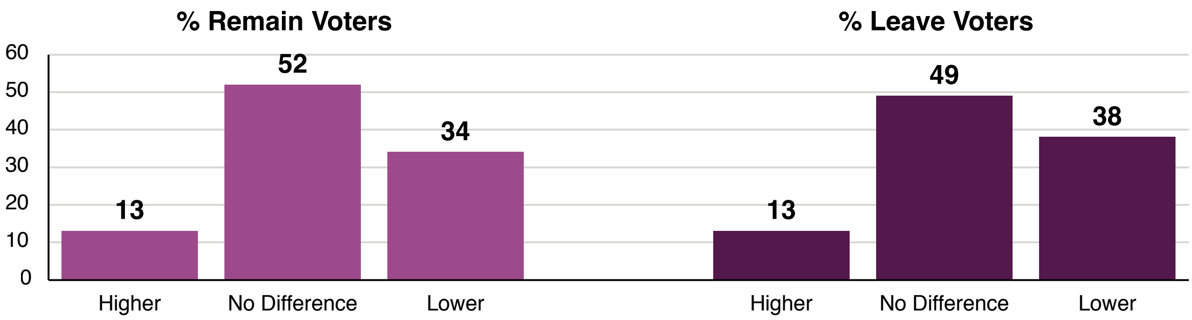
SUMMARY

Voters have now had nearly a year to consider how well the Brexit deal that the UK government negotiated with the EU has been working out in practice. This paper examines public expectations and attitudes towards the outcome of the Brexit negotiations during the course of the Brexit process, and assesses some of the possible influences behind and consequences of the assessment they have now reached.

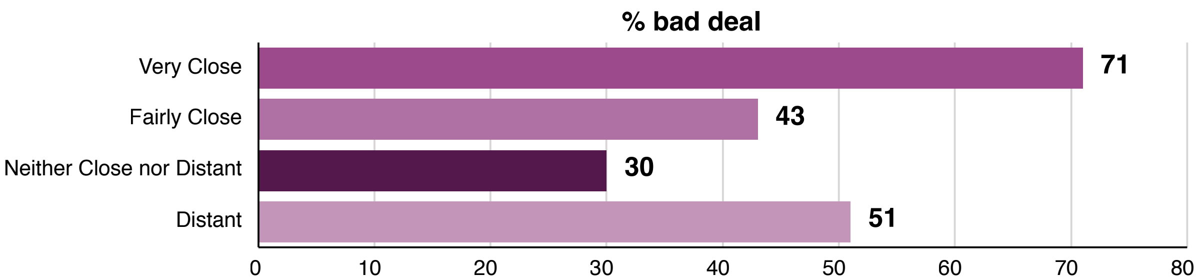
1. Most Remain voters believe Britain has got a bad deal – while even Leave voters are lukewarm about what has been achieved



2. Only a minority of both Remain and Leave voters now believe that Brexit will result in lower immigration



3. Both those who would like a 'very close' relationship with the EU and those who would like a 'distant' one are more likely to say Britain has a bad deal



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INTRODUCTION

Britain completed its exit from the European Union at the end of December 2020 when it left the EU single market and customs union. Its future relationship with the EU was now to be determined by the Trade and Co-operation Agreement that had been reached with the EU just before Christmas, as well as the Withdrawal Treaty that had been negotiated earlier (HM Government, 2019: 2020a.) The country has now had nearly a year within which to begin to come to a conclusion about whether it has emerged with a good deal or a bad one.

What voters make of the Brexit deal after seeing it in action for a while – and the sources and implications of their evaluation – is the central question addressed by this briefing. It might be thought that the delivery of the final stage of Brexit at the beginning of this year would signal the end of the division and debate about Brexit. In exiting the EU single market and customs union, Britain was now outside the economic structure of the EU as well as its political institutions. Meanwhile, not only was Brexit now well and truly 'done' but for much of the year the coronavirus pandemic still dominated the headlines, while neither Labour nor the Liberal Democrats have shown any enthusiasm for keeping the issue in the political spotlight. Against this backdrop, we might anticipate that opposition to the deal among Remain voters might have dissipated as they came to the conclusion that the Brexit debate was over, while Leave supporters would applaud a deal that had finally delivered the Brexit for which they had voted.

Against this, however, we should remember that Brexit had stirred people's emotions. During the Brexit process over two in five had come to regard themselves as either a very strong 'Remainer' or a very strong 'Leaver' – suggesting a strength of commitment to the two 'camps' not seen in the country's party politics since the 1960s (Curtice and Montagu, 2019; Hobolt et al., 2021). Meanwhile, the two sides in the Brexit debate were socially and ideologically far apart – younger people, graduates and social liberals backed Remain, while older people, those with few if any qualifications and social conservatives supported Leave (Curtice, 2017; Clarke et al., 2017). Brexit represented not just a disagreement about Britain's relationship with the EU but also reflected a fracture within British society that had long been in the making (Sobolewska and Ford, 2021). Meanwhile, the trade deal that concluded the Brexit process has widely been portrayed as a relatively 'hard' Brexit, not least because of the UK government's reluctance to be required to maintain regulatory alignment with the rest of the EU (Economist, 2020; Smith, 2020; HM Government, 2020b; Usherwood, 2021). Consequently, while Leave voters might believe that Britain had obtained a good deal out of Brexit, Remain voters at least may still be deeply sceptical.

To test which of these perspectives is correct now that the Brexit deal has had the chance to bed down for a while, between 29 July and 29 August 2021 we interviewed 2,225 members of NatCen's mixed mode random probability panel (Jessop, 2018) in order to ascertain how good or bad a deal they now thought Britain had obtained, and how far their views reflected not only how they voted in 2016 but also their evaluation of how the Brexit process had been handled and what they now thought the consequences would be.[1] The data have been weighted by demographic background and how people responded when they were first recruited into the panel via the annual British Social Attitudes survey (Clery et al., 2021; Curtice et al., 2020) This latest survey represented the twelfth in a series of such surveys stretching back to the autumn of 2016 (Elliott and Scholes, 2021). Between them, they provide us with a unique insight into how attitudes towards the delivery of Brexit have evolved during the course of the withdrawal process.

