



YouGov[®]
What the world thinks

Fruitcakes, Loonies, Closest Racists & Winners

Europe, the European Elections and the rise of Ukip

Sticks & Stones

‘Ukip is sort of a bunch of ... fruit cakes and loonies and closet racists mostly’



**David Cameron,
4th April 2006**

What the World Think



The Rise of Ukip: The Westminster Context (2004 – 2013)

Source: YouGov for BES Continuous Monitoring survey

Sample: c1,000 British adults per month
25

Percentage Westminster Voting Intention

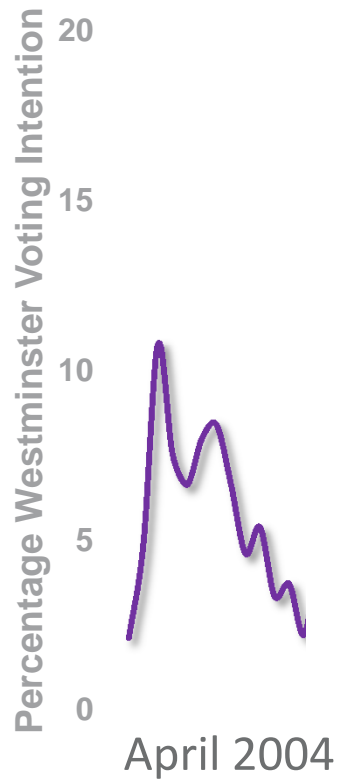
20
15
10
5
0



The Rise of Ukip: The Westminster Context (2004 – 2013)

Source: YouGov for BES Continuous Monitoring survey

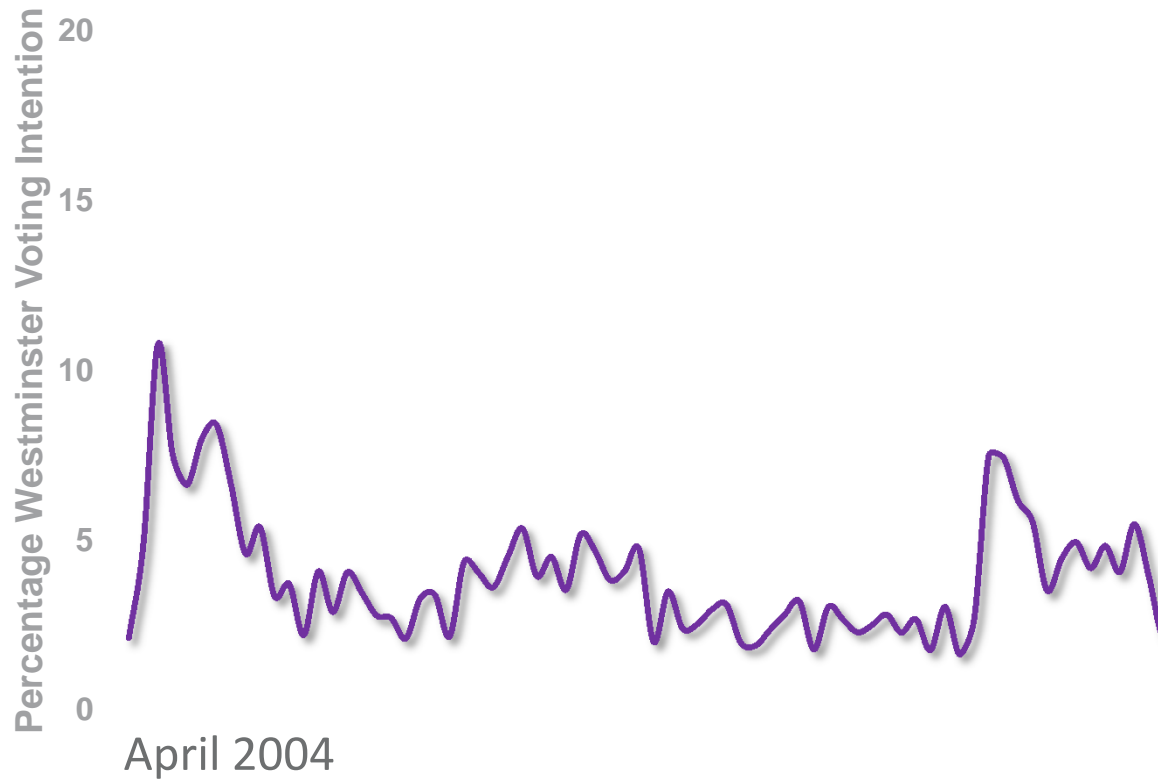
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The Rise of Ukip: The Westminster Context (2004 – 2013)

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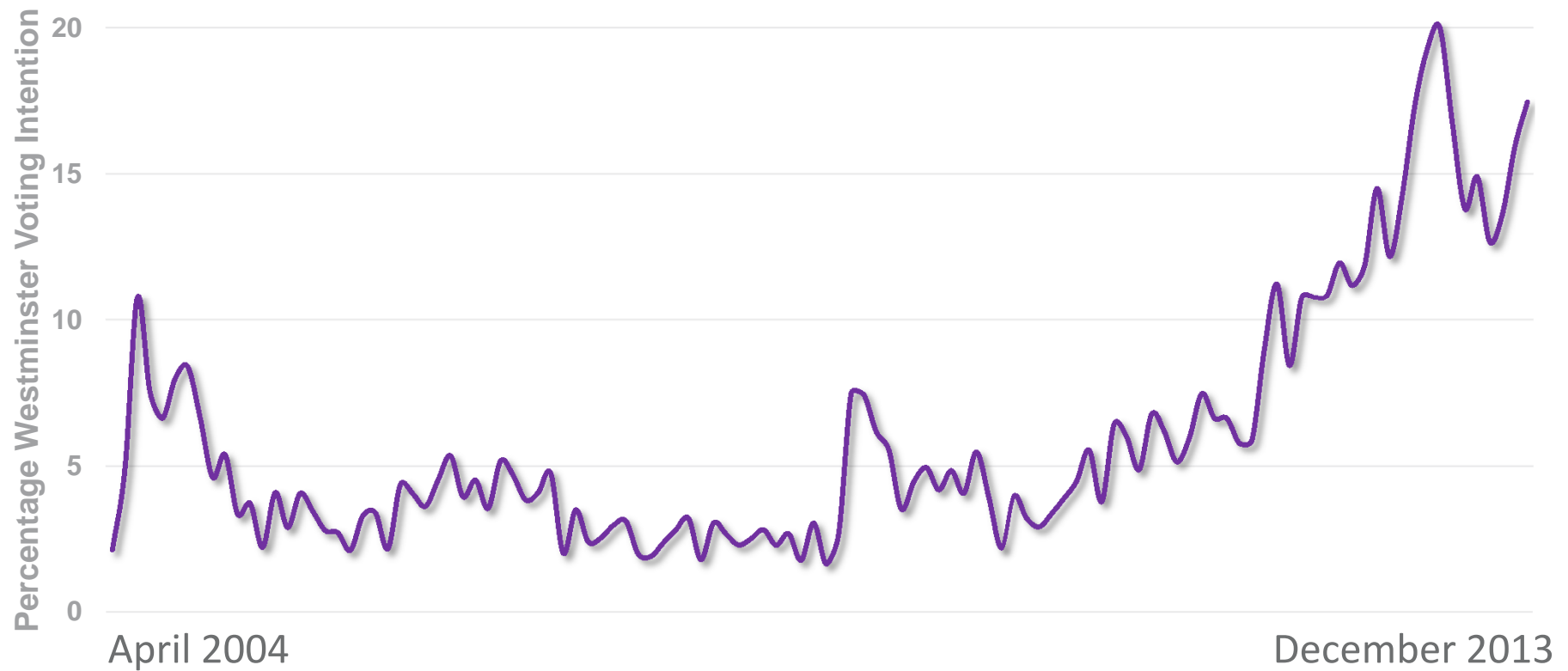
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The Rise of Ukip: The Westminster Context (2004 – 2013)

