What UK Thinks EU

HAS BREXIT BEEN A SUCCESS? THE PUBLIC'S PERSPECTIVE

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UK IN A CHANGING EUROPE

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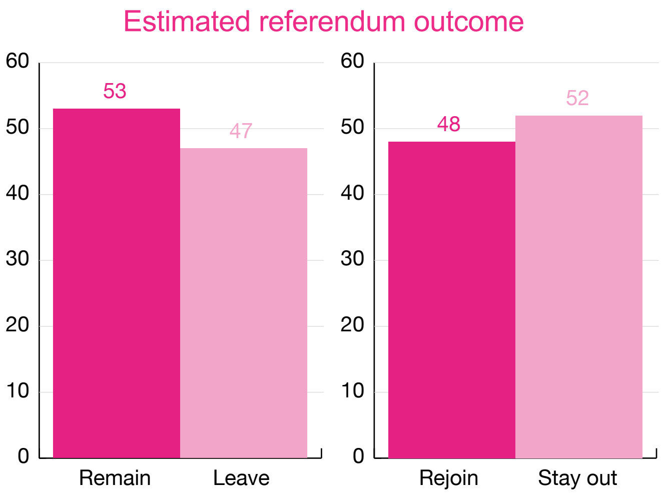
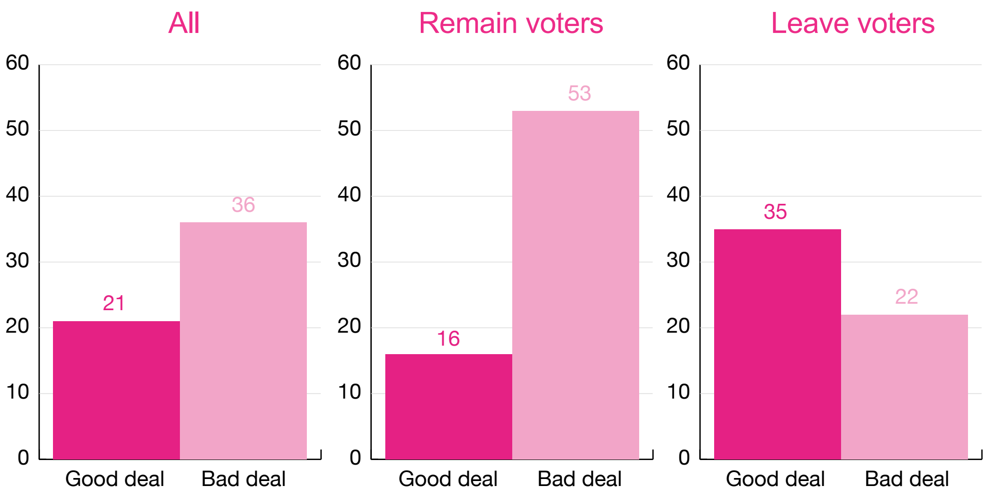
SUMMARY

This paper assesses the success, so far as public opinion is concerned, of the EU referendum held five years ago this month. Using a unique collection of NatCen panel surveys conducted throughout the last five years, it examines first of all whether individual voters have changed their minds about Brexit and whether collectively there has continued to be majority support for leaving the EU. Thereafter, we analyse how well voters believe the instructions they gave at the referendum have been executed, focusing in particular on how good or bad a deal the UK is thought to have secured from the Brexit negotiations. Finally, we ask whether voters still envisage that leaving the EU will have much the same consequences as they had anticipated when they cast their referendum ballots.

1. Britain is still evenly divided on the principle of leaving the EU

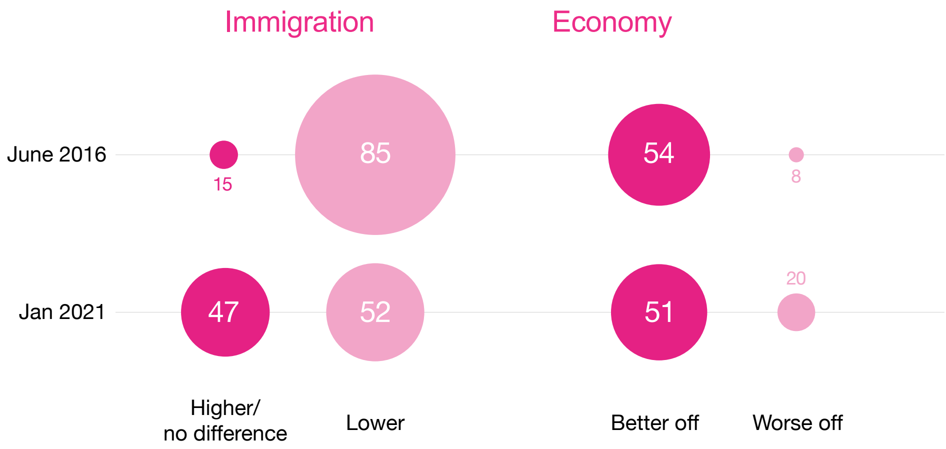


2. There is limited enthusiasm for the deal that the UK has obtained from the Brexit negotiations



SUMMARY (CONT)

3. Many Leave voters still expect Brexit to result in less immigration and a better economy



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INTRODUCTION

It is now five years since voters in the UK voted by 52% to 48% to leave the EU. It was one of the most important public policy decisions since 1945. Meanwhile, the process of exiting proved to be even more fraught and controversial than the debate before the referendum (Grey, 2021). It witnessed a parliamentary stalemate on the terms of the country's withdrawal that was only eventually resolved after a change of Prime Minister and a second general election on the subject. It was only at the very end of 2020 that the process of leaving the EU finally came to the end when the UK left the EU single market after having negotiated (at the last minute) a free trade deal with the EU.