1 This represented a response rate of 80% among those who were invited to participate in the survey.

We begin by looking at the pattern of attitudes towards the Brexit deal that the UK has obtained. We then assess some of the possible influences on the judgement to which people might have come, including their perceptions of the consequences of Brexit, the way that the issue has been handled by the two parties to the deal, and the kind of relationship that people hoped that the UK would have with the EU. Then, after examining the role that Brexit identities have played in shaping attitudes, we look at the interplay between people's evaluations of the Brexit deal and their attitudes towards the principle of Brexit five years on. We conclude by examining the implications of our findings for the future of the debate about Brexit.

REFLECTING ON THE DEAL

For most of the Brexit process, voters were relatively pessimistic about the kind of deal that the UK would secure from its negotiations with the EU (see Table 1). This was particularly true during 2019, when there was a parliamentary stalemate over the terms of the proposed withdrawal treaty (Grey, 2021) – at that point two-thirds thought that Britain would emerge with a bad deal. Yet even in July 2020, when the UK had left the political institutions and was now negotiating a trade deal, it continued to be the case that approaching half (46%) reckoned that the UK would secure a bad deal, while only one in eight (12%) thought it would obtain a good one. However, when we surveyed people in January 2021, shortly after the trade agreement had been put in place, it appeared that public opinion might now be swinging in its favour, though at 36% those who thought the UK had obtained a bad deal still clearly outnumbered those who thought it was a good one (21%).

Yet it appears that, a few months on, once again nearly half (48%) of voters feel that the UK has secured a bad deal, while just 12% believe it has obtained a good one. It seems that what may well have been a degree of relative optimism that had been generated by the initial unveiling of the trade agreement with the EU dissipated quite quickly. While the deep pessimism that pervaded the 2017-19 Parliament had not returned, it appears that Lord Frost's efforts in negotiating the Trade and Co-operation Agreement with the EU did not in the end do much to convince the public that the UK had secured a good deal. Rather, it would appear that the outcome of those talks was something of a disappointment for many voters.

Table 1: Evaluations/Expectations of Whether Britain Will Get/Has Got a Good or Bad Deal out of the Brexit Talks, February 2017 – August 2021

Expect Britain to get a...	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
	%	%	%	%	%	%	%
Good Deal	33	25	19	17	6	6	11
Neither Good Nor Bad	27	29	28	25	28	26	31
Bad Deal	37	44	52	57	63	66	54
Net: Good-Bad	-4	-19	-33	-40	-57	-60	-43

	2020		2021	
	Feb	July	Jan	Aug
	%	%	%	%
Good Deal	17	12	21	12
Neither Good Nor Bad	40	39	43	40
Bad Deal	41	46	36	48
Net: Good-Bad	-34	-34	-15	-36

Between February 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?* In September 2019, and February and July 2020 the question read: *How good or bad do you think the terms and conditions under which Britain leaves the EU will be?* The wording in Nov/Dec 2019 read: *From what you have seen and heard so far, how good or bad are the terms and conditions under which it is proposed Britain should leave the EU?* The wording in January and August 2021 read: *From what you have seen and heard so far, how good or bad do you think are the terms and conditions under which Britain has left the EU?*

Of course, it might be thought that the apparent unpopularity of the Brexit deal is simply the product of a hostile response from Remain voters, and that at least the deal is still welcomed by those who had voted Leave in 2016. Indeed, as Table 2 shows, Remain voters are very critical of the outcome of the Brexit negotiations, just as they have been inclined to be throughout the Brexit process. No less than two-thirds of them (66%) said in our latest survey that the deal is bad, while just 5% reckon it is good. Yet even Leave voters are decidedly lukewarm about the deal. Even among those who voted for Brexit, in our latest survey rather more (36%) believe that the UK has obtained a bad deal than feel it has secured a good one (22%). True, Leave voters have not given the deal the kind of frosty reception with which they greeted the version of the Withdrawal Treaty that Theresa May brought back in late 2018 (shortly thereafter 66% said they thought the UK was heading for a bad deal), but it seems many a Leave voter is still not particularly enthusiastic about the Brexit deal that has been delivered. Moreover, Table 2 also reveals that the swing away from approval of the deal since January has been just as large among Leave voters as it has been among Remain supporters – the proportion who feel that the UK has secured a bad deal has increased by 13 points among Remain voters and 14 points among Leave supporters. Indeed, it is that movement that has tilted the balance of opinion away from approval of the deal among Leave voters.

Table 2: Expectations/Evaluations of Whether Britain Will Get/Has Got a Good or Bad Deal out of the Brexit Talks by EU Referendum Vote, February 2017 – August 2021

Voted Remain 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
Expect Britain to get a...	%	%	%	%	%	%	%
Good Deal	17	12	11	9	6	3	7
Neither Good Nor Bad	25	24	20	18	28	18	25
Bad Deal	56	63	68	72	64	77	66
Net: Good-Bad	-39	-41	-57	-63	-58	-74	-59

	2020		2021	
	Feb	July	Jan	Aug
Expect Britain to get a...	%	%	%	%
Good Deal	8	6	16	5
Neither Good Nor Bad	31	24	30	28
Bad Deal	59	70	53	66
Net: Good-Bad	-51	-64	-37	-61

Voted Leave 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
Expect Britain to get a...	%	%	%	%	%	%	%
Good Deal	50	39	27	26	6	8	16
Neither Good Nor Bad	27	33	33	33	25	32	34
Bad Deal	20	26	38	40	66	57	46
Net: Good-Bad	+30	+13	-9	-14	-60	-49	-30

	2020		2021	
	Feb	July	Jan	Aug
Expect Britain to get a...	%	%	%	%
Good Deal	27	23	35	22
Neither Good Nor Bad	44	46	43	40
Bad Deal	26	28	22	36
Net: Good-Bad	+1	-5	+13	-14

One consequence of the fact that much the same swing has occurred among both Remain and Leave voters is that the gap between their perceptions is just as marked now as it was when the UK exited the EU at the end of January 2020. Immediately after that development, the difference between the proportion anticipating a good deal and those expecting a bad one was +1 among Leave voters, but -51 among Remain supporters, a difference of 52 points. Now the equivalent calculation still shows a difference between the two groups in their balance of opinion of 47 points. In short, the two groups are still as divided now over the outcome of the Brexit process as they were when withdrawal was initially achieved.

