What UK Thinks EU

DO VOTERS STILL WANT TO LEAVE THE EU? HOW THEY VIEW THE BREXIT PROCESS TWO YEARS ON

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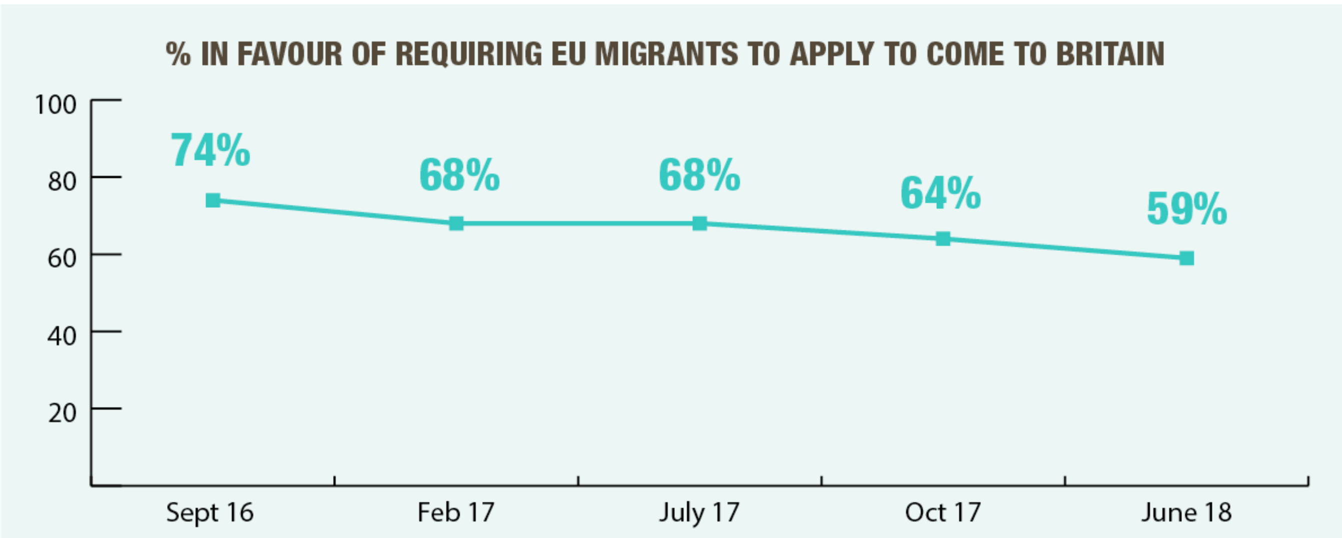
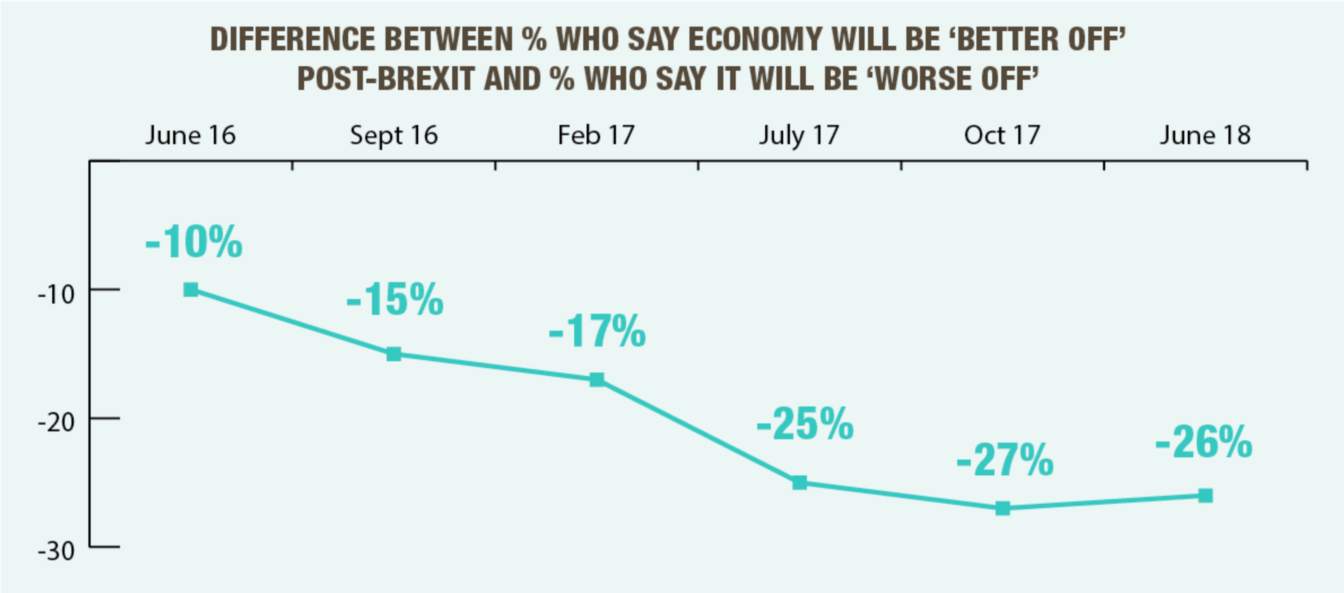
Do Voters Still Want To Leave The EU? How They View The Brexit Process Two Years On

The negotiations between the UK and the EU are due to reach a conclusion this autumn. But how have voters reacted to the Brexit process so far and what impact has that reaction had on support for leaving the EU? This paper reports on the latest findings of a two-year multi-wave study of public attitudes towards the Brexit process, examining which attitudes have and have not shifted during that time, and the implications of the shifts that have occurred for the willingness of people to vote Remain or Leave once again.

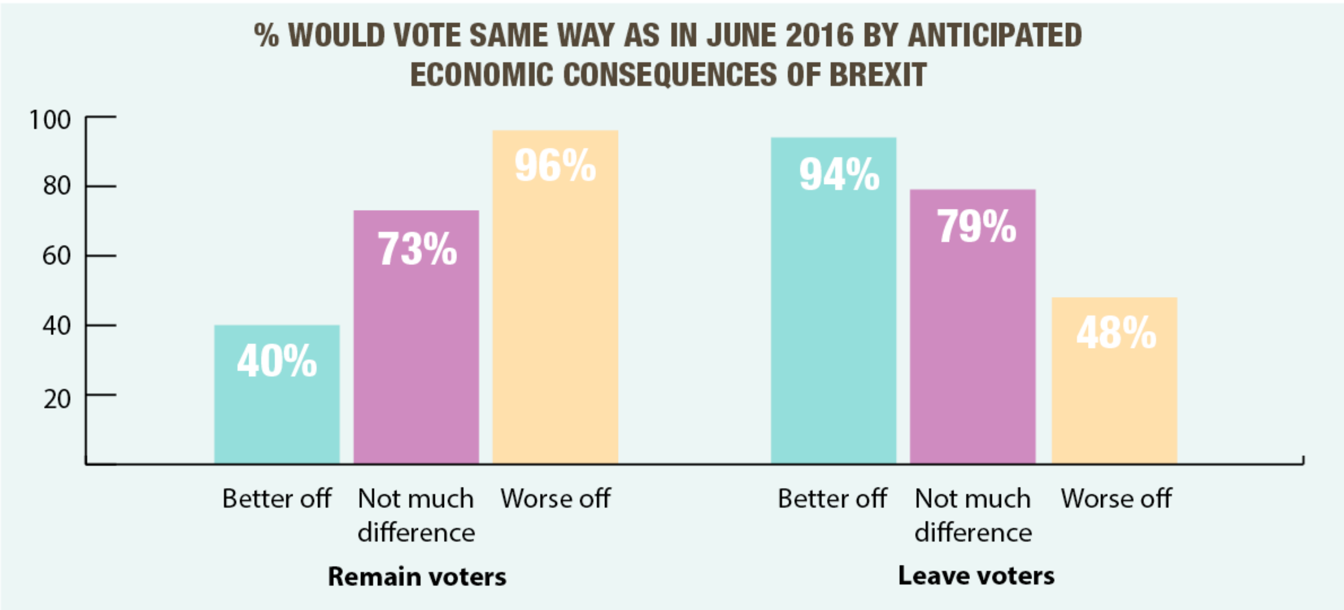
There has been a decline in support for requiring prospective EU migrants to Britain to have to apply before they come to Britain



Voters have become somewhat more pessimistic about the economic consequences of Brexit.