Given it was voters who made the decision to leave, how they have reacted to the events and developments of the last five years is of importance to any evaluation of the success or otherwise of the Brexit process. If it is to be regarded as a success, Leave voters should above all still be content with their original decision to leave – and that even many of those who voted to Remain have now perhaps come to accept the decision. At the same time, voters should also feel that their instructions have been faithfully executed. Meanwhile, they would also be expected to feel much the same way about the likely consequences of their decision as they did five years ago. Only if these three criteria are satisfied can we reasonably conclude that the referendum was an effective example of the use of direct democracy.

In this paper, we assess how well these three criteria have been met by analysing a unique series of a dozen surveys that have been conducted over the course of the last five years. The first survey was undertaken in September 2016, just weeks after the EU referendum, while the most recent was fielded earlier this year, just weeks after the UK left the single market. Between them these surveys provide a unique body of evidence on how the public's hopes and expectations have changed since the referendum. All of the surveys, which apart from the first all interviewed at least 2,000 people, have been undertaken via NatCen's mixed mode random probability panel, which comprises people who were originally selected for interview as part of the annual British Social Attitudes series and who have agreed to participate in further follow-up interviews, usually online but in some instances by phone. The panel, of which further details are given in Jessop (2018), is the first online panel to have been established in the UK whose members have been selected at random rather than recruited via calls for people to join.

ARE VOTERS CONTENT WITH THEIR DECISION?

For the most part, those who voted in the EU referendum have largely not changed their minds (see Table 1). True, there has been some sign that the proportion who say they would have voted the same way has declined somewhat over time. Back in the autumn of 2016, as many as 96% of Remain voters and 88% of Leave supporters said they would have voted the same way again. In contrast, in our most recent survey the figures are 86% and 78% respectively. Even so, this still means that, despite all the intervening controversies, over four in five (82%) of those who voted in 2016 would still vote the same way again.

Table 1: Vote Intention in a Second EU Referendum by Reported Referendum Vote, September 2016-January 2021

Vote intention	Sept 2016			Feb 2017			July 2017		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%	%	%	%
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

Vote intention	Oct 2017			June 2018			Feb 2019		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%	%	%	%
Remain	90	10	48	90	12	49	89	13	56
Leave	9	84	28	6	82	24	8	79	19
Would not vote	1	6	24	4	6	27	3	8	25

Vote intention	Mar 2019			Sept 2019			Nov/Dec 2019		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%	%	%	%
Remain	87	14	50	87	13	50	91	11	58
Leave	7	74	22	7	77	24	7	83	19
Would not vote	6	12	29	6	10	26	2	7	23

Vote intention	Feb 2020			July 2020			Jan 2021		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
	%	%	%	%	%	%	%	%	%
Remain	88	11	49	87	10	48	86	9	46
Leave	7	84	24	7	80	20	8	78	23
Would not vote	4	5	27	6	9	31	6	13	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.

That said, throughout the last five years Leave voters have been somewhat less likely than their Remain counterparts to say that they would vote the same way again – though this has been as much because they were more likely to say that they would not vote a second time around as it has been because they were more likely than Remain voters to say they would now vote the opposite way. But this inevitably raises questions about whether the majority secured by Leave in June 2016 has withstood the test of time.

Indeed, further reason to ask whether this is the case is to be found when we examine the preferences of those who did not vote in 2016. Although each time between 25-30% or so of this group have said that they would not vote in a second EU referendum, among the remainder there has been a consistent lead for Remain over Leave. True, at 46% Remain, 23% Leave, the gap in our more recent survey is somewhat lower than it has been at any point during the last three years, but there are still question marks over whether the outcome of the 2016 referendum has necessarily reflected the majority view thereafter.

Table 2: Extrapolated Hypothetical Repeat Referendum Vote, September 2016-January 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

Extrapolated repeat referendum vote	2019			2020		2021
	Mar	Sept	Nov/ Dec	Feb	July	Jan
	%	%	%	w%	%	%
Remain	55	54	55	53	54	53
Leave	45	46	45	47	46	47

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.

Table 2 underlines the point. It shows the estimated outcome of a second referendum to which our data point after applying to the actual referendum result the net swing in support from Remain to Leave registered by our surveys. For each survey this calculation has pointed to the prospect of a majority for Remain, albeit usually no more than a narrow one. Five years on, the British public are clearly still more or less evenly divided between supporters of Remain and backers of Leave, while it may well be the case that Remain supporters slightly outnumber their Leave counterparts.

Of course, having now left the EU, Remain or Leave is no longer the choice that faces the UK. Moreover, it may be the case that some of those who say they would still vote Remain now take the view that what is done is done and that it would not be worth unpicking the decision to leave the EU. Thus, in our last two surveys we have also asked our respondents how they would vote if faced with the choice between staying out of or rejoining the EU.