CONSEQUENCES

Two of the central issues in the referendum campaign were immigration and the economy (Clarke et al., 2017; Curtice, 2017). Many of those who voted Leave did so in the expectation that exiting the EU would help to reduce immigration, while many who backed Remain did so because of a concern that leaving would be costly for Britain's economy. We might therefore anticipate that people's evaluations of the deal Britain had secured from the Brexit negotiations are affected by their views now about whether or not immigration will fall and whether or not the economy will suffer.

Table 3 reminds us that in practice the expectation that immigration would fall in the wake of Brexit became less commonplace not long after the 2016 referendum. In a survey conducted via the NatCen panel during the EU referendum campaign, as many as 64% said that they thought immigration would be lower as a result of Britain leaving the EU (Cabrera-Alvarez et al., 2016). Three months later the figure had already fallen to 38%. It has remained at something close to that level ever since, albeit with slight upticks immediately after the UK left the EU and again after the trade deal with the EU was concluded. It now stands at 37%. In short, perceptions of the impact of Brexit on immigration have never exhibited the volatility in the proportion expecting the UK to secure a good or bad deal that has been evident during the course of the Brexit process. Indeed, further analysis reveals that there is little relationship between people's perceptions of the impact of leaving the EU on immigration and how they now evaluate the deal the UK has secured. While 51% of those who think that immigration will fall reckon the UK has secured a bad deal, so also do 46% of those who reckon that immigration will stay the same or increase.[2] It appears that the issue does not have the same force in the Brexit debate as it did at the time of the EU referendum.

2 This finding continues to be valid if we look at Remain and Leave voters separately. In contrast, on the first occasion (in February 2017) that we asked respondents how good or bad a deal they thought Britain would get, those Leave voters who thought that immigration would fall were somewhat more likely (53%) than those who did not (48%) to expect the UK to get a good deal. Equally, among Remain voters those who thought immigration would fall were more likely (62%) than those who did not (53%) to expect Britain to obtain a bad deal. In other words, at that stage the perception that immigration would fall seemingly pushed Remain and Leave voters in opposite directions so far as the anticipated merits of the Brexit deal were concerned. That pattern is no longer present.

Table 3: Expectations of the Consequences of Leaving the EU for the Level of Immigration, June 2016 – August 2021

Expect Brexit to mean immigration will be:	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
	%	%	%	%	%	%	%
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
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
	%	%	%	%	%	%	%
Higher	7	5	7	7	8	8	14
Not much difference	57	54	53	47	54	46	49
Lower	35	40	38	45	36	46	37
Net: Lower-Higher	+28	+35	+31	+38	+28	+38	+23

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-August 2021: *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?*

Indeed, there is little difference between those who voted Remain and those who backed Leave in their expectations of what will happen to immigration in the wake of Brexit (see Table 4). At 34% the proportion of Remain voters who now think that immigration will fall is similar to the proportion of Leave voters who hold this view (38%). This stands in sharp contrast to the position in the autumn after the referendum when Leave supporters (55%) were more than twice as likely as Remain voters (26%) to believe that immigration would fall. However, whereas Remain voters have been relatively consistent in their views for much of the Brexit process, the expectation among Leave voters that immigration would fall has gradually diminished over time – and is now lower than it has been than at any time since the referendum. It is this shift that helps explain why the issue is no longer important to people's evaluations of the outcome of the Brexit negotiations.

Table 4: Expectations of the Consequences of Leaving the EU for the Level of Immigration by EU Referendum Vote, June 2016 – August 2021

Voted Remain 2016	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
Expect Brexit to mean immigration will be:	%	%	%	%	%	%	%
Higher	11	7	8	9	8	5	8
Not much difference	41	67	58	60	57	57	57
Lower	47	26	33	31	36	36	35
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
Expect Brexit to mean immigration will be:	%	%	%	%	%	%	%
Higher	7	5	6	7	7	6	13
Not much difference	61	59	59	50	55	49	52
Lower	31	35	34	43	37	44	34
Voted Leave 2016	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
Expect Brexit to mean immigration will be:	%	%	%	%	%	%	%
Higher	2	5	6	8	4	8	7
Not much difference	13	39	38	42	41	48	44
Lower	85	55	55	49	55	43	48
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
Expect Brexit to mean immigration will be:	%	%	%	%	%	%	%
Higher	6	4	6	6	8	7	13
Not much difference	53	49	46	42	51	40	49
Lower	40	46	46	52	40	52	38

For June 2016, Remain and Leave are defined by respondents' vote intentions.

But what of voters' expectations of the economic consequences of leaving the EU? As Table 5 shows, these have also been relatively stable over time, albeit the mood has been somewhat more pessimistic since the middle of 2017 (and thus since the general election of that year) than it had been previously. That said, the balance of opinion was especially negative during 2019, when Brexit was the subject of a stalemate in the House of Commons and when as a result, as Table 1 above shows, voters were particularly inclined to the view that the UK was going to emerge with a poor deal. Moreover, in contrast to the position in respect of immigration, there is a clear link between people's perceptions of the economic consequences of Brexit and how good or bad deal they think the UK has obtained. No less than 64% of those who think that the economy will be worse off as a result of Brexit now say that Britain has got a bad deal, twice the proportion (32%) among those who believe the economy will be better off. It seems that perceptions of the economic consequences of Brexit do still matter in the minds of voters.