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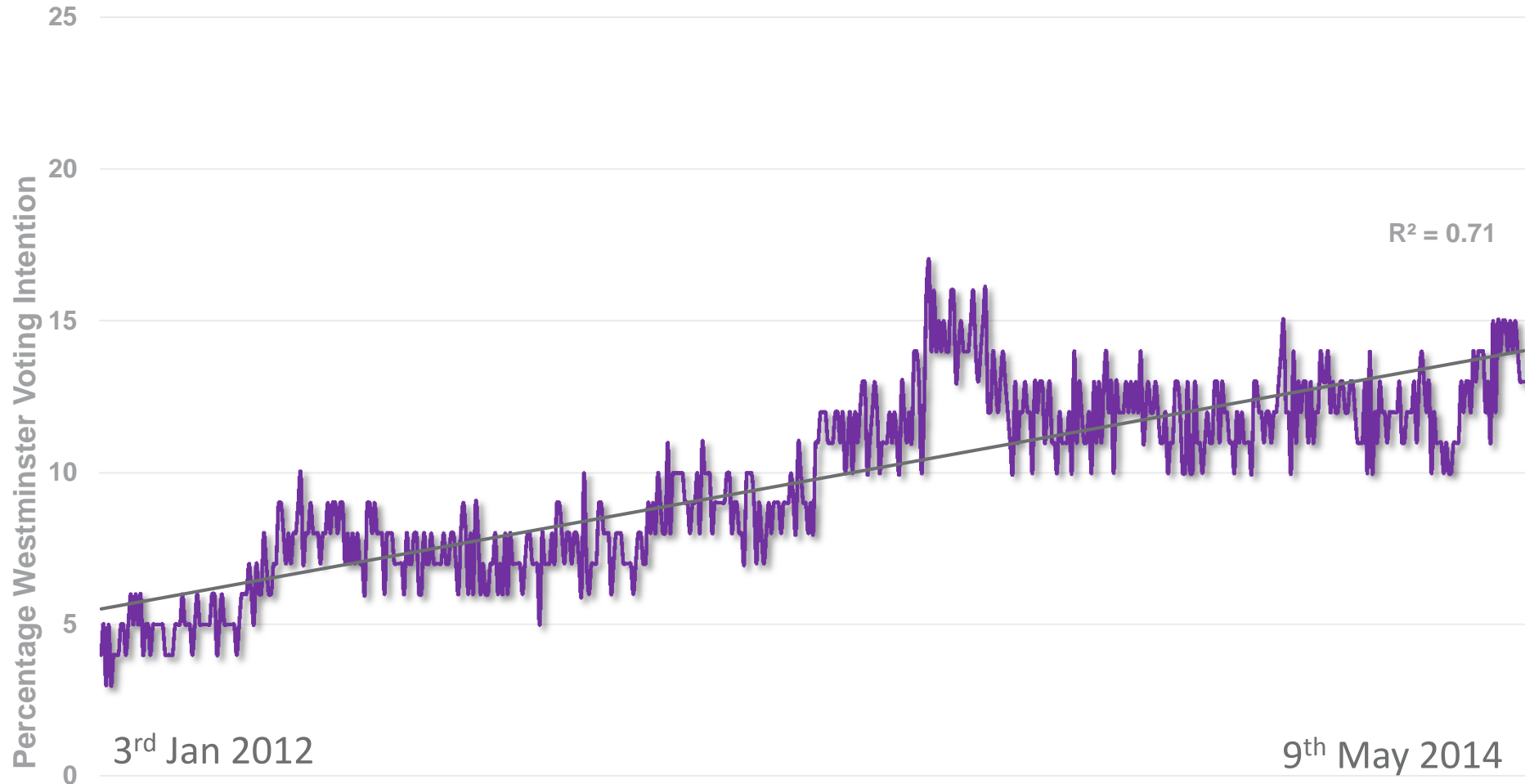
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The Rise of Ukip: The Westminster Context (2004 - 2013)

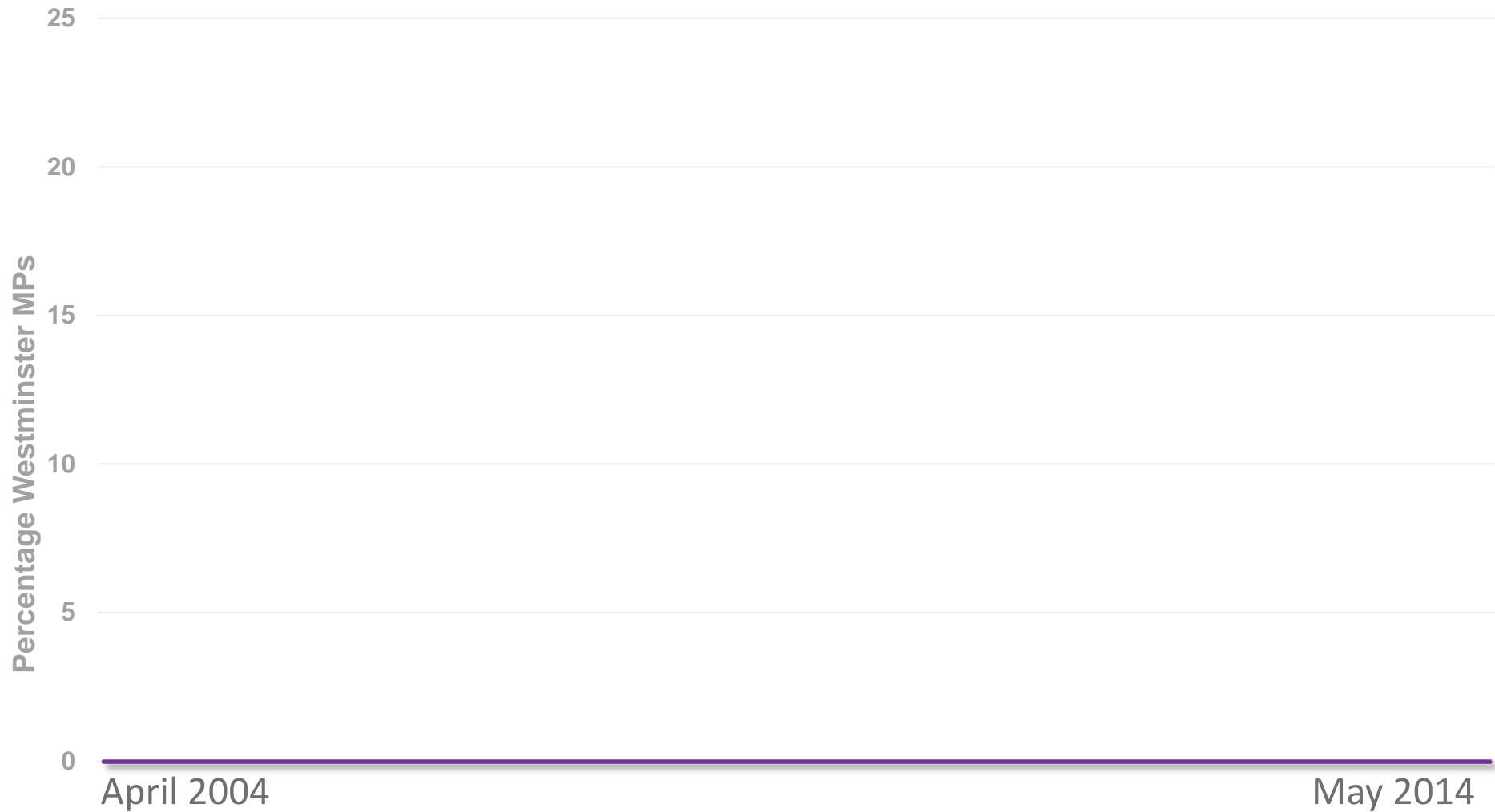
Source: YouGov Daily Polling for News UK

Sample: c1,500 British adults per day



The Rise of Ukip: The Westminster Context (2004 – 2013)

Source: House of Commons Library



The Rise of Ukip: the European Election Context

	European Election Result (May 2009)	European Election Result (May 2014)
Conservative	28%	24%
UKIP	17%	27%
Labour	16%	25%
Liberal Democrat	14%	7%
Green	8%	8%