Voters' willingness to vote the same way as they did in the EU referendum depends on their perceptions of the economic consequences of Brexit.



INTRODUCTION

The negotiations between the UK and the EU have reached a crucial stage. The UK government has now laid out the kind of relationship that it would like the UK to have with the EU after it has left, and negotiations with a view to reaching a political agreement about that relationship are in progress. Meanwhile discussions continue towards concluding a final legal text of the withdrawal treaty. With the UK due to leave on 29 March next year, these talks need to come to some kind of a conclusion by the end of the year – at least assuming that the country is not simply to leave the EU on that date without any agreement or treaty in place.

The decision to leave the EU was, of course, a consequence of a majority vote to Leave in a referendum held on 23 June 2016. On the UK side at least, the government has been attempting to implement a popular mandate, even though many ministers in the government had wanted the UK to Remain in the EU. Thus, a key question to ask of the Brexit process is how far it is meeting the expectations that lay behind the popular vote to Leave, and whether the negotiations have in any way affirmed or undermined that decision in the eyes of voters. In order to help answer that question we have been tracking attitudes towards Brexit since shortly after the referendum vote. We first asked voters in September 2016 what they would like to see included in the Brexit agreement and subsequently undertook a similar exercise the following February. Thereafter in July and October last year we asked voters a variety of questions about how well they thought the negotiations were going while also tracking whether there were any signs that attitudes towards what Brexit should mean had changed.

We have now undertaken a further wave of interviewing. Between 7 June and 8 July we interviewed, either online or by phone, 2,048 members of NatCen's mixed mode random probability panel, which consists of people who were first interviewed for the annual British Social Attitudes survey and have agreed to take part in further short surveys (Jessop, 2018; Phillips et al., 2018). This figure represents a response rate of 56% among the 3,734 people who were invited to participate in the survey. In order to limit the impact of differential willingness to participate in this wave of the survey, the data have been weighted to reflect the known demographic character of the population and the distribution of responses to key variables on the original British Social Attitudes survey.

This paper reports on the principal findings of this latest wave of interviewing. It falls into two parts. First, we examine whether voters' expectations and evaluations of the Brexit process have changed at all during the last nine months. How stable or otherwise have their views been about what should emerge from the Brexit negotiations and have they become more optimistic or pessimistic about the outcome? Second, we assess what impact, if any, those expectations and evaluations have had on voters' support for remaining in or leaving the EU. Which aspects of the Brexit process actually have so far proven capable of changing attitudes towards the merits of leaving the EU in the first place?

It will be noted that nearly all of the interviewing for our latest wave of research was undertaken before the Cabinet reached agreement on what kind of long-term relationship with the EU the UK should be attempting to secure, following an all-day meeting at Chequers on 6 July (HM Government, 2018). Opinion polling conducted since then suggests that those proposals have not proven popular with voters and seem to have served to undermine public confidence in how the UK government is handling the Brexit process (Curtice, 2018a). Those developments are not reflected in the findings that we report here. Nevertheless, we are able to cast important light on what are likely to prove the key considerations in voters' minds as they eventually come to a conclusion about whether leaving the EU is or is not proving to be a good idea. Whether they do or not will, of course, be an important consideration in any evaluation of the success of the Brexit process – and could prove crucial if and when voters are invited to cast a judgement on the success of the process at a future general election and/or referendum.

EXPECTATIONS

Much of the debate about what Brexit should mean has focused on the relative importance of, on the one hand, the UK remaining a member of (or at least securing continued 'access' to) the EU's single market, and, on the other, of the UK being able to control migration into the country from the EU. These two potential objectives are reckoned to be in conflict with each other because the freedom of movement provisions that, inter alia, give EU citizens the right to come to the UK to live and work are regarded by the EU as an integral part of the single market (European Parliament, 2017). However, our previous research ascertained that there was majority support among voters both for Britain to continue to trade freely with the EU and for ending freedom of movement (Curtice, 2016).

That remains the case. However, there are signs that the level of support for controlling immigration has eased somewhat since the Brexit process began, and that, as a result, ending freedom of movement may have become somewhat less of a priority in voters' minds. This is in line with other research that has suggested that attitudes towards immigration have become somewhat more liberal during the last two years (Curtice and Tipping, 2018; Ipsos MORI, 2018).

This becomes apparent, first of all, in how respondents answered when asked whether they were in favour or against each of the following being part of the agreement between the UK and the EU. The first possibility encompasses the idea of 'free trade', which might be thought to be maximised via continued 'access' to the single market, while the second implies an end to freedom of movement.

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

As Table 1 shows, there remains something close to a consensus in favour of allowing free trade between the UK and the EU. The slight drop in the proportion expressing that view, from 88% to 86%, is not statistically significant. In contrast, there has clearly been a fall in the proportion who think that EU citizens who wish to come to the UK to live and work should have to apply to do so, not just since last autumn, but also across the whole of the period since the EU referendum. Back in September 2016 as many as 74% wanted such an arrangement to be part of the agreement between the UK and the EU, but now only 59% hold that view.

Table 1 Attitudes towards Free Trade and EU Migration, Sept 2016-June 2018

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

Even so, that means there is still apparently majority support both for maintaining free trade and for ending freedom of movement. True, attitudes towards free trade do depend somewhat on how the question is posed. This becomes clear if we address the issue of free trade from the opposite angle and ask respondents whether it should be possible for the UK and the EU to impose tariffs on each other's goods. Specifically, we asked them whether they were in favour or against:

> **Allowing Britain to put a tax on goods imported from the EU, while allowing the EU to put a tax on goods imported from Britain?**

Table 2 Attitudes towards Tariffs between the UK and the EU, October 2017-June 2018

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

Only around a half say they are actually opposed to a development that would certainly be incompatible with free trade (see Table 2). Even so, only between a fifth and a quarter actually back the introduction of tariffs. So, there is still relatively little sign here that voters necessarily acknowledge a trade-off between free trade and ending freedom of movement. Indeed, no less than 52% of those who are against the introduction of tariffs think that potential migrants from the EU to the UK should have to apply for permission to do so.