Table 5: Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – August 2021

Expect Brexit to mean economy will be:	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
	%	%	%	%	%	%	%
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
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
	%	%	%	%	%	%	%
Better Off	19	20	21	26	21	25	23
Not much difference	23	23	22	22	28	22	24
Worse Off	56	55	56	50	49	53	52
Net: Lower-Higher	-37	-35	-35	-24	-28	-28	-29

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-August 21: *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?*

Indeed, also unlike immigration, this is an issue on which Remain voters and Leave supporters have very different outlooks. As Table 6 shows, ever since the EU referendum around four in five Remain voters believe that the economy will be worse off as a result of Brexit, albeit the figure has dipped slightly to three-quarters (75%) in our most recent survey. In contrast, Leave voters are still almost as optimistic about the economic consequences of Brexit as they were at the time of the referendum. Slightly more than half (53%) now say the economy will be better off, very similar to the 54% who were of that view at the time of the referendum, though, at 18%, the proportion who think the economy will be worse off is somewhat higher than it was then (8%).

Table 6: Expectations of the Consequences of Leaving the EU for the Economy by EU Referendum Vote, June 2016 – August 2021

Voted Remain 2016	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
Expect Brexit to mean economy will be:	%	%	%	%	%	%	%
Better Off	8	5	7	6	6	4	4
Not much difference	22	15	13	14	11	15	12
Worse Off	69	79	78	79	81	80	83
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
Expect Brexit to mean economy will be:	%	%	%	%	%	%	%
Better Off	4	4	5	6	4	6	7
Not much difference	13	11	11	14	16	11	17
Worse Off	82	84	84	79	80	83	75
Voted Leave 2016	2016		2017			2018	2019
	June	Sept	Feb	July	Oct	June	Feb
Expect Brexit to mean economy will be:	%	%	%	%	%	%	%
Better Off	54	58	54	46	45	51	41
Not much difference	35	32	30	35	34	30	32
Worse Off	8	9	15	18	21	17	25
	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
Expect Brexit to mean economy will be:	%	%	%	%	%	%	%
Better Off	39	40	46	56	46	51	53
Not much difference	34	35	32	29	36	28	28
Worse Off	26	24	21	15	18	20	18

For June 2016, Remain and Leave are defined by respondents' vote intentions.

However, we cannot account for the increase between January and August in the proportion who reckon that Britain has obtained a bad deal with reference to the perceived economic consequences of leaving the EU. That increase has occurred at a time when the balance of attitudes towards the economic consequences of Brexit has been relatively stable. Indeed, further analysis reveals that the proportion who thought that Britain will get a bad deal increased just as much among those who thought that the economy would be better off as it did among those who thought the economy would be worse off.

Adaptation

Another related possibility, of course, is that voters think poorly of the Brexit deal because they feel it is proving difficult for Britain to adapt to life outside the EU. In our latest survey, we repeated a question first asked back in January that read as follows:

> Britain fully left the EU at the beginning of January. Given what you have seen and heard since then, would you say that adapting to being fully outside the EU has in practice been straightforward or difficult for Britain?

During the first weeks of the deal – when the media had been highlighting the prospect of long queues of lorries trying to cross the Channel (Baker, 2020) - there was a widespread perception that adapting to life outside the EU was proving relatively difficult. Back in January, just 14% said that life outside the EU was proving straightforward, while as many as 56% felt that it was proving difficult. These figures have barely changed since (even though the threatened lorry queues did not materialise after 1 January, see Foster and Gross, 2021); only 13% say that life outside the EU is straightforward while 59% now say that it is proving difficult. As we might anticipate, Remain voters (75%) are more likely than Leave supporters (44%) to say that it is proving difficult. Meanwhile, those who hold this view are more likely to say that Britain has obtained a bad deal – as many as 65% of those who do so believe that the UK has secured a bad Brexit deal, compared with just 27% of those who believe it has a good deal. But, of course, which of these perceptions is cause and which effect is difficult to disentangle. In any event, the fact that the balance of opinion on the ease of adaptation has not materially altered since January certainly indicates that it does not account for the increase since then in the proportion who think that the UK has a bad Brexit deal.

HANDLING

Voters' perceptions of how good or bad a deal the UK has obtained could also be a reflection of how well the two parties to the agreement are thought to have handled the issue. If voters are convinced that Brexit has been well handled this might have persuaded them that the negotiations have produced a favourable outcome. Meanwhile, in recent months in particular, voters' perceptions of the deal might have been influenced by how well the UK and EU are thought to have implemented the deal to which they jointly agreed.

Table 7 shows how well or badly the UK and the EU are thought to have handled the UK's withdrawal from the EU during the course of the Brexit process. It reveals that the public have never been highly enamoured of how well the UK government has been handling Brexit, with criticism being particularly widespread during the parliamentary stalemate in 2019. The eventual delivery of Brexit reversed that sentiment, but our most recent survey suggests that the public are now more critical than they have been at any time since the UK's withdrawal in January 2020. Just 16% now said that the UK government was handling Brexit well, down six points on the reading at the beginning of the year, while as many as 57% (up three points on January) indicated that the government had handled the issue badly.

Table 7: Perceptions of How Well/Badly the UK government and the EU have handled Brexit, February 2017 – August 2021

UK government handling Brexit	2017			2018	2019			2020		2021	
	Feb	July	Oct	June	Feb	Sept	Nov/Dec	Feb	July	Jan	Aug
	%	%	%	%	%	%	%	%	%	%	%
Well	29	19	15	13	7	4	9	24	19	22	16
Neither Well nor Badly	28	25	24	22	11	8	8	22	30	24	25
Badly	41	55	61	64	81	88	82	53	50	54	57
Net: Well-Badly	-12	-36	-46	-51	-74	-82	-73	-29	-31	-32	-41

EU handling Brexit	2017			2018	2019			2020		2021	
	Feb	July	Oct	June	Feb	Sept	Nov/Dec	Feb	July	Jan	Aug
	%	%	%	%	%	%	%	%	%	%	%
Well	17	21	17	16	16	14	22	23	n/a	21	15
Neither Well nor Badly	35	31	25	25	22	20	23	32	n/a	31	32
Badly	46	47	57	57	61	65	53	44	n/a	48	53
Net: Well-Badly	-29	-26	-40	-41	-45	-51	-31	-21	n/a	-27	-38

n/a: not asked
Before January 2021: Would you say that the UK government/the EU is handling the UK's exit from the EU well or badly? Since January 2021: Would you say that the UK government/the EU has handled the UK's exit from the EU well or badly?