Table 3 reveals that not all voters respond to this question in the same way as they do the choice between Remain and Leave. Only around four in five (79-80%) of those who voted Remain in 2016 say that they would vote to rejoin the EU, whereas 86-87% said they would vote Remain again. Conversely, around 83-84% of Leave supporters would back staying out of the EU, rather more than the 78-80% who would vote Leave once more. On the other hand, the balance of opinion among those who did not vote in 2016 is much the same in response to this question as it is to the choice between Remain versus Leave (see Table 1). Even so, if we undertake the same calculation as in Table 2, our figures point to a narrow majority of 51% (in July) to 52% (in January) in favour of staying out. Exactly where the balance of opinion on Brexit now lies can thus be disputed, depending on what survey question is asked, but the one conclusion to which all the evidence points is that Britain is more or less evenly divided on the issue, just as it was five years ago.

Table 3: Hypothetical Alternative Referendum Vote by Reported Referendum Vote, July 2020 and January 2021

	July 2020			January 2021		
	Remain	Leave	Did not vote	Remain	Leave	Did not vote
	%	%	%	%	%	%
Rejoin	80	8	49	79	8	48
Stay out	13	84	22	15	83	26
Would not vote	7	8	29	7	8	26

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.

A GOOD DEAL?

But how well do voters think the instruction that was given in June has been executed? Perhaps the most obvious way of addressing this question is to examine how good or bad a deal people have felt that Britain was likely to get out of the talks between the UK and the EU – and indeed how they feel about the one that has now eventually been secured. Table 4 shows how people's expectations of the kind of deal that would emerge have developed during the course of the last five years.

Table 4: Evaluations/Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks, February 2017-January 2021

	2017			2018	2019
	Feb	July	Oct	June	Feb
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**

	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
Expect Britain to get a..	%	%	%	%	%
Good deal	6	11	17	12	21
Neither good nor bad	26	31	40	39	43
Bad deal	66	54	41	46	36
Net: good-bad	**-60**	**-43**	**-34**	**-34**	**-15**

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 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?*

There has never been a widespread expectation that Britain would secure a good deal. Even when we first asked the question in early 2017, slightly more expected Britain to get a bad deal (37%) than anticipated a good one (33%). However, for a long time thereafter pessimism seemed to become increasingly widespread, reaching its height during the midst of the parliamentary stalemate that prevailed for most of 2019 – a trend that only began to be reversed after Boris Johnson had negotiated a revised version of the withdrawal agreement in October 2019, a development that was soon followed by the calling of the 2019 general election. Still, the mood became markedly less dark after the free trade agreement with the EU was reached and Brexit had been completed. That said, even at this stage it was still the case that those who thought the UK had been left with a bad deal (36%) clearly outnumbered those who reckoned it had obtained a good one (21%).

Table 5: Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks by EU Referendum Vote, February 2017-January 2021.

Voted Remain 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
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
Net: good-bad	**-39**	**-41**	**-57**	**-63**	**-58**

Voted Remain 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
Expect Britain to get a..	%	%	%	%	%
Good deal	3	7	8	6	16
Neither good nor bad	18	25	31	24	30
Bad deal	77	66	59	70	53
Net: good-bad	**-74**	**-59**	**-51**	**-64**	**-37**

Voted Leave 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
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
Net: good-bad	**+30**	**+13**	**-9**	**-14**	**-60**

Voted Leave 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
Expect Britain to get a..	%	%	%	%	%
Good deal	8	16	27	23	35
Neither good nor bad	32	34	44	46	43
Bad deal	57	46	26	28	22
Net: good-bad	**-49**	**-30**	**+1**	**-5**	**+13**

However, it may be argued that it makes little sense to look at the views of the public as a whole as to how good or bad a deal the UK was securing. It might be felt that those who voted Remain are likely to regard any deal unfavourably because they are opposed to the principle of Brexit in the first place. What matters is whether those who voted for Brexit feel that the UK has obtained a good deal.

Table 5, which shows the views on the subject of Remain and Leave voters separately, confirms our expectation that Remain voters have largely been pessimistic about the deal the UK was likely to secure. For most of the last five years fewer than one in ten have thought that the UK would obtain a good deal. That said, the final deal that was secured at the end of 2020 does seem to have assuaged the concerns of some Remain voters. At 53%, the proportion who thought that the UK had obtained a bad deal was lower than at any stage since the referendum. Part of the explanation at least may be that leaving on the basis of the deal that had been negotiated was regarded as better than not having a trade deal at all. According to our most recent survey no less than nine in ten Remain voters believed that leaving on the basis of the trade deal that had been struck was either 'definitely' (36%) or 'probably' (55%) better than having done so without a deal at all.

For Leave voters, in contrast, the Brexit process has been something of a roller coaster. Early on, many reckoned the UK would secure a good deal; in early 2017 as many as a half (50%) expressed that view while just one in five (20%) thought the UK would obtain a bad deal. However, by the time in November 2018 that the UK government had unveiled the withdrawal treaty it had negotiated with the EU – and that treaty had subsequently been rejected by the House of Commons – Leave voters were just as pessimistic as Remain voters about the UK was going to secure. However, that mood was gradually reversed, such that by the time Boris Johnson had been able to 'get Brexit done' after renegotiating the withdrawal treaty and winning a general election, at least as many Leave voters thought that the UK would secure a good deal (27%) as believed it would find itself with a bad one (26%). The full and final deal as encapsulated in the free trade agreement, is regarded by 35% of Leave voters as representing a good deal while just 22% felt that it was a bad one.