But even if many voters do not readily acknowledge a trade-off between free trade and ending freedom of movement, that does not mean we cannot ask voters what they think should happen in the event that the UK were to be faced with a choice between the two. What do people think should happen if the EU says that the UK can only enjoy free trade (which most people support) if it accepts freedom of movement? Specifically, we have asked:

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

This is a question to which the pattern of answers has previously exhibited some apparent volatility. In our survey last summer, the proportion saying that the UK should either 'definitely' or 'probably' allow freedom of movement in return for maintaining free trade increased from 54% earlier in the year to 63% - only then to fall away again to 53% the following autumn. However, now the proportion has increased once more to 60%. Meanwhile, unlike that registered in July 2017, this change has been accompanied, as we have just seen, by a decline in the proportion saying that the EU migrants should have to apply to come to the UK. Thus, this time there seems to be consistent evidence that the demand to end freedom of movement, which appeared to be a key issue in the EU referendum, has now become a somewhat less pressing issue for some voters.

Table 3 Willingness to Allow Freedom of Movement in Return for Free Trade, Sept. 2016 to June 2018.

Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?

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

At present, however, ending freedom of movement and thereby enabling the UK to 'control its own borders' remains one of the government's redlines in the Brexit negotiations. So also is the avoidance of a 'hard' border on the island of Ireland. Whether and how that objective can be achieved if Northern Ireland, along with the rest of the UK, is, as the UK government envisages, not only outside the single market but also the Customs Union, has proven one of the most difficult issues in the negotiations so far. Consequently, it has been the subject of considerable debate in recent months, after having received relatively little attention during the EU referendum campaign. This debate seems to have had an impact on public opinion in Great Britain, which now seems rather keener on avoiding any kind of border between the UK and the Republic of Ireland than it was before the Brexit negotiations began. This emerges when we ask whether the following should be part of the agreement between the UK and the EU:

> **Introducing passport checks on people travelling between the UK and the Republic of Ireland?**

Table 4 Attitudes towards Passport Checks between the UK and Ireland, September 2016 and June 2018

	Sept 16	June 18
UK/RoI Passport Checks	%	%
In favour	45	31
Neither	25	30
Against	29	38

Two years ago, more said they were in favour of introducing such checks than stated that they were opposed. Now, however, the balance of opinion has tilted in the opposite direction. That said, it is still far from clear that avoiding any kind of border control between the UK and Ireland is as much of a priority for voters as it appears to be not only for the UK government, but also the EU.

Public attitudes towards what Brexit should mean do, then, appear to have shifted somewhat during the Brexit negotiations. Voters seem to have become somewhat less concerned that Brexit should bring about an end to freedom of movement, though a majority would still prefer such an outcome, albeit not necessarily at any price. At the same time, however, voters appear to have become somewhat more concerned that there should not be a 'hard' border between the UK (and thus by implication Northern Ireland) and the Republic of Ireland. Between them these two developments might be thought to suggest that voters are potentially somewhat more open to a rather softer Brexit than they appeared to be two years ago.

EVALUATIONS

But what do voters expect Brexit actually to bring? Have their expectations of what will emerge from the Brexit process changed at all? And what do they think the consequences of leaving the EU would be? It is the answers to these questions that would appear likely to be crucial in determining whether voters feel that Brexit is going to prove worthwhile and, indeed, should continue to be pursued. If voters have come to the view the process may not work out so well after all, they might be expected to question the merits of leaving the EU. Conversely, if voters now feel that the UK is going to benefit from leaving, that might have paved the way for increased support for Brexit.

First of all in this vein, we can ask voters what specific provisions they expect to be included in the agreement between the UK and the EU. In particular, we can ask whether voters anticipate that it will include the maintenance of free trade and an end to freedom of movement, for both of which there is majority support:

> **From what you have heard and seen so far – and leaving aside whether you would like it included or not - how likely or unlikely do you think it is that the agreement will require people from the EU who want to come to live here to apply to do so in the same way as people from outside the EU?**
>
> **From what you have heard and seen so far how likely or unlikely do you think it is that the agreement will allow companies based in the EU to sell goods and services freely in Britain in return for allowing British companies to sell goods and services freely in the EU?**

Table 5 Perceptions of the Likelihood of Certain Provisions Being Part of the Brexit Agreement, July 2017-June 2018

	Free Trade			Immigration Control		
	July 17	Oct 17	June 18	July 17	Oct 17	June 18
	%	%	%	%	%	%
Very Likely	14	10	11	12	11	13
Quite Likely	45	40	34	41	39	40
Neither Likely Nor Unlikely	19	21	22	22	19	23
Quite Unlikely	18	22	27	20	25	18
Very Unlikely	2	6	5	4	4	5

More voters think that these two provisions will be an outcome of the Brexit negotiations than take the opposite view. However, the proportion anticipating that the negotiations are 'very' or 'quite' likely to facilitate the continuance of free trade has fallen noticeably from 59% a year ago to 45% now. Some voters have, perhaps, noticed that the EU have been inclined to the view that, given the UK's redlines, it was unlikely that trade between the UK and the EU will be as free in future as it is at present, and aso that, even before the publication of the Chequers Agreement, it was not clear that the UK government necessarily disagreed with that judgement. In contrast, at just over half (53%), the proportion who think it likely that Brexit will pave the way for the UK to impose immigration control on EU migrants is unchanged from what it was a year ago.

However, this decline in the proportion who think that the Brexit agreement will facilitate the maintenance of free trade between the UK and the EU has not been accompanied by a marked change in people's expectations of what Brexit will mean for the economy. Not that voters are particularly optimistic - as Table 6 shows, around twice as many (51%) think that the economy will be worse off as a result of Brexit than believe it will be better off (25%). But this picture has barely changed at all since last October, or indeed last summer. All that can be said is that on balance voters have been somewhat more pessimistic throughout the last twelve months than they were in the initial months after the referendum or, indeed, shortly before the ballot itself.[1] Voters have never been very optimistic about what the consequences of Brexit will be for the economy, and that is simply a little more clearly the case now.

1 For details of the survey conducted in June 2016, just before the referendum, see Cabrera-Alvarez et al. (2016).

Table 6 Expectations of the Consequences of Leaving the EU for the Economy, June 2016 – October 2017

	June 16	Sept 16	Feb 17	July 17	Oct 17	June 18
Expect Brexit to mean economy will be:	%	%	%	%	%	%
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

June 2016: *If Britain were to leave the EU, do you think Britain's economy would be better off, worse off, or wouldn't it make much difference?* Sept 2016-June 2018: *From what you have seen and heard so far, do you think that as a result of leaving the EU Britain's economy will be better off, worse off, or won't it make much difference?*

Meanwhile, given that voters have largely not changed their minds about whether the Brexit agreement will bring about an end to freedom of movement, it comes as little surprise that their expectations of whether the level of immigration will rise, fall, or stay the same, have not changed much either since the referendum. As Table 7 shows, around two in five think immigration will fall, as has been the case ever since the autumn of 2016.

Table 7 Expectations of the Consequences of Leaving the EU for the Level of Immigration, June 2016-June 2018

	June 16	Sept 16	Feb 17	July 17	Oct 17	June 18
Expect Brexit to mean immigration will be:	%	%	%	%	%	%
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

June 2016: *If Britain were to leave the EU, do you think immigration to Britain would be higher, lower, or wouldn't it make much difference?* Sept 2016-June 2018: *From what you have seen and heard so far, do you think that as a result of leaving the EU immigration to Britain will be higher, lower, or won't it make much difference?*

However, voters' evaluations of the success or otherwise of the Brexit process might be based on a broad synoptic impression of its progress than a detailed evaluation of its possible impact on particular features of life in Britain, let alone the detailed contents of the eventual agreement between the UK and the EU. And when voters are asked, *'How good or bad a deal do you think Britain will eventually get out of the Brexit negotiations with the EU?'* they are now on balance even slightly more likely than they were last autumn to say that Britain will get a bad deal - even though by that point voters had already become much more pessimistic about how good a deal the UK will get than they had been when we first asked this question at the beginning of 2017 (see Table 8). The decidedly pessimistic mood that was already in evidence last autumn has, it seems, simply been reinforced. Meanwhile, it may well have been strengthened yet further since our interviewing by the announcement of the Chequers agreement (Curtice, 2018a).