The balance of attitudes towards the EU's handling of Brexit has not varied so much during the Brexit process – but has also been largely negative. Never have less than 44% reckoned that the EU has handled the issue badly, or more than 23% felt that it was dealing with the question well – and both those figures were recorded in February 2020, immediately after the UK left the EU's political structure. Meanwhile, as in the case of perceptions of the UK government's handling, evaluations are somewhat more negative in our latest survey than they were in January. Now 53% said the EU was handling Brexit badly, up five points on the beginning of the year, while just 15% reckoned it was handling the issue well, a fall of six points.

Voters have then been persistently critical of both how the UK government and the EU have handled Brexit. Either or both patterns might help account for the (now increased) feeling that the UK has secured a bad deal. However, we should note from Table 8 that although Leave supporters were once far more likely than Remain voters to be critical of the EU – and especially so during the parliamentary stalemate of 2019 – their attitudes have now converged considerably. As many as 53% of Remain voters now say that the EU has handled Brexit badly, only 15 points below the equivalent figure for Leave supporters - a reflection perhaps of some intense criticism of a short-lived attempt by the EU at the very end of January 2021 to control the import of vaccines into Northern Ireland (Curtis, 2021). However, this suggests that evaluations of the EU's handling of Brexit may not now be pertinent to people's views about the Brexit deal. Indeed, those who think the EU has handled Brexit badly (58%) are only a little more likely than those who think it has handled the issue well (50%) to say that the UK has obtained a bad deal.

Table 8: Perceptions of How Well/Badly the EU has Handled Brexit by EU Referendum Vote, February 2017 – August 2021

Voted Remain 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
EU handling Brexit	%	%	%	%	%	%	%
Well	17	26	22	22	24	24	34
Neither Well nor Badly	38	33	27	29	26	24	30
Badly	42	38	50	49	49	51	36

	2020		2021	
	Feb	July	Jan	Aug
EU handling Brexit	%	%	%	%
Well	33	n/a	28	18
Neither Well nor Badly	33	n/a	30	29
Badly	32	n/a	42	53

Table 8: Continued

Voted Leave 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
EU handling Brexit	%	%	%	%	%	%	%
Well	16	15	10	11	8	6	13
Neither Well nor Badly	28	28	19	18	12	10	12
Badly	55	56	71	69	79	83	74

	2020		2021	
	Feb	July	Jan	Aug
EU handling Brexit	%	%	%	%
Well	17	n/a	16	10
Neither Well nor Badly	25	n/a	22	22
Badly	57	n/a	62	68

The same cannot be said of evaluations of how well the UK government has handled Brexit. True, as Table 9 shows, Leave voters were heavily critical of the performance of the UK government during the parliamentary stalemate in 2019, and were almost at one with Remain supporters on the issue at that time. However, the subsequent delivery of Brexit saw the two sets of voters move well apart from each other. Whereas since the UK left the EU consistently around three-quarters of Remain voters have said that the UK was handling Brexit badly, only around a third or so of Leave supporters have taken the same view. Indeed, until our most recent survey, more Leave supporters have been saying that Brexit was being handled well by the UK government than have been stating that it was doing so badly, a pattern that had not been in evidence since the early months of the Brexit process.

Table 9: Perceptions of How Well/Badly the UK has handled Brexit by EU Referendum Vote, February 2017 – August 2021

Voted Remain 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
UK government handling Brexit	%	%	%	%	%	%	%
Well	18	10	9	9	5	1	4
Neither Well nor Badly	26	21	19	16	10	4	6
Badly	55	68	71	76	85	94	90

	2020		2021	
	Feb	July	Jan	Aug
UK government handling Brexit	%	%	%	%
Well	11	7	11	7
Neither Well nor Badly	18	19	15	16
Badly	71	74	74	76

Table 9: Continued

Voted Leave 2016	2017			2018	2019		
	Feb	July	Oct	June	Feb	Sept	Nov/Dec
UK government handling Brexit	%	%	%	%	%	%	%
Well	42	28	21	21	10	8	14
Neither Well nor Badly	29	32	28	24	9	7	10
Badly	27	39	50	53	80	84	76

	2020		2021	
	Feb	July	Jan	Aug
UK government handling Brexit	%	%	%	%
Well	45	38	42	33
Neither Well nor Badly	21	32	23	27
Badly	33	29	35	35

Consequently, it should not come as a surprise that perceptions of how well the UK government has handled Brexit are related to people's views about the Brexit deal. Among those who think that the UK government has handled Brexit badly, no less than 70% believe that the UK has secured a bad deal, whereas only 16% of those who feel that the UK government has handled Brexit well take the same view. This means the more critical view in recent months towards how the UK government has handled matters could help account for the increase since January in the proportion who believe that the UK has obtained a bad deal. However, it is far from the major explanation – even among those who believe that the UK government has handled Brexit well the proportion who feel that the UK has secured a bad deal is eleven points higher in our latest survey than it was at the beginning of the year (and equally is ten points higher among those who feel it has performed badly).

PREFERRED RELATIONSHIP

So far, we have looked at people's evaluations of how the parties to the Brexit deal have handled the issue together with their perceptions of how it has worked out so far in practice. But perhaps a more immediate influence on people's opinion about the Brexit deal is what it means for the UK's future relationship with the EU. They might believe that the UK should have a distant relationship with the EU and feel that the deal that has been negotiated still ties the UK too closely to the EU's orbit. Or perhaps they feel that the UK should still have a close relationship with the EU but that the deal entails too much of a break.

Contrary to what might have been anticipated given that Britain voted to leave the EU, most people still say that the UK should have a close relationship with the EU (see Table 10). In our latest survey as many as 70% said that the UK should have either a 'very' or a 'fairly' close relationship with the EU, while just 8% said that it should be a distant one. Moreover, the perspective has changed little since we first started asking this question at the beginning of 2019.