The Rise of Ukip: the European Election Context

	Actual Result	YouGov
UKIP	27	27
Lab	25	26
Con	24	22
Green	8	10
Lib Dem	7	9
Average Error		1.4

The Rise of Ukip: the European Election Context

	Actual Result	YouGov	ICM	Opinium	TNS	ComRes	Survation
UKIP	27	27	25	32	31	33	32
Lab	25	26	29	25	28	27	27
Con	24	22	26	21	21	20	23
Green	8	10	6	6	6	6	4
Lib Dem	7	9	7	6	7	7	9
Average Error		1.4	2.0	2.2	2.4	2.8	2.8

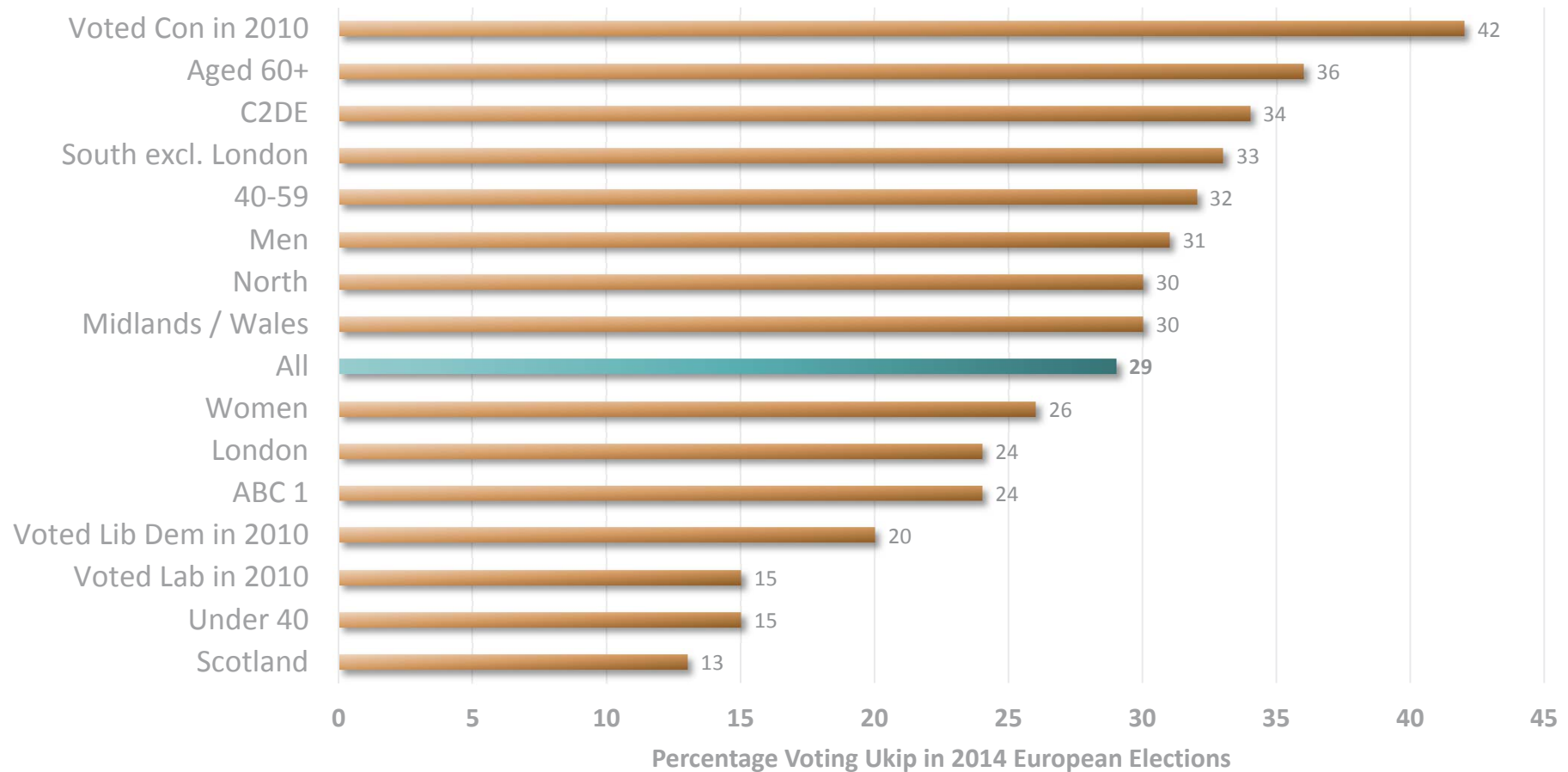
Why they Think That



The Ukip vote: Winning here?