Table 8 Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks, February 2017-June 2018

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

That, however, still leaves the key question of who voters blame for this state of affairs. They might take the view that the UK government is making a bad job of extricating Britain from the EU. But, equally, they may feel that the EU has been unduly reluctant to strike a reasonable deal. In truth, as Table 9 shows, voters are inclined to blame both parties to the negotiations. However, in contrast to the position at the beginning of 2017, they are now somewhat more likely to be critical of how the UK government has handled the Brexit negotiations than they are to blame the EU. The reputation of the UK government has seemingly suffered more than that of the EU from the perceived progress of the Brexit talks to date.

Table 9 Perceptions of Whether the UK Government and the EU Have Handled the Brexit Negotiations Well/Badly, February 2017-June 2018

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

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

During the course of the last two years, voters have in many respects become increasingly pessimistic about what Brexit will bring. True, they have not changed their minds much about what it will mean for immigration. But so far as the economy is concerned, they are now somewhat less convinced that the Brexit agreement will make provision for free trade and have become a little more inclined to the view that Brexit will be damaging for the economy. But above all, there is now a widespread impression that the UK is going to emerge with a bad deal, the fault for which seems to be thought to lie at least as much with the UK government as with the EU.

VOTING IN ANOTHER REFERENDUM

So far, we have ascertained that voters are apparently somewhat less concerned about ending freedom of movement, rather more concerned about the economic consequences of Brexit, and overall are now markedly inclined to the view that Britain is not going to get a good deal out of the Brexit negotiations. We might wonder whether these changed attitudes and evaluations have persuaded some voters to change their minds about the merits of leaving the EU.

At first glance, the top half of Table 10, where we report how our respondents said they would vote if they had the chance to vote again in another EU referendum, strongly suggests that this is indeed what has happened. It shows that in our most recent round of interviewing as many as 59% said they would vote Remain in another referendum, while only 41% indicated they would back Leave.[2] This is by far and away the highest the level of support for Remain that we have recorded.

Table 10 Hypothetical Repeat Referendum Vote and Reported Referendum Vote, Sept. 2016-June 2018.

	Sept 16	Feb 17	July 17	Oct 17	June 18
Hypothetical Repeat Referendum Vote	%	%	%	%	%
Remain	53	52	55	53	59
Leave	47	48	45	47	41
Reported Referendum Vote 2016	%	%	%	%	%
Remain	49	50	51	51	53
Leave	51	50	49	49	47

Note: Those who said they would not vote/did not vote or who otherwise did not express a vote preference are excluded from the denominator on which these figures are calculated

However, a glance at the bottom half of the table strikes a note of caution. We also asked respondents (either when they were first interviewed for BSA or at the first panel interview they completed after June 2016) how they voted in the EU referendum in June 2016. This reveals that, despite the various forms of weighting that have been adopted in order to make the sample as representative as possible, the proportion saying they voted Remain two years ago has gradually been creeping up in our surveys. As a result, in our most recent survey, 53% of our sample said that they had voted Remain, five points above the proportion that that option actually secured in the EU referendum.

2 These are the figures that are obtained after excluding the 10% who said that they would not vote or that they did not know how they would do so.

Nevertheless, this still means that there has apparently been a six-point swing from Leave to Remain, larger than that registered by any of our previous rounds of interviewing, and a figure that would seemingly point to a 54% vote in any second referendum held now.[3] True, we observed as much as a four-point swing as long ago as the autumn of 2016, but our latest reading would still seem to suggest that more voters who voted Leave in 2016 now say they would no longer do so than has hitherto been the case.

Table 11 addresses this question directly by showing how people have said they would vote in a second referendum broken down by how they said they had behaved in June 2016. Two key points about the Leave vote emerge. First, even in the weeks and months immediately after the referendum, Leave voters (88%) were a little less likely than Remain supporters (96%) to say they would vote the same way again, and this has tended to be the case ever since - though this is in part because Leave voters have been a little more likely to say they would not vote (or that they do not know what they would do) second time around rather than that they would necessarily now vote for Remain. Second, the percentage of Leave voters who say they would make the same choice second time around has fallen – albeit no more than gradually – since the beginning of last year. As a result, now only 81% of Leave voters say they would back Brexit again, whereas the proportion of Remain voters who would vote the same way has more or less held steady at 90%. In short, there seems to have been something of a slow, long-term erosion of the coalition of support that backed Leave in 2016.

There is one group in particular amongst whom existing support for Leave has proven relatively ‘soft’. Only 70% of those aged less than 40 that voted Leave say they would do so again, whereas no less than 89% of Leave supporters aged 60 and over would still make the same choice. This is part of the reason why the already substantial age gap in support for Remain and Leave back in June 2016 now appears to have widened yet further. Support for Leave among the over sixties in our most recent survey remains at the 60% level it was back in June 2016, whereas among the under forties it has dropped from the already relatively low figure of 29% to just 23% (see also Curtice, 2018b).

3 However, we should note that if we calculate the reported and hypothetical referendum vote in our most recent survey to one decimal place and take the difference between those figures, then the swing proves to be five points rather than six, thus pointing to a 53% Remain vote.

Table 11 Hypothetical Repeat Referendum Vote by Reported Referendum Vote, Sept. 2016-June 2018.

	Sept 16			Feb 17			July 17		
	Remain	Leave	Abstained	Remain	Leave	Abstained	Remain	Leave	Abstained
Current Preference	%	%	%	%	%	%	%	%	%
Remain	96	8	43	92	8	39	93	10	50
Leave	2	88	32	7	88	28	4	88	26
Would Not Vote	2	4	25	2	3	33	3	3	23

	Oct 17			June 18		
	Remain	Leave	Abstained	Remain	Leave	Abstained
Current Preference	%	%	%	%	%	%
Remain	90	10	48	90	12	49
Leave	9	84	28	6	81	23
Would Not Vote	1	6	24	4	6	27

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

However, there is another key feature of Table 11 to which we should draw attention. Those who did not vote in 2016 are markedly more likely to say that they would vote Remain in a second referendum than they are to state that they would back Leave. Moreover, this tendency has strengthened since the initial months after the referendum and is now as strong as it has ever been. Indeed, it accounts for as much as a third of the six-point swing to Remain that we observed in our most recent survey (see Table 10 above). Should there ever be another referendum, the outcome might well depend significantly on whether those who did not vote last time around – a group which, as one might anticipate, consist disproportionately of younger people - were this time motivated to cast a ballot.

UNDERSTANDING MOVEMENT

Still, given that there does seem to have been some erosion of the Leave vote, how do we account for it? Is it to be found in the apparently increased concern we have identified about the economic consequences of Brexit, the decline in support for ending freedom of movement, or, perhaps, the greater pessimism about the kind of deal that the UK will be able to secure? For that to be the case, these trends need to be in evidence not just amongst voters in general but also Leave voters in particular - indeed, perhaps even especially so.