Table 10: Preferred Closeness of Relationship between the UK and the EU, March 2019 – August 2021

Relationship should be	2019		2020		2021	
	Mar	Sept	Feb	July	Jan	Aug
	%	%	%	%	%	%
Very close	26	28	25	23	25	26
Fairly close	37	41	42	41	44	44
Neither close nor distant	26	22	23	26	24	22
Fairly distant	7	7	8	7	6	7
Very distant	3	2	2	1	1	2

Yet despite this apparent near-consensus, there is still a sharp difference between the preference of those who voted Remain and that of those who backed Leave. As Table 11 shows, no less than 45% of Remain voters believe that the UK should have a 'very close' relationship with the EU, whereas only 8% of Leave voters take that view. While most Remain voters (87%) want a close (either 'very' or 'fairly') relationship, most Leave supporters (80%) want one that they would describe as either 'fairly close' or 'neither close nor distant', a pattern of divergence that has proven relatively consistent over time. In short, while most Remain voters (unsurprisingly) want the UK still to have a close relationship with the EU, it would appear that most Leave voters want to keep the EU at arms' length but still have an effective working relationship.

Table 11: Preferred Closeness of Relationship between the UK and the EU by EU Referendum Vote, March 2019 – August 2021

Remain Voters	2019		2020		2021	
	Mar	Sept	Feb	July	Jan	Aug
Relationship should be	%	%	%	%	%	%
Very close	46	48	43	42	43	45
Fairly close	37	40	40	39	43	41
Neither close nor distant	13	8	10	13	10	10
Fairly distant	3	3	6	5	3	3
Very distant	*	1	1	*	1	*
Leave Voters	**2019**		**2020**		**2021**	
	Mar	Sept	Feb	July	Jan	Aug
Relationship should be	%	%	%	%	%	%
Very close	9	9	10	6	9	8
Fairly close	36	43	49	49	49	49
Neither close nor distant	40	35	33	35	34	31
Fairly distant	10	10	8	9	7	10
Very distant	4	3	1	2	1	2

* Less than 0.5%.

Given this backdrop, it is unsurprising that people's views about Britain's relationship with the EU colour their evaluation of the deal that has been negotiated. As the top part of Table 12 shows, in our most recent survey as many as 71% who want a very close relationship believe that the UK has obtained a bad deal, while this view is shared by just 30% of those who want neither a close nor a distant relationship. Only among the relatively small number of respondents who would prefer a distant relationship is the pattern somewhat reversed, with 51% saying that the deal is a bad one – though people in this group are also most likely to say that the deal is a good one (17%). Although for the most part it is those who would like a close relationship with the EU who are least happy about the deal that has been negotiated, there is also it seems a small group who believe it is too close.

Of course, it may also be the case that what Leave voters mean by a 'fairly close' relationship with the EU is not necessarily the same as what Remain supporters imply. The latter might, perhaps, still have in mind something rather closer than what Leave voters who give that response envisage. Indeed, no less than 57% of Remain supporters who would prefer a 'fairly close' relationship say that Britain has obtained a bad deal, compared with just 32% of Leave voters who want a 'fairly close' relationship. Moreover, although not entirely absent among Leave voters, the link between preferred closeness and evaluations of the Brexit deal is stronger among Remain supporters, for whom willingness to accept the deal appears clearly to be inversely related to their wish for Britain still to be closely aligned with the EU.

Table 12: Evaluations of Whether Britain Has Got a Good or Bad Deal out of the Brexit Talks by Whether Prefer Close or Distant Relationship with the EU, January and August 2021

Britain has got a…	Very close	Fairly close	Neither close nor distant	Distant
August 2021	%	%	%	%
Good deal	6	14	12	17
Neither good nor bad	22	42	57	31
Bad deal	71	43	30	51
January 2021	%	%	%	%
Good deal	14	26	19	18
Neither good nor bad	28	44	56	36
Bad deal	57	29	21	46
Change in % January – August 2021				
Good Deal	-8	-12	-7	-1
Bad Deal	+14	+14	+9	+5

What Table 12 also reveals, however, is that the relationship between evaluations of the Brexit deal and people's preferred relationship has strengthened since the beginning of the year. The perception that Britain has obtained a bad deal has increased most among those who would like a close relationship, while, once we bear in mind that in January only 14% of those who would like a very close relationship said that the deal was a good one, it is also apparent that support for the idea that Britain has obtained a good deal fell away more markedly among those who want a close relationship. This pattern is apparent among both Remain and Leave voters separately. Whereas among Remain voters who want a close relationship there was a 15-point increase in the proportion who think that Britain has obtained a bad deal, among the minority who do not want a close relationship there has only been a two-point increase. Meanwhile, among Leave supporters who would like a close relationship there has been a 16-point fall in the proportion who think that Britain has obtained a good deal, compared with a seven point drop among those who did not want a close relationship.

It appears then that at least part of the reason why evaluations of the deal that Britain has obtained have become more negative during 2021 is that those who wanted a relatively close relationship with the EU have – irrespective of how they voted in the referendum - formed the view that the outcome of the negotiations with the EU have resulted in a harder Brexit than they would like to have seen implemented. That, perhaps, was always the risk that the UK government was taking when it opted to conclude what many commentators have portrayed as a relatively hard Brexit (Economist, 2020; Smith, 2020; Usherwood, 2021).

IDENTITY

As we noted in the introduction to this paper, one of the striking features of the post-referendum debate about Brexit is that many people have come to regard themselves as a ‘Remainer’ or a ‘Leaver’. The emergence of these affective identities is a reflection of the importance of the issue for many voters and the sharp social division in how people voted by age and educational background (Curtice, 2017; Clarke et al., 2017; Evans and Schaffner, 2019). We would anticipate that those who identify strongly with one of the two camps are particularly likely to have contrasting attitudes towards the merits of the Brexit settlement.