Source: YouGov Daily Polling Fieldwork: 31 March – 30 April 2014

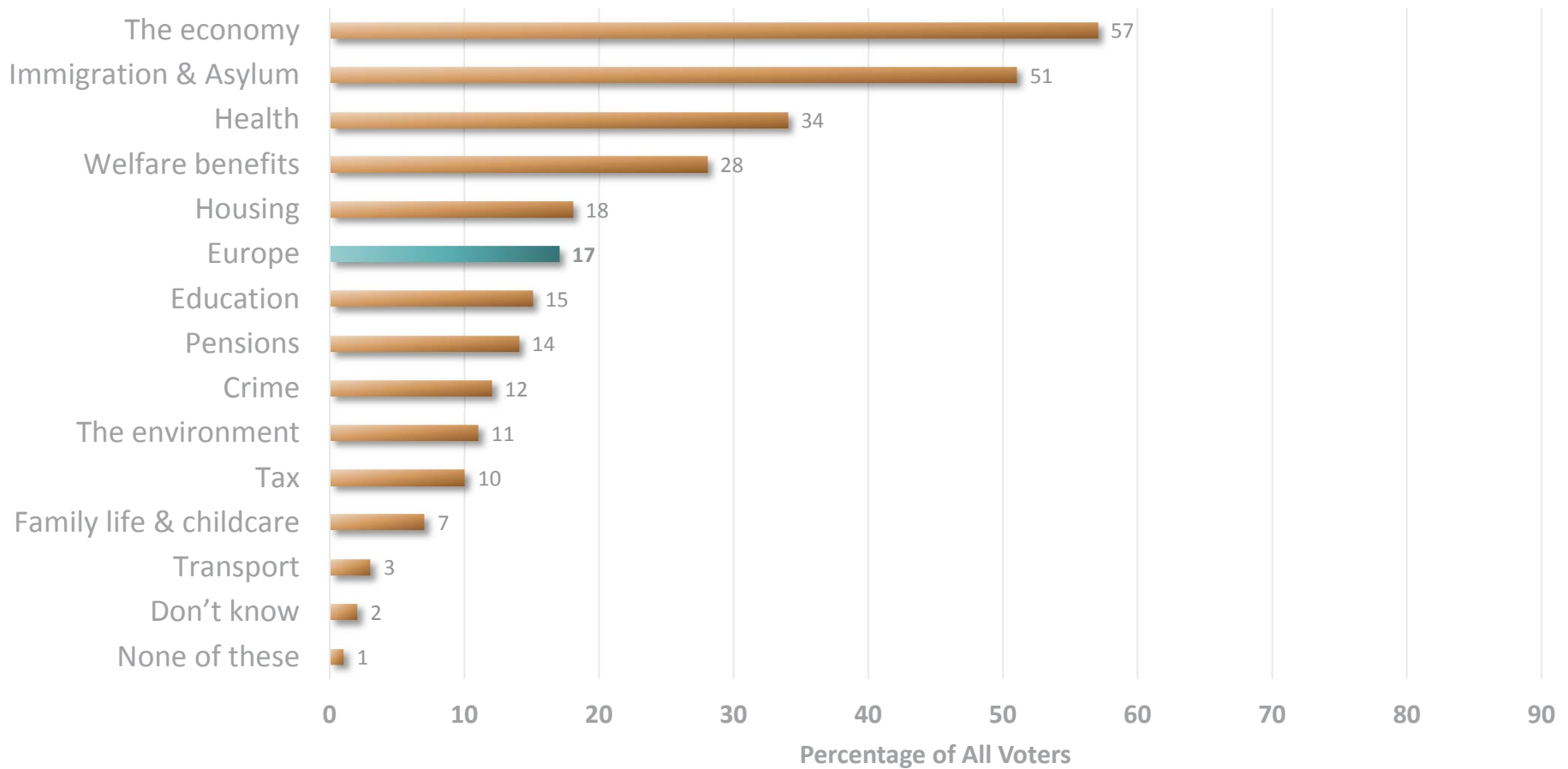
Sample: 8,894 British adults



Most important issues facing the country

Source: YouGov for New UK Fieldwork: 7-8 April 2014

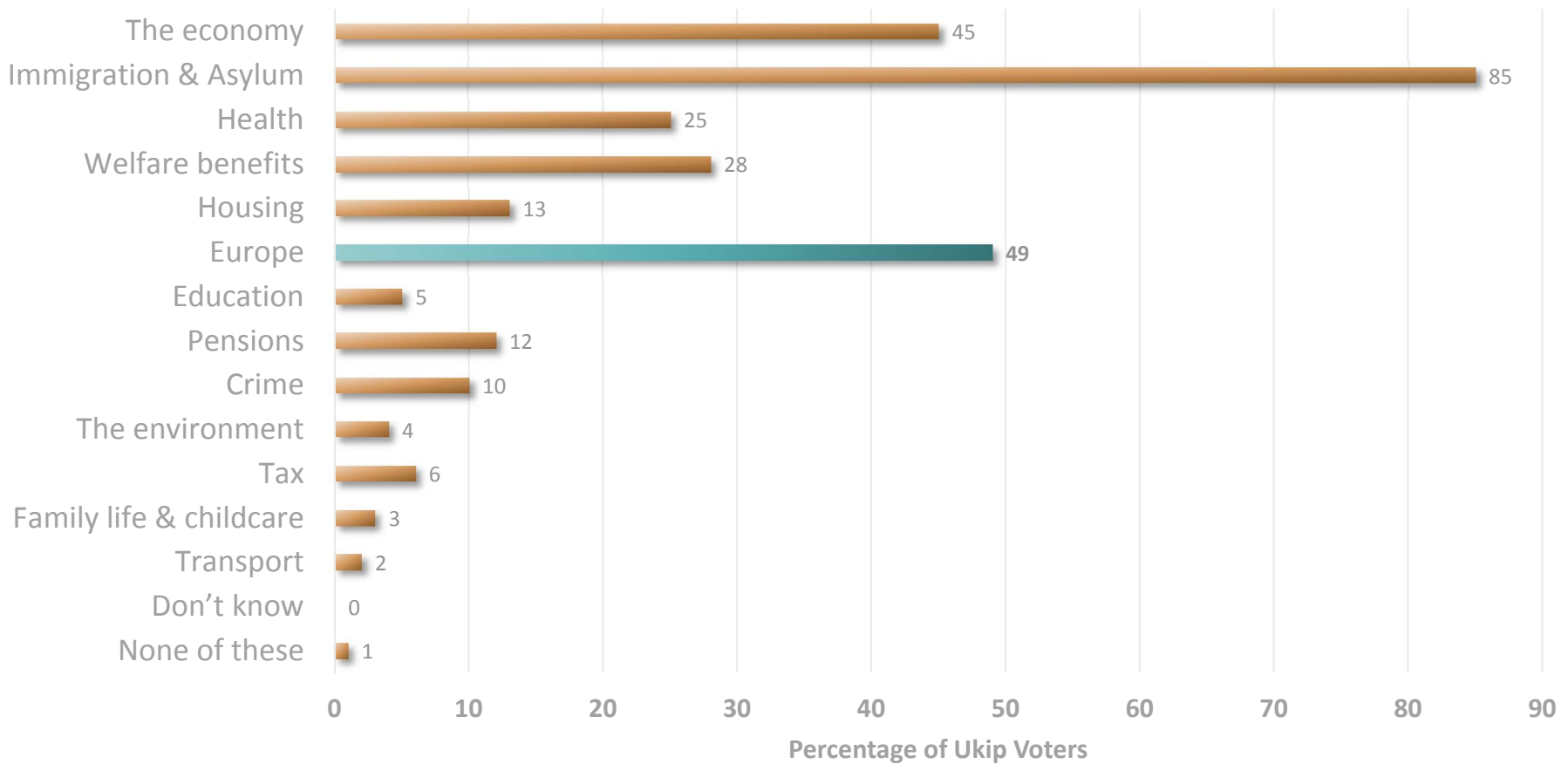
Sample: 2,144 British adults



Most important issues facing the country

Source: YouGov for New UK Fieldwork: 7-8 April 2014

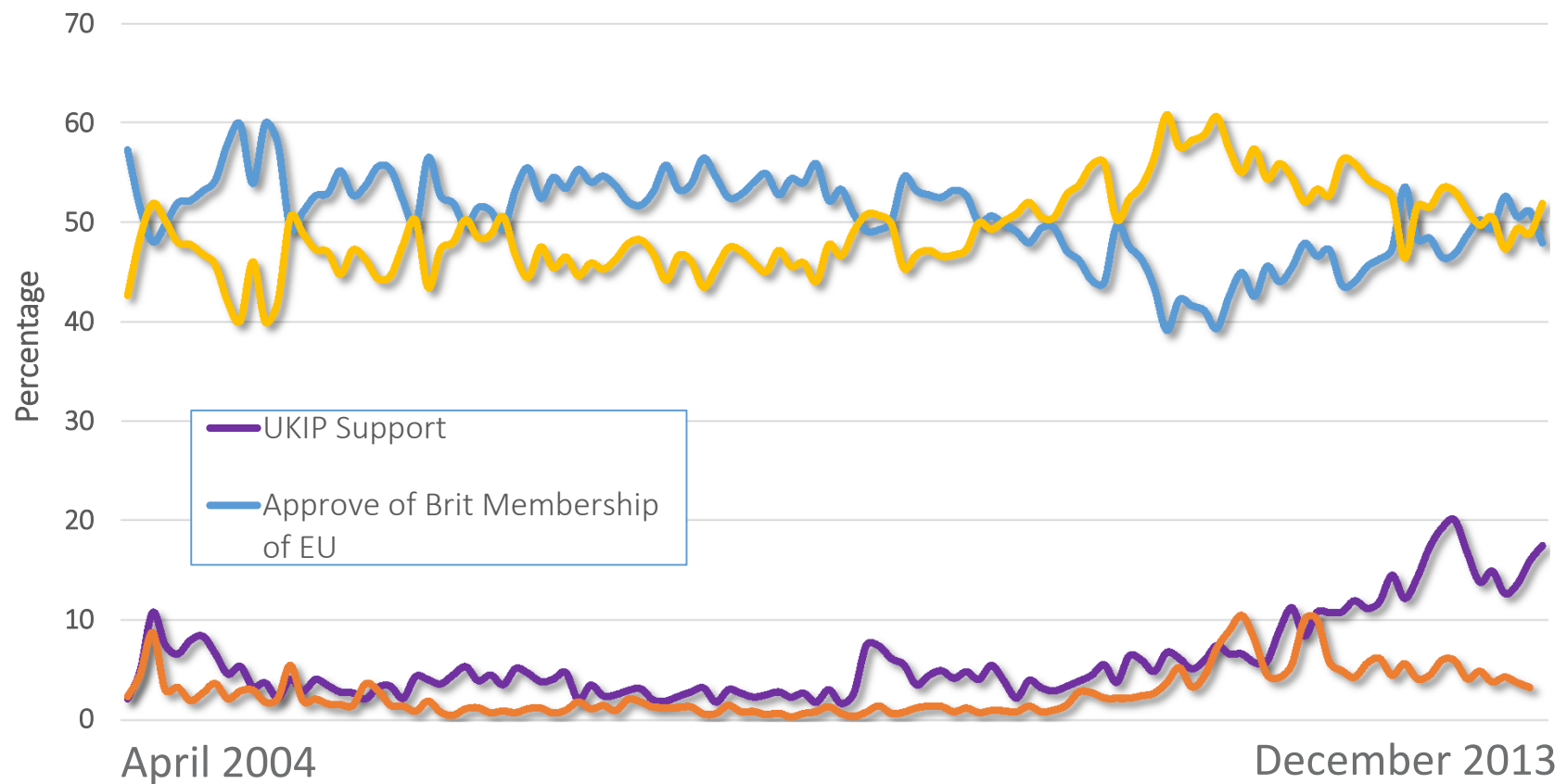
Sample: 2,144 British adults



The importance of Europe as an issue