First of all, Table 12 shows the trend amongst Remain and Leave voters in attitudes towards whether potential EU migrants should have to apply to come to Britain in the same way as those from outside the EU. Much of the fall in support for controlling migration from the EU has in fact occurred among Remain supporters, among whom support for the idea has fallen from 62% to 47%, a drop of 15 points. However, much the same trend is also in evidence among those who voted Leave. Support for controlling EU migration among them has fallen from 89% to 75%, that is, by 14 points. As a result, at 28 points, the gap between Remain and Leave voters on this issue is, in fact, almost exactly the same (27 points) as it was at the beginning of the Brexit process. But still, whereas the movement amongst Remain supporters may have done no more than reinforce their existing stance, perhaps the drop in support for controlling migration among Leave voters has helped to undermine the support of some of them for leaving the EU.

Table 12 Attitude to EU Migration by EU Referendum Vote September 2016-June 2018

	Sept 16		Feb 17		July 17		Oct 17		June 18	
	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave
Treat EU migrants like non-EU	%	%	%	%	%	%	%	%	%	%
In favour	62	89	58	82	53	83	49	82	47	75
Neither	14	8	18	11	18	8	20	10	23	15
Against	24	3	23	7	27	8	31	8	30	9

Much the same pattern is in evidence if we look at voters' perceptions of whether the Brexit deal will allow British and EU companies to trade freely in each other's markets. While Remain voters are 14 points less likely to think that this will be the case, there has also been a 12-point fall amongst Leave supporters. The only slight difference between the two groups is that whereas there has been a corresponding increase in the proportion of Remain voters who think such a deal is unlikely, in the case of Leave supporters some now simply feel that such an outcome is neither likely nor unlikely. However, Table 13 reveals that, even back in the autumn of 2016, as many as four in five Remain voters reckoned that Brexit would leave the UK economy worse off, and thus there was little room for this figure to increase further - as indeed it has not. Although by no means dramatic in scale, more or less all of the increase in pessimism about the economic consequences of Brexit has occurred among Leave supporters, who are now eight points more likely to feel that the economy will be worse off as a result of leaving the EU, and seven points less likely to feel that it will be better off. That said, the two sets of voters still have very different views about what the economic consequences of Brexit will be.

Table 13 Expected Impact of Brexit on The Economy by EU Referendum Vote September 2016-June 2018

	Sept 16		Feb 17		July 17		Oct 17		June 18	
	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave
Expect Brexit to mean economy will be	%	%	%	%	%	%	%	%	%	%
Better off	5	58	7	54	6	46	6	45	4	51
Not much difference	15	32	13	30	14	35	11	34	15	30
Worse off	79	9	78	15	79	18	81	21	80	17

Against this backdrop, it is perhaps not so surprising that the trend towards voters being more willing to concede ending freedom of movement in return for maintaining free trade is in evidence amongst Leave as well as Remain supporters. As Table 14 shows, Remain voters are now eight points more likely than they were two years ago to think that the UK 'definitely should' be willing to strike such a deal, while the proportion who say that it 'probably should' do so is unchanged. But this pattern is more or less matched by an eight-point increase amongst Leave supporters in the proportion who think that such a deal should either 'definitely' or 'probably' be made. As a result, the two sets of voters still have very different levels of willingness to concede an end to freedom of movement, just as they did two years ago.

Table 14 Willingness to Allow Freedom of Movement in Return for Free Trade by EU Referendum Vote, Sept. 2016 to June 2018.

Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?

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

Meanwhile, if anything, Leave voters have become particularly more likely to be doubtful about how good a deal Britain will get out of the Brexit negotiations. As Table 15 shows the proportion of Leave voters who expect Britain to get a bad deal has doubled from 20% in February 2017 to 40% now, a slightly bigger change than the 16-point increase over the same period among Remain supporters. Meanwhile, the fall in the proportion of Leave supporters who believe that Britain will actually secure a good deal – 25 points – is much greater than the drop among Remain supporters – eight points – a reflection of the fact that in early 2017 it was already the case that only 17% of Remain supporters thought that Britain would get a good deal. Remain supporters have switched from an initial scepticism to widespread pessimism, while Leave supporters appear to have moved all the way from general optimism to considerable pessimism.

Table 15 Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks by EU Referendum Vote, February 2017-June 2018

	Feb 17		July 17		Oct 17		June 18	
	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave
Expect Britain to get a..	%	%	%	%	%	%	%	%
Good Deal	17	50	12	39	11	27	9	26
Neither	25	27	24	33	20	33	18	33
Bad Deal	56	20	63	26	68	38	72	40

So, the growth in concern about the economic implications of Brexit, the decline in support for ending freedom of movement and the growth in the perception that Britain will get a bad deal that we identified amongst voters as a whole are in evidence not just among Remain supporters but also – and sometimes especially so – among those who voted Leave in June 2016. But if any of these trends are to account for the apparent relative fall-off in the inclination of Leave voters to vote the same way again, we should also be able to demonstrate that those Leave voters who are now concerned about the economic consequences of Brexit, or who appear less concerned about freedom of movement, or who anticipate that the UK will get a bad deal, are particularly less likely to say that they would vote Leave in any repeat referendum. It is to whether or not this is indeed the case that we now turn.

WHICH ATTITUDES MATTER?

One way of establishing which of the various attitudes that we have measured are related to how people would vote in another referendum is to undertake a form of statistical analysis known as multivariate logistic regression. Under this procedure, we construct an equation that identifies which factors 'predict' whether someone is likely to say that they would now vote Remain or Leave. The first variable that we introduce into the analysis is how someone voted in the EU referendum in June 2016, that is, whether they voted Remain, Leave or abstained. This means that any further variables that are added to the equation have to be able to account for at least some of the difference between how people voted in 2016 and how they would vote now. Further details of the results we obtained by applying this procedure to the data of our most recent survey are to be found in the Appendix to this report. Here we simply describe the key findings.

The analysis reveals that the variable that is by far best able to account for some of the turnover in support for Brexit was what people thought the economic consequences of Brexit would be. Also of some importance was whether or not someone thought that the UK should be willing to concede freedom of movement in return for free trade. In contrast, all of the other attitudes that we have been examining, including whether voters expect the UK to get a god deal, were found to add little or nothing to our ability to 'predict' how someone says they would vote now.

The role that evaluations of the economic consequences of leaving the EU are playing in accounting for the turnover of not only Leave support but also that for Remain is illustrated in Table 16. It shows separately for those who in 2016 voted Remain and those who backed Leave the proportion who would vote the same way again, broken down by whether they think the economy will be better off or worse off as a result of leaving the EU. This information is shown not only for our most recent survey but also for each of our previous rounds of interviewing, thereby enabling us to identify whether the influence of voters' evaluations of the economic consequences of Brexit on their propensity to vote Remain or Leave a second time has changed at all during the last two years.