Of course, we might wonder first of all whether these identities are still widely held now that Brexit has been done (Curtice, 2020). Table 4 suggests that they are. At 37%, the proportion in our latest survey who say they either a ‘very strong’ Remainer or a ‘very strong’ Leaver is unchanged from January, while, at 14%, the proportion who say they do not identify with either label is no higher than it was in the middle of 2020. True the proportion who say they are ‘very strong’ identifiers has fallen away from the 46% figure at which it stood throughout 2019, when the parliamentary and public debate about Brexit was at its height, but it continues be an issue about which a significant section of the electorate feels strongly.

Table 13: Strength of Brexit Identity June 2018 – August 2021

	2018	2019			2020		2021	
	June	Feb	Mar	Sept	Feb	July	Jan	Aug
	%	%	%	%	%	%	%	%
Very strong	44	46	46	46	42	39	37	37
Fairly strong	33	33	33	33	34	32	37	35
Not very strong	12	11	11	12	15	15	15	14
Non-identifier	11	9	9	9	10	14	11	14

Those who identify very strongly as Remainers have very distinctive views about the Brexit deal (see Table 14). No less than four in five believe that the UK has obtained a bad deal. In contrast, just 36% of ‘not very strong’ Remainers say the deal is a bad one, only seven points above the equivalent figure (29%) among ‘not very strong’ Leavers, and only 12 points above the proportion (24%) among those who do not identify with either side at all. However, contrary to what we might have anticipated, only around a quarter of 'very strong' Leavers (26%) say that Britain has obtained a good deal, only eleven points above the figure (15%) for 'not very strong' Leavers. Moreover, 'very strong' Leavers are more likely than other Leavers to say that the deal is a bad one. It appears that while 'very strong' Remainers are decidedly hostile to the Brexit deal, this is not counterbalanced by approbation for what has been achieved among 'very strong' Leavers, many of whom appear to be decidedly lukewarm about the deal.

Table 14: Evaluations of Whether Britain Has Got a Good or Bad Deal out of the Brexit Talks by Strength of Brexit Identity, January and August 2021

	Very strong	Fairly strong	Not very strong
Remainers	%	%	%
Good deal	5	8	8
Neither good nor bad	14	39	53
Bad deal	80	53	36
Leavers	%	%	%
Good deal	26	21	15
Neither good nor bad	33	45	56
Bad deal	39	32	29
Change in % January – August 2021			
Remainers			
Good Deal	-4	-8	-12
Bad Deal	+15	+13	+4
Change in % January – August 2021			
Leavers			
Good Deal	-23	-7	-9
Bad Deal	+20	+9	+10

Among those who do not identify as either a Remainer or a Leaver, 8% said that Britain had obtained a good deal (unchanged on January) and 24% a bad one (up seven points).

In truth, this pattern reflects the kind of relationship with the EU preferred by 'very strong' Remainers and Leavers. No less than two-thirds of 'very strong' Remainers would like the UK to have a 'very close' relationship with the EU. In contrast, 'very strong' Leavers are divided between those who would like a distant relationship – at 22% this outlook is markedly more common among them than it is among any other group of voters – and those, comprising a still substantial group of 39%, who would like a close relationship. It looks as though some 'very strong' Leavers are critical of the deal the UK has obtained because they think it ties the UK too closely to the EU, whereas 'very strong' Remainers are nearly all evaluating the issue from a very different perspective.

Meanwhile, in our latest survey both groups are now especially more likely to say that the UK has secured a bad deal than was the case earlier this year. Although they may regard the issue from a very different perspective, it appears that it is the partisans on both sides in the Brexit debate who it is proving most difficult for the government to satisfy.

CURRENT PREFERENCE

We noted at the beginning of this paper that those who voted Remain and those who backed Leave in the 2016 referendum have rather different views about the deal the UK has obtained. But, of course, some may well have changed their views about Brexit in the meantime – including perhaps as a result of the progress and outcome of the withdrawal negotiations. Table 15, however, indicates that in fact relatively few people have changed their minds – though the proportion has grown somewhat over time. Indeed, at 83%, the proportion of Remain voters who would vote the same way again has fallen in our most recent survey to an all-time low. The attitudes of Leave voters in contrast have proven a little more volatile, and at the height of the parliamentary stalemate over Brexit the proportion who would vote the same way again fell at one point to around three-quarters (74%). That figure now stands at 81%, three points above that in January but still not quite on a par with the equivalent proportion among Remain supporters.

Table 15: Vote Intention in a Second EU Referendum by Reported Referendum Vote, September 2016 – August 2021

Vote Intention	Sept 2016			Feb 2017		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	96	8	43	92	8	39
Leave	2	88	32	7	88	28
Would Not Vote	2	4	25	2	3	33
Vote Intention	**July 2017**			**Oct 2017**		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	93	10	50	90	10	48
Leave	4	88	26	9	84	28
Would Not Vote	3	3	23	1	6	24
Vote Intention	**June 2018**			**Feb 2019**		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	90	12	49	89	13	56
Leave	6	82	24	8	79	19
Would Not Vote	4	6	27	3	8	25

Table 15: Continued

Vote Intention	Mar 2019			Sept 2019		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	87	14	50	87	13	50
Leave	7	74	22	7	77	24
Would Not Vote	6	12	29	6	10	26
Vote Intention	**Nov/Dec 2019**			**Feb 2020**		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	91	11	58	88	11	49
Leave	7	83	19	7	84	24
Would Not Vote	2	7	23	4	5	27
Vote Intention	**July 2020**			**Jan 2021**		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Remain	87	10	48	86	9	46
Leave	7	80	20	8	78	23
Would Not Vote	6	9	31	6	13	30
Vote Intention	**Aug 2021**					
	Remain	Leave	Abstained			
	%	%	%			
Remain	83	9	51			
Leave	9	81	17			
Would Not Vote	8	10	32			

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.