Still, this was far from a ringing endorsement of the final deal by those who had instigated the Brexit process. In truth, a significant minority of Leave voters reckoned it would have been better to have left without a deal rather than on the basis of the trade deal that had been negotiated. According to our most recent survey, nearly one in four felt that it would either have 'definitely' (6%) or 'probably' (18%) have been better to have left without a deal. Among this group, opinion was roughly evenly divided between those who felt that the UK had obtained a good deal (28%) and those who thought it had secured a bad one (30%). In contrast, among the remaining three-quarters of Leave voters, approaching twice as many (37%) felt that the deal was a good one as believed it was a bad one (20%).

Indeed, perhaps one of the reasons why only one in five of all voters believe that Britain has obtained a good deal is that for many Leave voters it still leaves the UK more closely aligned with the EU than they would like, while for many Remain supporters the new relationship looks set to be too distant for their liking. In our more recent surveys we have asked respondents (i) how close or distant they think the UK's relationship with the EU should be in future and (ii) how close or distant they believe it will be. Table 6 reveals that consistently around two in three voters have said that they would prefer a close relationship with the EU. Yet as Table 7 indicates, typically only around one in three have said that they expect a close relationship to emerge. Many voters appear to have felt that the UK was heading for a more distant relationship than they thought was desirable.

Table 6: Preferred Closeness of Relationship between the UK and the EU, March 2019-January 2021

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

Table 7: Expected Closeness of Relationship between the UK and the EU, November 2019-January 2021

	2019	2020		2021
Relationship will be..	**Nov/Dec**	**Feb**	**July**	**Jan**
	%	%	%	%
Very close	3	2	2	2
Fairly close	31	29	23	32
Neither close nor distant	31	39	38	36
Fairly distant	29	25	32	27
Very distant	5	4	6	2

Nov/Dec 2019 & Feb 2020: *How close or distant do you think the UK's relationship with the EU will be in future if the UK leaves on the basis of the deal that has been negotiated?* July 2020 & Jan. 2021: Given the terms and conditions under which the UK has left the EU, how close or distant do you think the UK's relationship with the EU will be in future?

However, this gap was much wider among Remain voters than their Leave counterparts. As Table 8 shows, consistently over four in five Remain voters have said that they wanted a close relationship with the EU. Yet Table 9 reveals that never have more than one in three believed that the UK would have a close relationship with the EU, although the conclusion of a free trade agreement at the end of December 2020 appears to have persuaded some that the relationship would be somewhat closer than they had anticipated six months earlier – when only around one in five expected a close relationship. This gap between what they would prefer and what they anticipate might be thought to help explain why many Remain voters continue to believe that Britain has secured a bad deal.

Table 8: Preferred Closeness of Relationship between the UK and the EU by EU Referendum Vote, March 2019-January 2021

Voted Remain 2016	2019		2020		2021
Relationship should be..	Mar	Sept	Feb	July	Jan
	%	%	%	%	%
Very close	46	48	43	42	43
Fairly close	37	40	40	39	43
Neither close nor distant	13	8	10	13	10
Fairly distant	3	3	6	5	3
Very distant	*	1	1	*	1

Voted Leave 2016	2019		2020		2021
Relationship should be..	Mar	Sept	Feb	July	Jan
	%	%	%	%	%
Very close	9	9	10	6	9
Fairly close	36	43	49	49	49
Neither close nor distant	40	35	33	35	34
Fairly distant	10	10	8	9	7
Very distant	4	3	1	2	1

As we would anticipate, Leave voters, in contrast, have been less keen on a close relationship. Even so, typically over half have said that that would be their preferred outcome, albeit in most cases they were wanting a 'fairly close' rather than a 'very close' relationship. At the same time, Leave voters have been more likely than Remain supporters to say that the relationship will be close – though here too 'fairly close' has been the more popular option. True, it may be the case that what Leave voters regard as a close relationship is in practice more distant than what many Remain voters would consider as close. Nevertheless, this does not negate the observation that Leave voters are more likely to believe that the deal that the UK has secured matches their own preferences. This can be seen if in our most recent survey we compare our individual participants' preferred relationship with the one that they expect. This reveals that for as many as 57% of Leave voters the relationship they anticipate is the same as the one they prefer, while only 36% say it will be more distant. In contrast, just 28% of Remain voters expect Britain's future relationship with the EU to match their preferences, while 69% believe it will be more distant.[1]

1 Only 8% of Leave voters and just 3% of Remain supporters believe the relationship will be closer than they would prefer.