Table 16 Proportion of Remain and Leave voters in 2016 that Would Vote the Same Way Now as in June 2016 by Perceptions of the Economic Consequences of Brexit, September 2016-June 2018

% would vote same way again	Remain Voters Who Think Economy Will Be			Leave Voters Who Think Economy Will Be		
	Better Off	Not Much Difference	Worse Off	Better Off	Not Much Difference	Worse Off
Sept 2016	64	90	99	93	85	69
Feb 2017	53	82	97	97	85	62
July 2017	60	80	97	98	88	53
Oct 2017	40	68	96	96	80	63
June 2018	40	73	96	94	79	48

We can see immediately that both Remain voters who think that the economy will be worse off as a result of Brexit and Leave supporters who believe that it will be better off are almost all inclined to vote the same way again. In both cases the percentage saying they would vote the same way is almost 100%. In both cases, however, this proportion is somewhat lower amongst those who think that Brexit will not make much difference either way, and is then much lower again amongst Remain voters who think the economy will be better off and Leave supporters who now feel it will be worse off. Indeed, this fall off seems to be particularly sharp in our most recent survey, suggesting that after two years of debate about what Brexit will mean, voters may have become somewhat more likely to align their support for opposition to Brexit with their attitudes towards its perceived economic consequences. In any event, voters' expectations of the economic consequences of Brexit clearly make a difference to the likelihood that they would vote the same way again.

To appreciate the import of this finding, we need to remind ourselves of some of what we learnt at Table 13 above about the pattern of attitudes towards the economic consequences of Brexit amongst Remain and Leave supporters. First, there are very few Remain voters who now actually think that the economy will be better off (just 4% in our most recent survey). In contrast, although by no means large, the proportion of Leave voters who think the economy will be worse off is, at 17%, considerably greater. That proportion is also nine points bigger now than it was in September 2016. At the same time, only around a half of Leave voters now think the economy will be better off (down seven points on September 2016), whereas no less than 80% of Remain voters are of the opposite view. So, given the alignment between turnover in support for Brexit and voters' perceptions of the economic consequences of leaving the EU (as displayed in Table 16), the fact that Leave voters are (and to some extent always have been) less likely to be convinced of the economic benefits of Brexit than Remain supporters are to be persuaded of its economic disadvantages - and indeed that this is rather more so the case now than two years ago - helps to explain why Leave voters are now proving to be somewhat less loyal in their voting preference than their Remain counterparts.

In Table 17 we undertake the same kind of analysis as in Table 16, but now dividing Remain and Leave voters according to their willingness to exchange freedom of movement for free trade. Here we can see that attitudes towards this subject do also make some difference to the likelihood that someone would vote the same way now as they did two years ago. Those who voted Remain and who feel that the UK should definitely not be willing to allow freedom of movement in return for free trade are rather less likely than other Remain voters to say they would vote Remain again. Meanwhile, Leave voters who think that the UK definitely should be willing to agree such a deal are less likely than other Leave supporters to state that they would vote Leave again. However, the differences are not as sharp as those we saw in Table 16 above. For example, in our most recent survey there is only a 15-point difference between the proportion of Leave voters who think the UK definitely should concede freedom of movement in return for free trade that would vote the same way again and the equivalent figure amongst Leave voters who believe the UK definitely should not be willing to take such a step. In contrast, there is as much as a 46-point difference between the proportion of Leave voters who think the economy will be better off who say they would vote Leave again and the proportion of such voters who believe the economy will be worse off who state they would remain loyal to their 2016 vote. This helps explain why our statistical analysis says that attitudes towards free trade versus freedom of movement are less powerful than evaluations of the economic consequences of Brexit in accounting for the turnover of support for Brexit.

Table 17 Proportion of Remain and Leave voters in 2016 that Would Vote the Same Way Now as in June 2016 by Willingness to Allow Freedom of Movement in Return for Free Trade by EU Referendum Vote, Sept. 2016 to June 2018

Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?

% would vote same way again	Remain Voters				Leave Voters			
	Definitely Should	Probably Should	Probably Should Not	Definitely Should Not	Definitely Should	Probably Should	Probably Should Not	Definitely Should Not
Sept 2016	100	96	93	88	77	87	87	94
Feb 2017	99	93	84	68	75	83	87	96
July 2017	98	86	89	78	73	83	93	90
Oct 2017	94	87	87	76	73	80	85	87
June 2018	97	91	82	60	72	75	83	87

That said, attitudes towards free trade versus freedom of movement do make some difference. Thus, the fact that, as we saw at Table 14, there has been some drop in the proportion of Leave voters who would be unwilling to accept freedom of movement in return for trade and that, as a result, Leave voters are now less united than Remain supporters in their attitudes towards this subject also seems to have made a contribution to the somewhat lower commitment amongst Leave voters to vote the same way again.

Meanwhile, what, perhaps, might be thought particularly surprising is that our statistical analysis suggests that expectations of how good or bad a deal the UK will get from the Brexit negotiations is, after taking voters' other attitudes and evaluations into account, apparently relatively (albeit, not wholly) unimportant in accounting for the turnover of support for Brexit. As Table 18 shows, although Remain voters who think that the UK will get a bad deal are more likely than those who think it will secure a good deal to say that they will vote Remain again, the gap is smaller than the equivalent gap in Table 16 in respect of attitudes towards the economic consequences of Brexit. The same is even more obviously the case on the Leave side of Table 18. Relatively few of the substantial – and, as we have seen, much increased – body of Leave voters who think that the UK will get a bad deal have for been deflected from their support for Leave.

Table 18 Proportion of Remain and Leave voters in 2016 that Would Vote the Same Way Now as in June 2016 by Whether Think Britain Will Get A Good or a Bad Deal, February 2017-June 2018.

% would vote same way again	Remain Voters Who Think The UK Will Get A			Leave Voters Who Think The UK Will Get		
	Good Deal	Neither	Bad Deal	Good Deal	Neither	Bad Deal
Feb 2017	81	87	98	93	90	72
July 2017	83	93	98	94	84	77
Oct 2017	57	84	96	92	81	81
June 2018	68	82	95	90	82	76

Not least of the reasons for this is that Leave voters are particularly inclined to blame the EU for this state of affairs. We noted earlier (Table 9) that, amongst voters in general, there has been an increase in the proportion who think the EU has been handling Brexit badly. This, in fact, is a trend which has been particularly in evidence amongst Leave voters, as the bottom half of Table 19 shows. Even at the beginning of the negotiations, relatively few Leave voters were inclined to say that the EU was handling Brexit well – only 16% expressed that view in our survey in February 2017 – but, even so, that proportion has still fallen by five points. Meanwhile, there has been as much as a 14-point increase in the proportion of Leave voters who believe that the EU is actually handling things badly. In contrast while there has also been a seven-point increase in the proportion of Remain voters who hold that view, there has also been a five-point increase in the proportion of such voters who think that the EU has been handling the negotiations well. Furthermore, although, as the top half of Table 19 shows, Leave voters have also become more critical of the performance of the UK government, more are still inclined to think the EU has handled things badly than they are the UK government.

Table 19 Perceptions of Whether the UK Government and the EU Have Handled the Brexit Negotiations Well/Badly by EU Referendum Vote, February 2017-June 2018

	Feb 17		July 17		Oct 17		June 18	
	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave
UK Government	%	%	%	%	%	%	%	%
Well	18	42	10	28	9	21	8	21
Neither Well Nor Badly	26	29	21	32	19	28	16	24
Badly	55	27	68	39	71	50	76	53
The EU	%	%	%	%	%	%	%	%
Well	17	16	26	15	22	10	22	11
Neither Well Nor Badly	38	28	33	28	27	19	29	18
Badly	42	55	38	56	50	71	49	69

This tendency of Leave voters to blame the EU matters. Amongst those Leave voters who think Britain will get a bad deal but who think the EU has been handling the negotiations badly, 81% say they would vote Leave again. Although this is still somewhat short of the equivalent figure of 89% amongst those who think Britain will obtain a good deal, it is well above the 57% rate amongst the (relatively small) number of Leave voters who think that Britain will get a bad deal and who do not feel that the EU has been handling things badly.