Although there has only been a modest turnover of preferences among those who voted in 2016, we should bear in mind that not everyone voted (including in some instances because they were too young to do so). While nearly one in three (32%) say that they would not vote in another referendum, among those that do express a preference those who say that they would vote Remain have consistently outnumbered those who say they would back Leave – and in our latest survey they do so by nearly three to one. Nevertheless, if we take these people's views on board by analysing attitudes towards the Brexit deal by current Brexit preference instead of 2016 vote, the balance of opinion among Remain and Leave supporters is much the same as that observed at Table 2 above. Nearly two-thirds (65%) of current Remain supporters say that the Brexit deal is a bad one and only 6% that it is good. Meanwhile, even among those who currently back Leave slightly less than a quarter feel that the UK government has secured a good deal while around a third (34%) feel it is a bad one.

Even so, among those who did vote in 2016 there is a relationship between their evaluation of the deal that the UK has secured and the probability that they have changed their mind since. This is especially true of Remain voters. Nearly three quarters (73%) of those who would still vote Remain say that the UK has obtained a bad deal, compared with just 29% of those who would now switch to Leave. Conversely, among those Remain voters who think that the UK has obtained a good deal, 29% say that they would now vote Leave, compared with just 4% of those Remain voters who feel the UK has a bad deal. Meanwhile, among those who voted Leave and would still do so again, a quarter (25%) believe that the UK has obtained a good deal, compared with just 9% of those who would now vote Remain. This reflects the fact that while 91% of those Leave voters who believe the UK has obtained a good deal would vote Leave again, the proportion falls to 78% among those who believe it has a bad deal. Evidently people's views about the principle of Brexit do not simply hinge on their view of the deal that has been obtained (even leaving aside the fact that perceptions of the deal may in some instances be a consequence of a change of mind about the principle of Brexit rather than vice-versa), but, other things being equal, the relatively widespread negative evaluation of the Brexit deal is serving to ensure that, rather than accepting that Brexit has now been done, the country continues to be divided between those who back Brexit and those who do not.

Indeed, that the public still seems to be as divided now about the decision that was made five years ago as it was then is confirmed by Table 16, which shows what our data suggest the outcome of a second referendum on whether to Remain or Leave would be. Throughout the last five years our readings have pointed to a small majority in favour of Remain, much as the opinion polls have also suggested (Curtice, 2020b; 2021). Arguably, however, the more crucial point is that opinion has never swung decisively in one direction or the other. Indeed, our latest survey suggests that the 52% who would support Remain are nearly counterbalanced by the 48% who would back Leave.

Table 16: Extrapolated Hypothetical Repeat Referendum Vote, September 2016 – August 2021

Extrapolated Repeat Referendum Vote	2016	2017			2018	2019
	Sept	Feb	July	Oct	June	Feb
	%	%	%	%	%	%
Remain	52	51	52	52	54	55
Leave	48	49	48	48	46	45

	2019			2020		2021	
	Mar	Sept	Nov/Dec	Feb	July	Jan	Aug
	%	%	%	%	%	%	%
Remain	55	54	55	53	54	53	52
Leave	45	46	45	47	46	47	48

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.

That said, following the implementation of Brexit, the choice that would now face the UK in any future referendum is not between Remain and Leave but, rather, whether to re-join or stay out of the EU. Perhaps many of those who would still vote Remain would, nevertheless, accept that now that Brexit has happened Britain should make the best of the deal that it has obtained.

Table 17 suggests that view is not entirely absent. Whereas (see Table 15) in our latest survey 83% of Remain voters say that they would vote to Remain, only 78% would vote to re-join. In contrast, at 82%, the proportion of Leave voters who would vote to stay out matches the 81% who would vote to Leave.[3] As a result, the balance of opinion in our latest survey on re-joining versus staying out is tilted somewhat in favour of staying out (by 53% to 47%), though on this question also the Brexit divide still looks to be evenly balanced.

Table 17: Hypothetical Alternative Referendum Vote by Reported Referendum Vote, July 2020 – August 2021

2016 Vote	July 2020			January 2021		
	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%
Re-join	80	8	49	79	8	47
Stay out	13	84	22	15	83	26
Would not vote	7	8	29	7	8	26

	August 2021		
	Remain	Leave	Abstained
	%	%	%
Re-join	78	9	50
Stay out	15	82	20
Would not vote	7	9	30

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.

CONCLUSION

One of the difficulties facing the implementation of any government policy is that it is at risk of being criticised from two directions – those opposed to the policy in principle and those who dislike the way it has been implemented in practice. That seems to be the fate that has befallen the Brexit deal. Those on the Remain side of the Brexit debate are relatively united in their dislike of an outcome whose principal objective is one that they oppose in the first place. They are not, however, opposed by an equally united flank of Leave supporters who are pleased with the outcome of the Brexit talks. Some it seems would have preferred a softer Brexit, while yet others apparently feel that the UK is still tied too closely to the EU's orbit. This outcome has perhaps been exacerbated by the fact that one of the principal consequences of Brexit – an end to freedom of movement – no longer has the resonance that it did at the time of the referendum. And perhaps too the chequered history of the Brexit process – and the differences between pro-

3 If we analyse people's attitude to re-joining versus staying out by their current preference for Remain versus Leave, we find that while 96% of current Leave supporters would vote to stay out, 93% of Remain supporters would back re-join. Among Remain supporters at least there is little link between their view of the deal and willingness to vote to re-join. While 65% of those who would vote to re-join say that the UK has obtained a good deal, so also do 61% of those who would vote to stay out. There are too few Leave supporters who would vote to re-join to undertake a similar analysis for this group.

Leave politicians that it exposed – has long ago left Leave voters wary of what the negotiations would achieve. In any event, it means that the success of the government that was elected in 2019 to 'get Brexit done' has not been greeted with the plaudits for which it might have hoped.

True, it seems that the lukewarm response of Leave voters towards the Brexit deal may not have had a substantial impact on the level of support for leaving the EU. But the fact that the deal is not one that has won over many hearts and minds on the Remain side of the argument is probably helping to ensure that the public continues to be divided over the principle of Brexit, even though the issue is not currently being pursued by either the Labour or the Liberal Democrat opposition. Maybe in the end the issue will eventually drop off the voters' agenda – but the Brexit deal the government has secured has not necessarily ensured that that will prove to be the case.

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