Source: YouGov for BES Continuous Monitoring Survey

Sample: c1,000 British adults per month



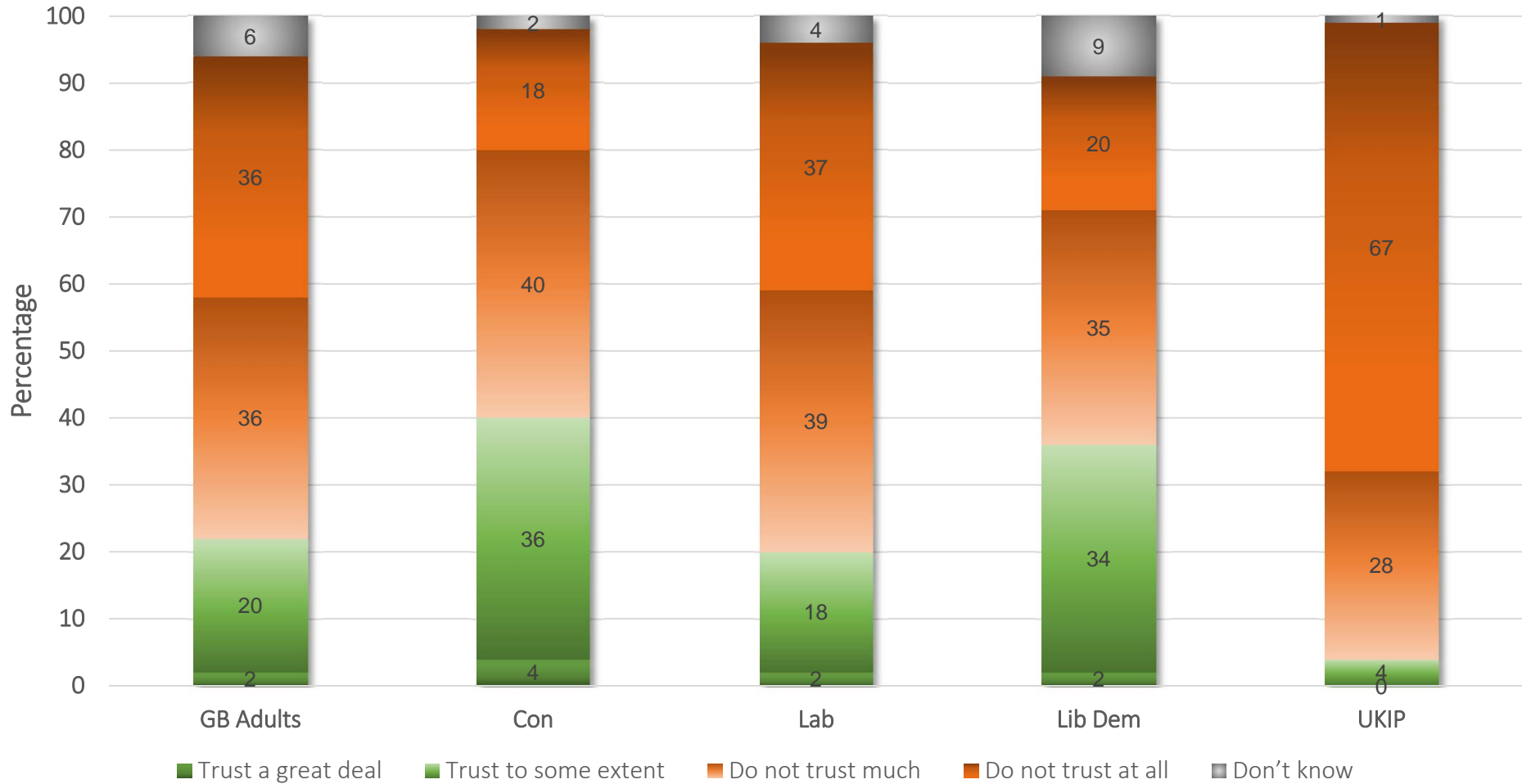
The Three D's

- Dissatisfied
- Distrusting
- Disapproving

In general, how much do you trust leading politicians from the main parties in Britain to tell the truth?

Source: YouGov Fieldwork: 28 April – 6 May 2014

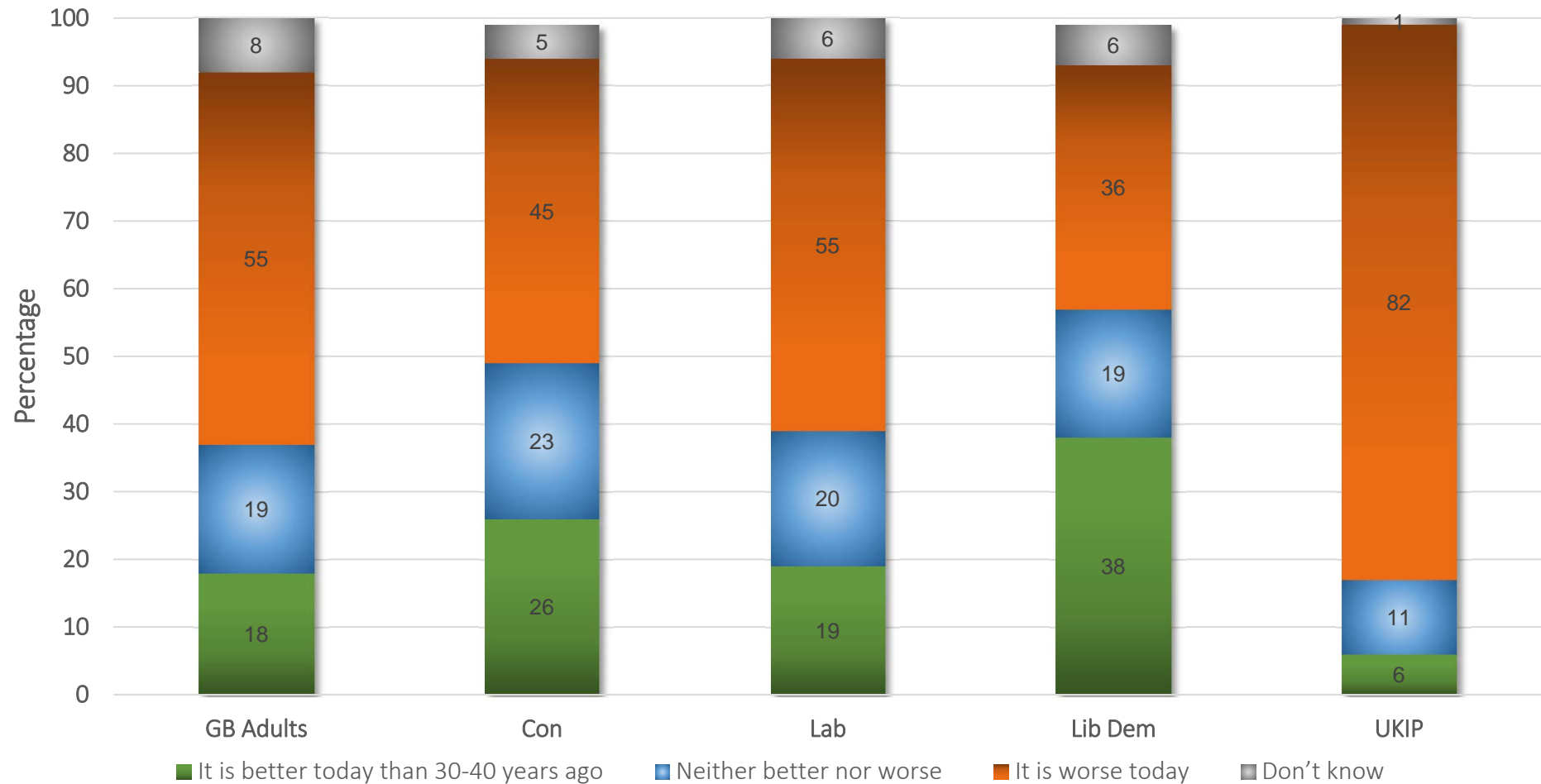
Sample: 1,805 British adults



On balance, do you think Britain is better or worse place in which to grow up than it was thirty or forty years ago?