Table 9: Expected Closeness of Relationship between the UK and the EU by EU Referendum Vote, November 2019-January 2021

Voted Remain 2016	2019	2020		2021
Relationship will be..	Nov/Dec	Feb	July	Jan
	%	%	%	%
Very close	2	3	1	2
Fairly close	26	23	18	31
Neither close nor distant	28	35	30	41
Fairly distant	38	32	42	21
Very distant	6	6	9	3

Voted Leave 2016	2019	2020		2021
Relationship will be..	Nov/Dec	Feb	July	Jan
	%	%	%	%
Very close	4	3	2	1
Fairly close	47	38	31	40
Neither close nor distant	33	41	41	37
Fairly distant	14	15	21	20
Very distant	2	2	3	1

The difference between what Remain voters would like and what they anticipate is clearly related to their evaluation of the final deal. Among those Remain voters who expect the future relationship to be in line with their own preference, almost as many feel that the final deal is a good one (29%) as believe it is bad (30%). Though they are still not as keen on the deal as Leave voters who expect the relationship between the UK and EU to match their own preference (40% of whom think the deal is a good one), those Remain voters who do expect the UK's relationship to be as close to the EU as they would like appear to have been willing to some degree to accommodate themselves to the outcome of the Brexit negotiations.[2] In contrast, among the 41% of Remain voters who feel that the UK's future relationship with the EU will be markedly more distant than they would like – that is, their anticipated outcome on our five-point scale is at least two categories apart from their preference – no less than 75% believe the deal between the UK and the EU is a bad one.

However, for Leave voters the character of Britain's future relationship with the EU seems to matter less to their view of the deal. The minority of Leave voters who feel that the future relationship will be more distant than they would like are only a little more likely (29%) than those for whom their anticipated outcome matches their preference (18%) to say that the deal is bad (29%). For them, perhaps, the detail of Brexit matters less than the principle.

2 It is also the case that among those Remain voters who say they would vote Remain a second time around, 12% of those whose perception of the UK's future relationship with the EU matches their preference say that they would vote to stay out of the EU rather than rejoin. In contrast, only 4% of those whose perception is markedly different from their perception say that they would vote to rejoin.

EXECUTING THE MANDATE

If for the most part the deal that the UK has secured from the EU has been greeted with limited enthusiasm by voters, does this mean that voters are critical of how the two partners to the talks have handled the negotiations? Do they feel that the UK has failed to handle the negotiations well – and thus by implication believe that the government they instructed in the referendum has not been up to the task of delivering a good Brexit deal? Or are they more inclined to be critical of the EU, who of course were under no obligation to meet the expectations of those who had voted for Brexit yet whose collaboration was necessary if whatever voters regarded as a 'good deal' was to be secured (Curtice, 2019)?

Table 10 reveals that throughout the Brexit process voters have, on balance, been critical of both the UK government and the EU. However, perceptions of the UK government's handling have varied more over time than have those of the EU. Voters gradually became more critical of both parties as the negotiations began to make only slow progress in the second half of 2017 and during much of 2018. However, disenchantment with the performance of the UK government became almost universal after the initial version of the withdrawal treaty had been rejected by the Commons in January 2019 – as many as 81% said that the UK government was handling Brexit badly, a figure that rose to as high as 88% as the parliamentary stalemate over Brexit continued through to the autumn of that year. In contrast, at this point the proportion who thought the EU was handling things badly had only risen to a more modest 65%. However, once Brexit had been delivered, the proportion who felt that the UK government was handling Brexit badly fell back to around 50%, only slightly higher than the proportion who said the same about the EU.

Table 10: Perceptions of How Well/Badly the UK and the EU have Handled Brexit, February 2017-January 2021

a) UK government handling Brexit

UK government handling Brexit..	2017			2018	2019
	Feb	July	Oct	June	Feb
	%	%	%	%	%
Well	29	19	15	13	7
Neither well nor badly	28	25	24	22	11
Badly	41	55	61	64	81

UK government handling Brexit..	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
	%	%	%	%	%
Well	4	9	24	19	22
Neither well nor badly	8	8	22	30	24
Badly	88	82	53	50	54

b) EU handling Brexit

EU handling Brexit..	2017			2018	2019
	Feb	July	Oct	June	Feb
	%	%	%	%	%
Well	17	21	17	16	16
Neither well nor badly	35	31	25	25	22
Badly	46	47	57	57	61

EU handling Brexit..	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
	%	%	%	%	%
Well	14	22	23	n/a	21
Neither well nor badly	20	23	32	n/a	31
Badly	65	53	44	n/a	48

Except in January 2021: *Would you say that the UK government/the EU is handling the UK's exit from the EU well or badly?*
In January 2021: *Would you say that the UK government/the EU has handled the UK's exit from the EU well or badly?*

Still, it seems that on balance both institutions have found it difficult to secure the confidence of the public in how they were managing Brexit. But, of course, it may be that Remain voters were inclined to blame the UK government (for a Brexit they did not want), while Leave supporters were more inclined to blame the EU (as an institution in which they had little faith in the first place). Yet, in practice, the picture has been more complicated than this. As Table 11 reveals, early on in the Brexit process Leave voters were indeed inclined to the view that the UK government was handling things well, while the opposite was true of Remain supporters. Yet the longer the process went on without reaching a conclusion, the more that Leave voters in particular became critical of the UK government's role, such that by the beginning of 2019 there was little difference between their views and those of (also now more critical) Remain supporters. However, once the UK had left the EU in January 2020, Leave voters were more likely to say that the UK has handled Brexit well, while Remain supporters were only a little less critical than they were at the height of the parliamentary stalemate in 2019. In short, the confidence that Leave voters had in the UK government was badly shaken when it appeared that Brexit might not happen, but it has now largely been restored. In contrast Remain voters have been left feeling even more critical of the UK government than they had been early on in the Brexit process.