So, it seems that what matters above all to whether voters are wiling (as most are) or not to vote the same way in a second EU referendum is what they think the economic consequences of Brexit will be. Nothing does more to persuade Remain voters to change their mind than the perception that Britain's economy might, after all, be better off after Brexit, while, equally, nothing is more likely to dissuade Leave supporters from continuing to back Brexit than the feeling that maybe, after all, Brexit might not work out so well economically. And because Leave voters have always been less likely to be convinced of the economic case for leaving than Remain voters were of the case for staying, and because Leave voters have become a little more pessimistic about the economic of leaving, this explains why Leave voters are a little less likely than Remain supporters to say that they would vote the same way again. In contrast, other aspects of attitudes to and expectations of Brexit have proven less likely to persuade voters to change their views, not least, perhaps, because disappointment (and surprise) can more easily be blamed on the failure of politicians to deliver what voters want rather than give rise to doubts in voters' minds about the wisdom of leaving or staying in the first place.

THE ABSTAINERS

But what about the other important pattern that we identified earlier, that is, that those who did not vote in the EU referendum are now more inclined – and perhaps increasingly so – to say that they would vote Remain rather than Leave? How might we account for this pattern?

First of all, we can compare the attitudes of those who abstained with those of voters in general. For example, are those who abstained relatively pessimistic about the economic consequences of Brexit – and perhaps have even become more so during the course of the last two years? Table 20 indicates that this has largely been the case. At each of our rounds of interviewing those who abstained have on balance been rather more pessimistic about the economic consequences of leaving the EU than have respondents to the survey in general. For example, in our most recent survey those who think the economy would be worse off outnumber those who think it will be better off by 54% to 21%, a gap of 33 points. The equivalent gap amongst voters in general is 26 points. Meanwhile, although there have been some ups and downs in the level of pessimism among those who abstained, the level of pessimism has been towards the higher end of its range in our more recent surveys.

Table 20 Expected Impact of Brexit on The Economy Amongst Those Who Abstained in the EU Referendum, September 2016-June 2018.

	Sept 16	Feb 17	July 17	Oct 17	June 18
Expect Brexit to mean economy will be…	%	%	%	%	%
Better off	16	23	19	21	21
Not much difference	31	30	32	20	23
Worse off	52	44	47	59	54
Net: Better Off-Worse Off	-36	-21	-28	-38	-33
Net: Better Off-Worse Off: All Voters	*-15*	*-17*	*-25*	*-27*	*-26*

That said, those who abstained in the EU referendum have not proven very different from voters in general in their willingness or otherwise to concede freedom of movement in return for securing free trade. Table 21 reveals that, for much of the period of the Brexit negotiations, those who abstained have, if anything, been inclined to say that ending freedom of movement should not be set aside in order to be able to continue to trade freely with the rest of the EU. However, our most recent survey finds that those who abstained have now swung substantially in favour of striking such a deal, much as we saw earlier (in Table 3) that voters in general have done.

Table 21 Willingness to Allow Freedom of Movement in Return for Free Trade Amongst Those Who Abstained in the EU Referendum, Sept. 2016 to June 2018.

Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?

	Sept 16	Feb 17	July 17	Oct 17	June 18
	%	%	%	%	%
Definitely should	16	18	26	18	31
Probably should	29	30	26	30	30
All Should	*45*	*48*	*53*	*48*	*61*
Probably should not	35	31	31	33	25
Definitely should not	19	18	12	19	13
All Should Not	*54*	*50*	*43*	*52*	*38*

Meanwhile, when it comes to whether Britain will get a good or a bad deal, the balance of opinion amongst those who abstained has largely mirrored that amongst voters as a whole (see Table 22). Back in February 2017 those who abstained were only slightly more likely to think that Britain will get a bad deal (34%) than believed it would secure a good one (26%), much as was the position amongst all voters. Now those who abstained are much more likely to think that Britain will get a bad deal (58%) than a good one (14%), reflecting closely the trend that has been in evidence amongst voters in general.

Table 22 Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks Amongst Those Who Abstained in the EU Referendum, February 2017-June 2018

	Feb 17	July 17	Oct 17	June 18
Expect Britain to get a…	%	%	%	%
Good Deal	26	23	22	14
Neither Good Nor Bad	37	33	33	26
Bad Deal	34	41	45	58
Net: Good-Bad	-8	-18	-23	-44
Net: Good-Bad: All Voters	*-4*	*-19*	*-33*	*-40*

But which attitudes matter most when it comes to the choice that those abstained now say they would make between Remain and Leave? Again, we can use multivariate logistic regression to help us answer that question. Of course, in this instance we cannot include in our equation how people voted in the EU referendum and so our equation simply identifies the variables that are most closely related to the preference that voters have now. In the event, the results (not shown) are very similar to those for our model of the turnover in support amongst those who did vote. The attitude that most strongly 'predicts' the current preference of those who did vote in June 2016 is what they think the economic consequences of Brexit will be. At the same time, also of some importance is whether they would be willing to concede keeping freedom of movement in return for retaining free trade, while nothing else is especially important.

Just how strongly voters' views of the economic consequences of Brexit are related to how they say they would vote in another referendum is illustrated in Table 23. In our most recent survey no less than 71% of those who said the economy would be better off as a result of leaving the EU say they would now vote Leave, while only 23% indicated that they would vote Remain. In contrast, amongst those who said that the economy will be worse off, 70% said they would vote Remain, and just 5% Leave. Meanwhile, those who say that leaving the EU will not make much difference either way to the economy are evenly balanced between Remain (25%) and Leave (26%), though nearly a half of this group do not express a preference for either option. For the most part these broad patterns have been in evidence throughout the last two years. Thus, there is little doubt that the fact that those who abstained are relatively pessimistic about the economic consequences of Brexit and, if anything, have become rather more so, helps explain why those who abstained are more likely to say they would now vote Remain rather than Leave.

Table 23 Current Preference of Those Who Abstained in 2016 by Perceptions of the Economic Consequences of Brexit, September 2016-June 2018

	Expect Economy To Be…					
	Better Off		Not Much Difference		Worse Off	
Vote Intention	Remain	Leave	Remain	Leave	Remain	Leave
	%	%	%	%	%	%
Sept 2016	6	82	26	44	64	10
Feb 2017	5	61	27	23	64	12
July 2017	28	56	30	34	74	10
Oct 2017	20	65	29	41	64	11
June 2018	23	71	25	26	70	5

Still, whether people were willing to concede freedom of movement in return for free trade also helps us to distinguish between those who abstained in 2016 but would now vote Remain from those who would back Leave. Indeed, those who think that the UK should definitely be willing to take such a step have consistently been very likely to say that they would back Remain – most recently nearly three quarters (74%) have said that they would do so while only one in ten (8%) indicate that they would vote Leave (see Table 24). However, in contrast to the position in respect of the economic consequences of Brexit, the pattern is not symmetrical. Those who say that the UK definitely should not make such a deal have in our two most recent surveys barely been more likely to indicate that they would vote Leave rather than Remain, while the proportion who have said they would vote Leave has never approached the level that support for Remain has done among those who say that the UK definitely should make such a deal. Not least of the reasons for this is that those inclined to the view that Britain should not concede freedom of movement are less likely to express a preference either way; rather, many of them say they again would not vote. It seems that while a strong wish to retain free trade helps incline those who abstained towards backing Remain, a similarly strong wish to end freedom of movement proves not to be as compelling a reason to back Leave. Thus, the fact that, until recently at least, many of those who abstained were reluctant to exchange freedom of movement for free trade has never brought many of this group into the Leave camp.