Source: YouGov Fieldwork: 28 April – 6 May 2014

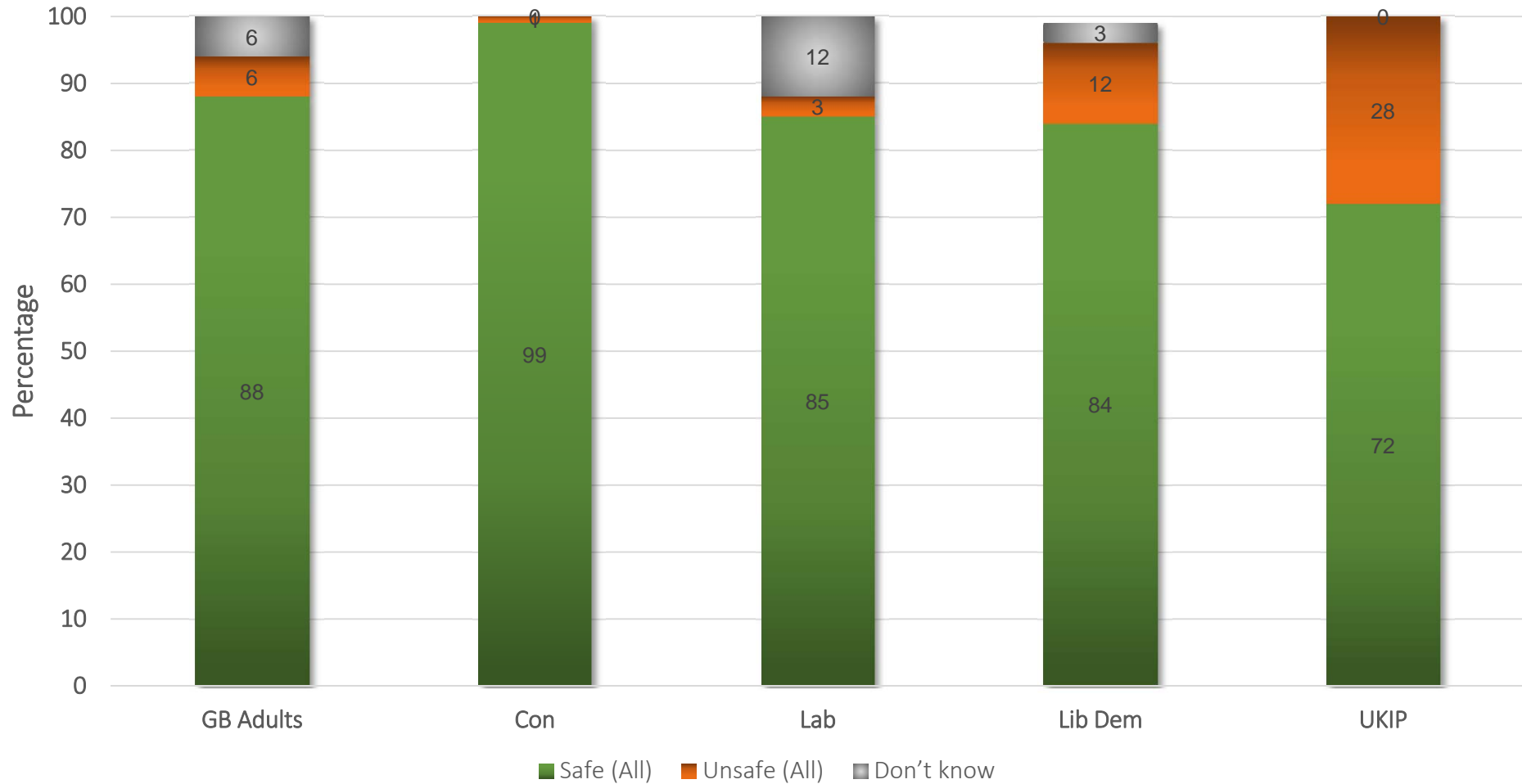
Sample: 1,805 British adults



From what you have heard, how safe do you think the MMR vaccination is?

Source: YouGov Fieldwork: 7-8 April 2014

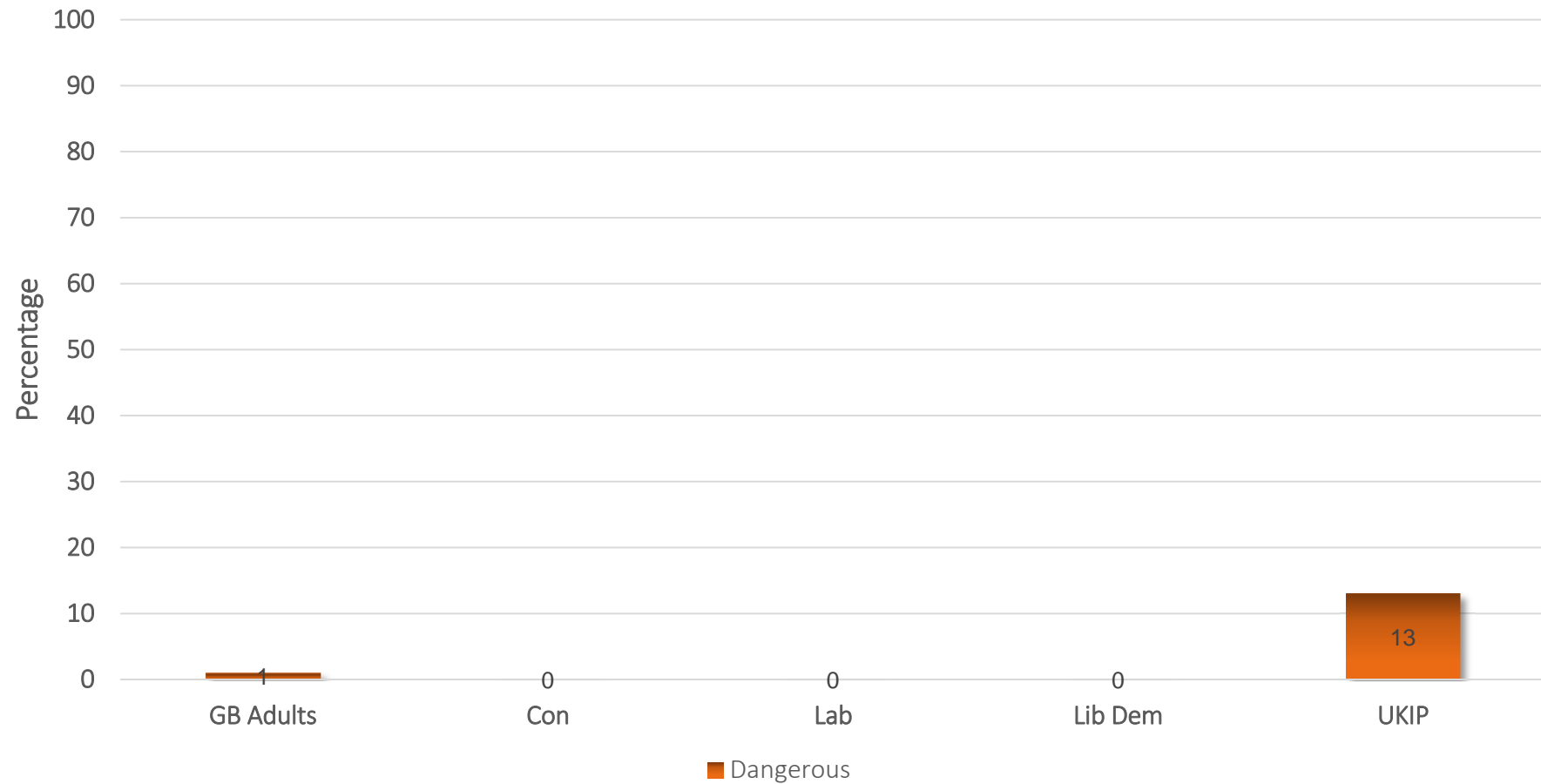
Sample: 1,765 British adults



From what you have heard, how safe do you think the MMR vaccination is?