Table 11: Perceptions of How Well/Badly the UK has Handled Brexit by EU Referendum Vote, February 2017-January 2021

Voted Remain 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
UK government handling Brexit..	%	%	%	%	%
Well	18	10	9	9	5
Neither well nor badly	26	21	19	16	10
Badly	55	68	71	76	85

Voted Remain 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
UK government handling Brexit..	%	%	%	%	%
Well	1	4	11	7	11
Neither well nor badly	4	6	18	19	15
Badly	94	90	71	74	74

Voted Leave 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
UK government handling Brexit..	%	%	%	%	%
Well	42	28	21	21	10
Neither well nor badly	29	32	28	24	9
Badly	27	39	50	53	80

Voted Leave 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
UK government handling Brexit..	%	%	%	%	%
Well	8	14	45	38	42
Neither well nor badly	7	10	21	32	23
Badly	84	76	33	29	35

On the EU's handling of Brexit, however, Leave voters have, as we anticipated, always been more inclined than their Remain counterparts to be critical of its role, though even Remain voters were more likely to say the EU were handling Brexit badly than they were to say it was doing so well (see Table 12). However, as the Brexit process stalled, Leave voters became more critical of the EU – and indeed were almost as critical of the EU as they were of the UK government at this time – a pattern that was not replicated among Remain voters, who evidently were more likely to feel that the UK government bore responsibility for the impasse that had developed. Meanwhile, now that Brexit has been delivered Leave voters are still relatively critical of the EU, whereas Remain voters have become somewhat less so. In line with their reaction earlier in the Brexit process, for them responsibility for a deal that most do not like appears to rest primarily with the UK government.

Support for this last supposition is also to be found in the relationship in our most recent survey between Remain voters' perceptions of how good or bad a deal the UK has obtained and their evaluations of how well the UK and the EU have handled the UK's withdrawal. Nearly four in five (79%) of those Remain voters who think the UK has handled Brexit badly think that the UK has secured a bad deal, whereas two-thirds of those who think the UK has handled Brexit well feel that the country has obtained a good deal. In contrast, Remain voters' evaluations of how well the EU have handled Brexit appear to be immaterial to their view of the deal. While 58% of those Remain voters who think that the EU has handled Brexit badly believe that the deal itself is bad, so also do 56% of those who reckon the EU has managed things well.

The pattern among Leave voters is very different. How well or badly the EU is thought to have handled Brexit is almost as strongly related to people's evaluations of the deal as are their perceptions of how well or badly the UK is thought to have managed its exit.[3] Perhaps what matters for Leave voters is not so much the performance of the individual parties to the talks as their evaluation of the withdrawal process as a whole.

3 Among Leave voters, 64% of those who think that the UK government had handled Brexit well say that the deal that the UK has obtained is good, compared with just 13% of those who feel the UK government had managed the issue badly. The equivalent figures for those who think the EU has handled Brexit well/badly are 68% and 27% respectively.

Table 12: Perceptions of How Well/Badly the EU has Handled Brexit by EU Referendum Vote, February 2017-January 2021

Voted Remain 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
EU handling Brexit..	%	%	%	%	%
Well	17	26	22	22	24
Neither well nor badly	38	33	27	29	26
Badly	42	38	50	49	49

Voted Remain 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
EU handling Brexit..	%	%	%	%	%
Well	24	34	33	n/a	28
Neither well nor badly	24	30	33	n/a	30
Badly	51	36	32	n/a	42

Voted Leave 2016	2017			2018	2019
	Feb	July	Oct	June	Feb
EU handling Brexit..	%	%	%	%	%
Well	16	15	10	11	8
Neither well nor badly	28	28	19	18	12
Badly	55	56	71	69	79

Voted Leave 2016	2019		2020		2021
	Sept	Nov/Dec	Feb	July	Jan
EU handling Brexit..	%	%	%	%	%
Well	6	13	17	n/a	16
Neither well nor badly	10	12	25	n/a	22
Badly	83	74	57	n/a	62

CONSEQUENCES

What, however, do voters now think the consequences of Brexit? Are their expectations much the same as they were at the beginning of the Brexit process? Or is there reason to believe that voters now have rather different expectations of what Brexit will bring? We address these questions by looking at the evolution of voters' attitudes towards two of the central issues in the referendum campaign – immigration and the economy (Curtice, 2017; Clarke et al., 2017; Sobolewska and Ford, 2020).

In a survey conducted via the NatCen panel shortly before the referendum (Cabrera-Alvarez et al., 2016), there was a widespread expectation that immigration would be lower if Britain voted to leave the EU (see Table 13). As many as two-thirds thought that is what would happen. However, no sooner was the referendum over, and this expectation became rather less widespread, and thereafter it consistently hovered at or around the 40% mark until after the UK left the EU at the end of January 2020. Since then, two of our surveys, including the most recent, has put the figure at or around 45%, suggesting that the outcome of the Brexit process – including the introduction of a new immigration system – has served to increase somewhat the expectation that leaving the EU will result in lower levels of immigration.