Table 24 Current Preference of Those Who Abstained in 2016 by Willingness to Allow Freedom of Movement in Return for Free Trade, September 2016-June 2018.

Do you think Britain should or should not allow people from the EU to come here freely to live and work in return for allowing British firms to sell goods and services freely in the EU?

	Definitely Should		Probably Should		Probably Should Not		Definitely Should Not	
Vote Intention	Remain	Leave	Remain	Leave	Remain	Leave	Remain	Leave
	%	%	%	%	%	%	%	%
Sept 2016	71	5	58	17	32	42	17	62
Feb 2017	60	20	55	14	23	34	11	47
July 2017	80	11	66	22	23	36	13	53
Oct 2017	81	10	56	20	33	43	26	34
June 2018	74	8	47	25	33	35	27	35

A not dissimilar observation applies to perceptions of whether Britain will secure a good or bad deal out of the Brexit negotiations (see Table 25). Among those who abstained who think that the UK will obtain a bad deal, around two-thirds say they would vote Leave, while only around one in six say they would vote Leave. But less than half of those who think that the UK will get a good deal say that they would Leave, while around a third would still vote Remain. So, again, even those with perceptions of the outcome of the Brexit negotiations that might be thought to incline voters towards Leave are not necessarily saying that this is what they would do – which in turn helps explains why our statistical modelling says that such perceptions are relatively important in identifying how those who abstained in 2016 now say they would vote.

Table 25 Current Preference of Those Who Abstained by Expectations of Whether Britain Will Get a Good or Bad Deal out of the Brexit Talks, February 2017-June 2018

	Expect Britain to get a…					
	Good Deal		Neither		Bad Deal	
Vote Intention	Remain	Leave	Remain	Leave	Remain	Leave
	%	%	%	%	%	%
Feb 2017	26	44	24	27	63	15
July 2017	42	51	40	29	62	12
Oct 2017	35	47	31	34	66	15
June 2018	35	43	24	30	65	16

CONCLUSION

It is often argued that voters are reluctant to change their minds about Brexit. The process, it is suggested, is being viewed through a partisan lens (Hobolt et al., 2018). For example, apparent setbacks are blamed by Leave voters on the EU and thus are interpreted as evidence that the UK should be leaving, while Remain voters suggest that such setbacks confirm the folly of trying to leave in the first place. And, indeed, we have seen that Leave voters are more likely to think the EU is handling the process badly, whereas Remain voters are more likely to be critical of how the UK has been dealing with the Brexit negotiations.

Yet, in practice, this has not stopped some voters from changing their minds about what they would like to see emerge from Brexit. For example, voters seem more sympathetic than they were two years ago to the merits of not having a 'hard' border on the island of Ireland. Further, although there still appears to be majority support for ending freedom of movement, it seems to be somewhat less of a priority than it was shortly after the EU referendum.

Meanwhile, attitudes towards the progress of the negotiations have certainly changed. Both Remain and Leave supporters have become markedly more critical of how both the UK government (especially) and the EU (somewhat less so) have been handling the negotiations. They have also become markedly more pessimistic about how good a deal Britain will get. Voters on both sides of the debate have apparently been taking notice of the perceived progress of the negotiations and come to rather similar conclusions about how well they are being handled, albeit perhaps not necessarily for the same reasons.

As compared with the strength of some of these trends, attitudes towards whether the UK should be leaving the EU or not have, indeed, been remarkably stable. Britain is still more or less evenly divided between a body of voters who would vote Remain and another group that would vote Leave. Yet from the outset of the Brexit process support for Leave has generally proven a little less firm than that for Remain, and the difference between the willingness of the two sets of voters to vote the same way again may also have widened a little. Meanwhile, those who did not vote in 2016 are noticeably more inclined to say they would now vote Remain rather than Leave. As a result, instead of a narrow majority in favour of leaving the EU recorded in the referendum in June, there might now be a narrow majority in favour of Remain, though in any second referendum much might turn on the relative propensity of Leave and Remain supporters to make it to the polling station.

However, the reason for these patterns lies not so much in voters' evaluations of the progress of the negotiations – or indeed in what they want from Brexit - as in their expectations of what the economic consequences of Brexit will be. Nothing is more likely to persuade someone who voted Leave in 2016 that perhaps they made the wrong choice than the perception that the UK will economy will suffer as a result of Brexit. Equally, nothing is more likely to persuade someone who voted Remain that perhaps the UK should be leaving after all than the perception that the UK economy might benefit from Brexit. And because the level of pessimism among Remain voters about the economic consequences of Brexit has always been greater than the level of optimism among Leave voters, together with the fact that that optimism has seemingly diminished somewhat (albeit much less so than optimism about the overall shape of the Brexit deal), this pattern has served to erode some of the support for Leave. Meanwhile, relative pessimism about the economic consequences of Brexit amongst those who abstained in June 2016 also appears to be the principal reason why this group is more inclined to back Remain rather than Leave.

This perhaps should not surprise us. After all, no other variable was more strongly related to how people voted in the EU referendum than what they thought the economic consequences of Brexit would be (Curtice, 2017). It seems that this aspect of the debate about Brexit is now also the one that is most likely to persuade voters to change their minds about the merits of Brexit. Consequently, it is also likely to be the perceived economic implications of whatever deal (or absence of a deal) that the UK eventually reaches with the EU, rather than the details of its content, that are most likely determine whether or not there is still majority support for leaving the EU at the end of the Brexit process. However, what conclusion voters will eventually reach about the economics of Brexit remains to be seen.

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APPENDIX

The following table gives further details of the multivariate logistic regression of how people say they would vote in an EU referendum now to which reference is made in the main text.

Table A1 Logistic Regression of How People Say They Would Vote in a Referendum Held Now

Would vote Leave vs Would vote Remain

	Coefficient	Standard Error	Significance
2016 Vote			
Remain	-1.55	.27	***
Leave	+2.08	.24	***
(Did not vote)			
Impact on Economy			
Better Off	+3.44	.27	***
Not much difference	+2.03	.23	***
(Worse Off)			
Accept Freedom of Movement for Free Trade			
Definitely should	-2.06	.35	***
Probably should	-1.01	.29	***
Probably should not	-0.38	.29	
(Definitely should not)			
Expect Britain to get a…			
Good Deal	+1.15	.31	***
Neither	+0.47	.21	*
(Bad Deal)			
EU is Handling Brexit			
Well	-1.68	.36	***
Neither	-0.85	.28	**
(Badly)			

UK Govt is Handling Brexit			
Well	+0.90	.35	*
Neither	+0.94	.29	***
(Badly)			
Passport Checks Between UK and Ireland			
In favour	+0.30	.25	
Neither	+0.83	.25	***
(Against)			
Impact on Immigration			
Higher	-1.12	.40	**
Not Much Difference	-0.08	.20	
(Lower)			
Likelihood that EU Migrants Will Have to Apply			
Likely	+0.10	.24	
Neither	-0.54	.29	
(Unlikely)			

Nagelkere R-squared = 81%
*** significant at the 0.001% level
** significant at the 0.01% level
* significant at the 0.05% level.

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