Source: YouGov Fieldwork: 7-8 April 2014

Sample: 1,765 British adults



2014 European Elections in Context

- The rise of Ukip is on a different scale to previous occasions and is not just about Europe
- Part of a wider scepticism across many parts of Europe
- European Elections have major implications for 2015 General Election

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YouGov[®]
What the world thinks

Cebr



Consumers and the Economy

Charles Davis, Director, Cebr

The changing consumer economic outlook



Global economic backdrop for UK is increasingly benign as export markets grow faster & inflationary pressures ease

- The world economy is growing slightly faster in 2014 as the Eurozone returns to some sort of growth;
- However Eurozone growth still sluggish so we are seeing action from the European Central Bank to try to kick start faster growth;
- US should grow at reasonable pace in 2014 as Federal Reserve gradually takes foot off accelerator;
- Emerging markets growing less briskly;
- Commodity prices softer & energy prices have weakened too reducing inflationary pressure.

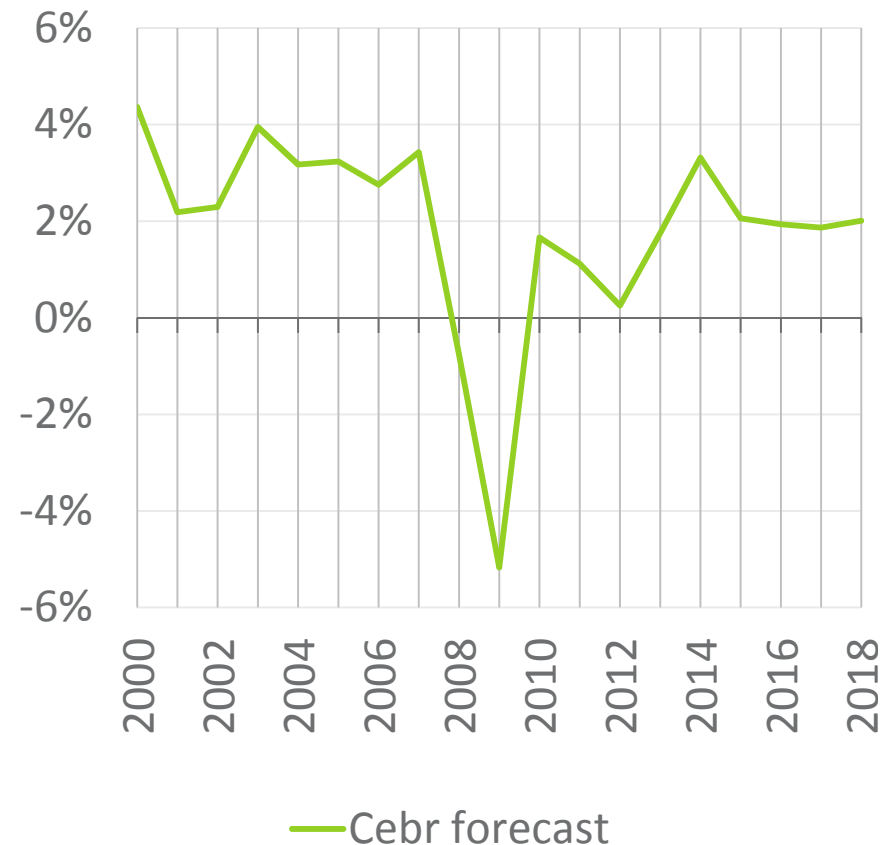
World real GDP, annual percentage growth



UK recording fastest growth in seven years – but can it last? And is the recovery being felt across the country?

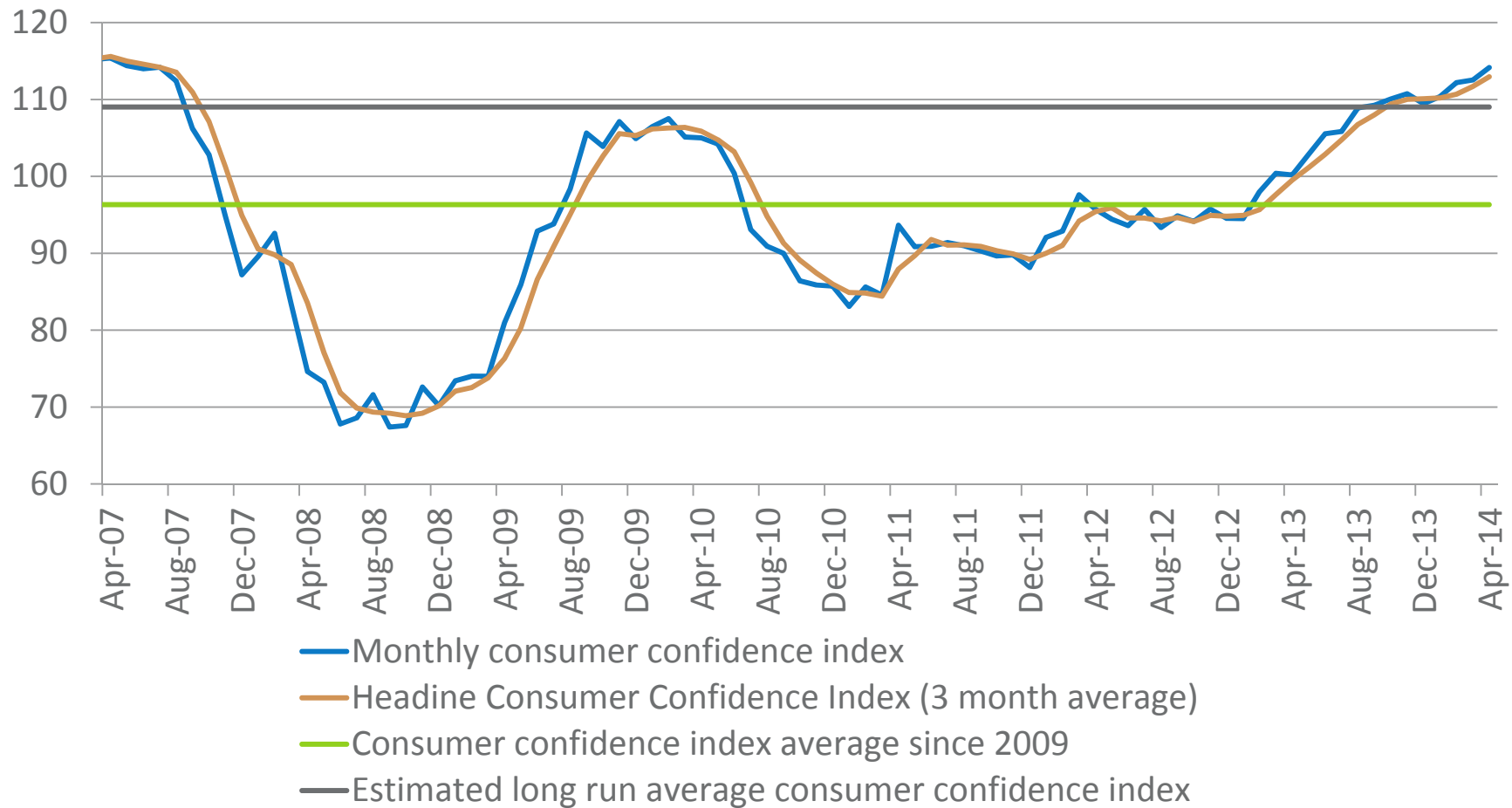
- UK economy is consolidating its acceleration in 2013 & is going to grow at its fastest pace since 2007;
- Businesses are confident – translating into investment and hiring.
- Unemployment has dropped far faster than the Bank of England expected;
- Not yet translating into significant acceleration in pay but squeeze on disposable incomes has eased;
- Public spending cuts to come after next election and interest rates rises so growth will slow over the next couple of years.