Table 13: Expectations of the Consequences of Leaving the EU for the Level of Immigration, June 2016-January 2021

Expect Brexit to mean immigration will be..	2016		2017			2018
	June	Sept	Feb	July	Oct	June
	%	%	%	%	%	%
Higher	7	7	7	9	7	7
Not much difference	28	53	48	52	50	53
Lower	64	38	43	39	43	38
Net: lower-higher	**+57**	**+31**	**+36**	**+30**	**+36**	**+31**

Expect Brexit to mean immigration will be..	2019				2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
	%	%	%	%	%	%	%
Higher	9	7	5	7	7	8	8
Not much difference	50	57	54	53	47	54	46
Lower	39	35	40	38	45	36	46
Net: lower-higher	**+30**	**+28**	**+35**	**+31**	**+38**	**+28**	**+38**

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-July 2020: *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?*

Moreover, the distribution of attitudes among Remain and Leave voters have converged somewhat on this topic. Table 14 reveals that at the time of the referendum campaign, there was a widespread expectation among Leave voters that immigration would be lower as a result of Brexit, and, while that mood did not last much beyond the referendum itself, in the first couple of years of the Brexit process Leave voters were still much more likely than Remain supporters to believe that Brexit would result in lower levels of immigration. In the autumn of 2017, for example, 55% of Leave voters thought that immigration would be lower, compared with only 36% of Remain supporters. However, while thereafter the proportion of Remain voters who expected immigration to fall stayed at around a third (after having been nearly half at the time of the referendum), the figure among Leave voters fell further, reaching a low of 40% in March 2019. More recently, the proportion of Leave voters has risen to over a half once more, but at the same time, more than 40% of Remain voters are now expecting immigration to be lower too.

Table 14: Expectations of the Consequences of Leaving the EU for the Level of Immigration by EU Referendum Vote, June 2016-January 2021

Voted Remain 2016	2016		2017			2018
	June	Sept	Feb	July	Oct	June
Expect Brexit to mean immigration will be..	%	%	%	%	%	%
Higher	11	7	8	9	8	5
Not much difference	41	67	58	60	57	57
Lower	47	26	33	31	36	36

Voted Remain 2016	2019				2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
Expect Brexit to mean immigration will be..	%	%	%	%	%	%	%
Higher	8	7	5	6	7	7	6
Not much difference	57	61	59	59	50	55	49
Lower	35	31	35	34	43	37	44

Voted Leave 2016	2016		2017			2018
	June	Sept	Feb	July	Oct	June
Expect Brexit to mean immigration will be..	%	%	%	%	%	%
Higher	2	5	6	8	4	8
Not much difference	13	39	38	42	41	48
Lower	85	55	55	49	55	43

Voted Leave 2016	2019				2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
Expect Brexit to mean immigration will be..	%	%	%	%	%	%	%
Higher	7	6	4	6	6	8	7
Not much difference	44	53	49	46	42	51	40
Lower	48	40	46	46	52	40	52

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

Of course, it might be thought that Remain and Leave voters disagree about what level of immigration they would like in the first place. While lower migration might be regarded by Leave voters as a benefit, Remain supporters might consider it a downside of Brexit. However, Table 15 suggests that this argument cannot easily be sustained. The table shows how Remain and Leave voters have responded when asked whether the future relationship with the EU should include:

> ***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.***

Although less likely to support this proposition than Leave voters (among whom support has been running at around 80%), for much of the last five years around a half of Remain voters have agreed with a proposition that implies subjecting EU migrants to immigration control rather than allowing them freedom of movement. This suggests that for many Remain voters a potential reduction in immigration is regarded as one of the advantages of Brexit.

Table 15: Attitudes towards Freedom of Movement by EU Referendum Vote, September 2016-January 2021

Voted Remain 2016	2016	2017			2018	2019
	Sept	Feb	July	Oct	June	Feb
Treat EU migrants like non-EU	%	%	%	%	%	%
In favour	62	58	53	49	47	46
Neither	14	18	18	20	23	24
Against	24	23	27	31	30	29

Voted Remain 2016	2019			2020		2021
	Mar	Sept	Nov/Dec	Feb	July	Jan
Treat EU migrants like non-EU	%	%	%	%	%	%
In favour	50	48	47	48	48	47
Neither	18	20	18	20	24	22
Against	32	32	35	33	29	32

Voted Leave 2016	2016	2017			2018	2019
	Sept	Feb	July	Oct	June	Feb
Treat EU migrants like non-EU	%	%	%	%	%	%
In favour	89	82	83	82	75	80
Neither	8	11	8	10	15	11
Against	3	7	8	8	9	8

Voted Leave 2016	2019			2020		2021
	Mar	Sept	Nov/Dec	Feb	July	Jan
Treat EU migrants like non-EU	%	%	%	%	%	%
In favour	78	81	78	82	76	81
Neither	14	12	13	9	18	13
Against	8	6	9	8	6	6

However, if there is something approaching a consensus on the consequences of Brexit for the level of immigration, the same cannot be said of its anticipated impact on the economy. In truth, even before the Brexit referendum took place only around three in ten (29%) felt that the economy would be better off as a result of Brexit, while around four in ten (39%) felt it would be worse off (see Table 16). However, pessimism became markedly more widespread in the early months of the Brexit process, and by the end of 2017 the proportion who thought that the economy would be worse off rose to over a half (52%), and for the most part has remained at or above that level ever since. Even the conclusion of the free trade deal at the end of 2020 seems to have made little difference to the balance of people's expectations.

Table 16: Expectations of the Consequences of Leaving the EU for the Economy, June 2016-January 2021

Expect Brexit to mean economy will be..	2016		2017			2018
	June	Sept	Feb	July	Oct	June
	%	%	%	%	%	%
Better off	29	30	29	24	25	25
Not much difference	29	25	23	26	22	23
Worse off	39	45	46	49	52	51
Net: better off – worse off	**-10**	**-15**	**-17**	**-25**	**-27**	**-26**

Expect Brexit to mean economy will be..	2019				2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
	%	%	%	%	%	%	%
Better Off	19	19	20	21	26	21	25
Not much difference	22	23	23	22	22	28	22
Worse Off	58	56	55	56	50	49	53
Net: better off – worse off	**-39**	**-37**	**-35**	**-35**	**-24**	**-28**	**-28**

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-July 2020: *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?*

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

Table 17: Expectations of the Consequences of Leaving the EU for the Economy by EU Referendum Vote, June 2016-January 2021

Voted Remain 2016	2016		2017			2018
	June	Sept	Feb	July	Oct	June
Expect Brexit to mean economy will be..	%	%	%	%	%	%
Better Off	8	5	7	6	6	4
Not much difference	22	15	13	14	11	15
Worse Off	69	79	78	79	81	80

Voted Remain 2016	2019				2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
Expect Brexit to mean economy will be..	%	%	%	%	%	%	%
Better Off	4	4	4	5	6	4	6
Not much difference	12	13	11	11	14	16	11
Worse Off	83	82	84	84	79	80	83

Voted Leave 2016	2016		2017			2018
	June	Sept	Feb	July	Oct	June
Expect Brexit to mean economy will be..	%	%	%	%	%	%
Better Off	54	58	54	46	45	51
Not much difference	35	32	30	35	34	30
Worse Off	8	9	15	18	21	17

Voted Leave 2016		2019			2020		2021
	Feb	Mar	Sept	Nov/Dec	Feb	July	Jan
Expect Brexit to mean economy will be...	%	%	%	%	%	%	%
Better Off	41	39	40	46	56	46	51
Not much difference	32	34	35	32	29	36	28
Worse Off	25	26	24	21	15	18	20

In so far as the mood has changed, it has done so primarily among Leave supporters. For, as Table 17 shows, Remain voters have largely been consistently pessimistic about the economic consequences of Brexit – throughout the last five years around four in five have said that the economy would be worse off, even higher than the 69% who held that view before the referendum. Among Leave voters, in contrast, optimists have always outnumbered pessimists. However, the balance between the two narrowed towards the end of 2017, and has never returned to its previous level, primarily because a notable minority continued to say that the economy would be worse off. Even with the conclusion of the free trade agreement with the EU, only around a half of Leave voters (51%) believe that the economy will be better off as a result of leaving the EU, while one in five (20%) believe it will be worse off.[4]

Still, at the end of the Brexit negotiations just over a half of Leave voters feel that immigration will fall, while much the same proportion believe that the economy will be worse off. Although the proportion who expect a fall in immigration is well short of the height it was at during the referendum campaign, it is still much the same as it was shortly thereafter, while the proportion who expect the economy to be better off is much the same as it was five years ago. Meanwhile, those who think that immigration will fall are by no means those who necessarily think that the economy will be worse off. As a result, no less than three in four (75%) of those who voted Leave now expect either immigration to fall or that the economy will be better off. So while Remain voters are as pessimistic about the economic consequences of Brexit as they have ever been, it appears that many Leave voters still believe that Brexit will deliver at least some of what they were hoping for when they voted in the referendum.

CONCLUSION

Five years on, it is difficult to argue that the Brexit referendum has been an unalloyed success. True, although some had their doubts during the course of the Brexit stalemate, Leave voters' expectations of what Brexit will deliver in respect of immigration and the economy are not dissimilar to what they were when they voted five years ago. Nevertheless, their enthusiasm for the deal that has been reached with the EU is limited. A minority at least would have preferred to leave without a deal, while for others the deal is expected to produce a more distant relationship than they would like. But perhaps above all they have always been rather doubtful about what would emerge from a process involving the very institution, the EU, from whose influence they were hoping to escape, and a process in which their confidence was severely shaken by the Brexit stalemate that was only broken after Boris Johnson became Prime Minister.

Meanwhile, there is little sign that the outcome of the Brexit process has encouraged many Remain voters to accept what has happened. Although many of them may welcome the prospect of a reduction in immigration, they are even more sceptical of the economic consequences than they were five years ago. They might feel that the deal that has been reached with the EU was better than leaving without an agreement, but many believe that the UK's future relationship is going to be more distant than they would like. As a result, while a few would now vote to stay out of the EU, the vast majority of Remain voters would not only vote Remain again, but would also vote to rejoin the EU.

Indeed, whatever their doubts about the deal, most Leave voters would still vote the same way again too. It cannot be argued that many of them feel regret about the way that they voted. Nevertheless, there is still a question mark over whether there was still a majority for Brexit at the time that the UK left the EU, not simply because some Leave voters had changed their minds but also because those who did not vote in 2016 appear to have become markedly more likely to support Remain than Leave. Either way, Britain is certainly more or less evenly divided on the issue, just as it was five years ago – suggesting that there is still plenty of potential for the Brexit debate to continue.

4 This latter group accounts for much of the movement from Leave to Remain reported in Table 1. No less than one in three (33%) of those who voted Leave in 2016 but now feel that the economy would be worse off as a result of Brexit say that they would now vote Remain. In contrast, just 2% of those who think the economy would be better off and only 7% of those who believe it would not make much difference indicate that they would make that switch.

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