UK real GDP, annual percentage change



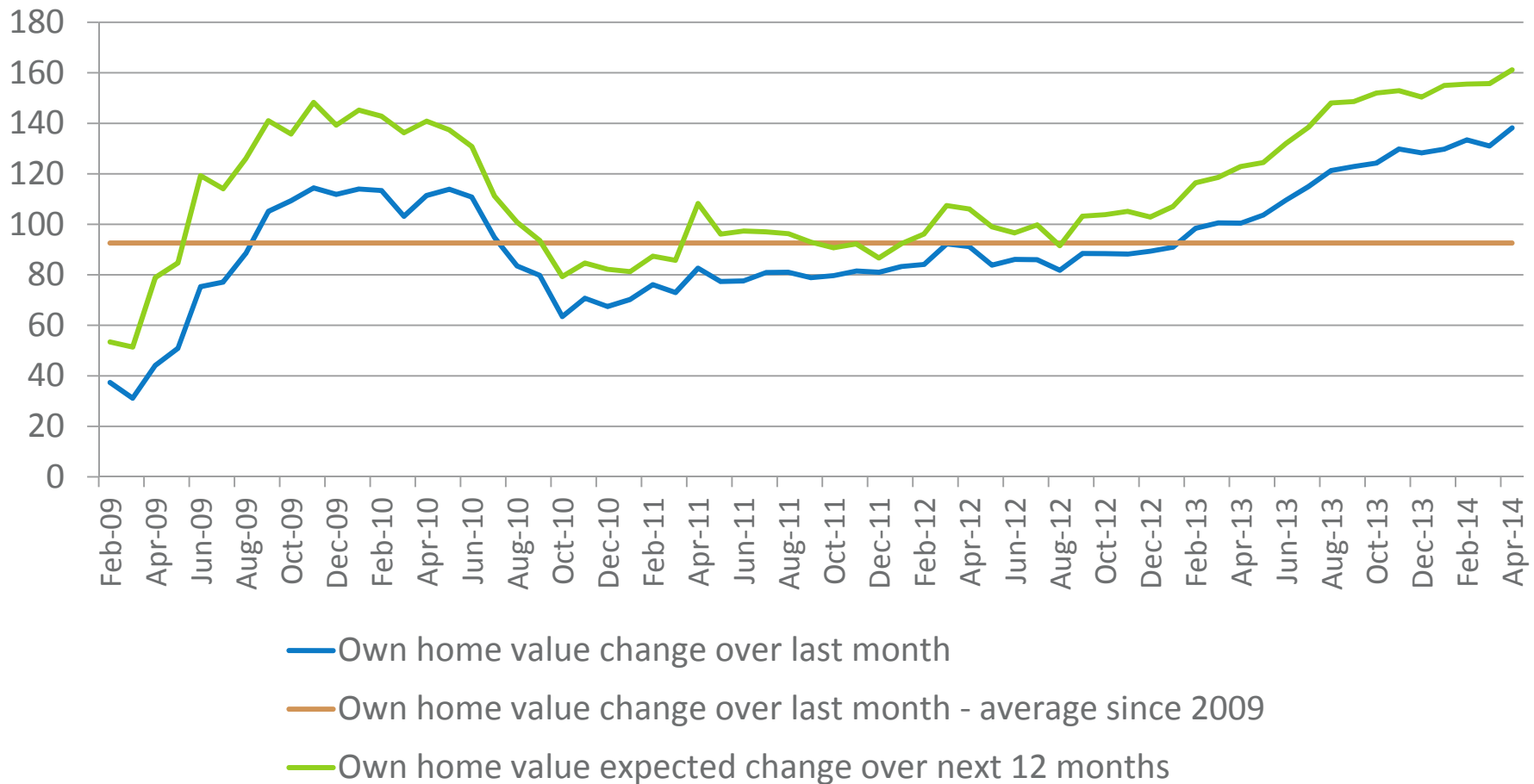
Headline Consumer Confidence Index continues to climb to reach yet another post-crisis high

YouGov / Cebr UK Consumer Confidence Index – scale from 0-200; 100 is neutral



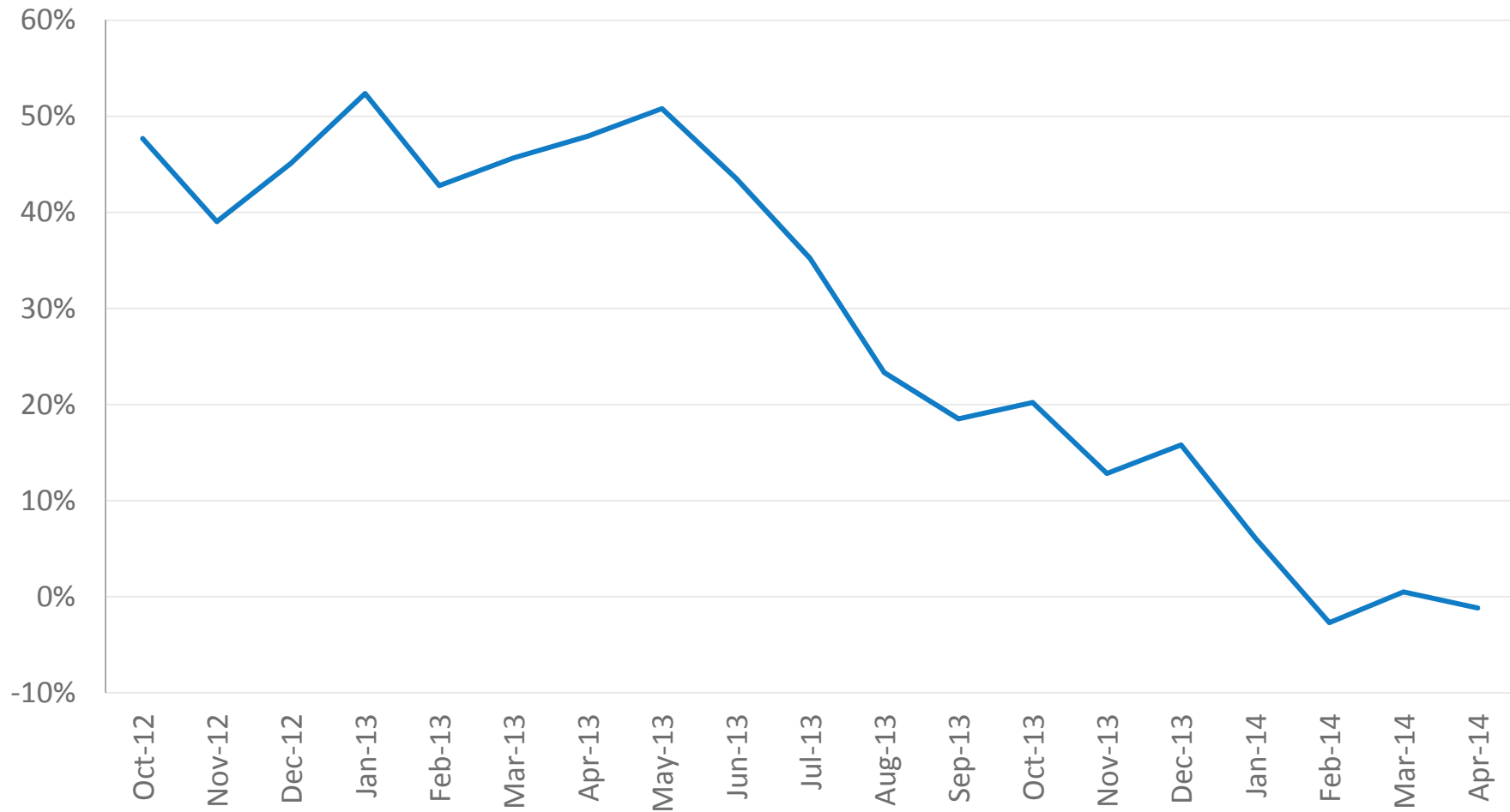
Housing market acceleration drove the increase in confidence; slowing although still spreading across UK

YouGov / Cebr Consumer Confidence Indicator – own home value change over past month & expected change over next 12 months; index 0-200; 100 is neutral



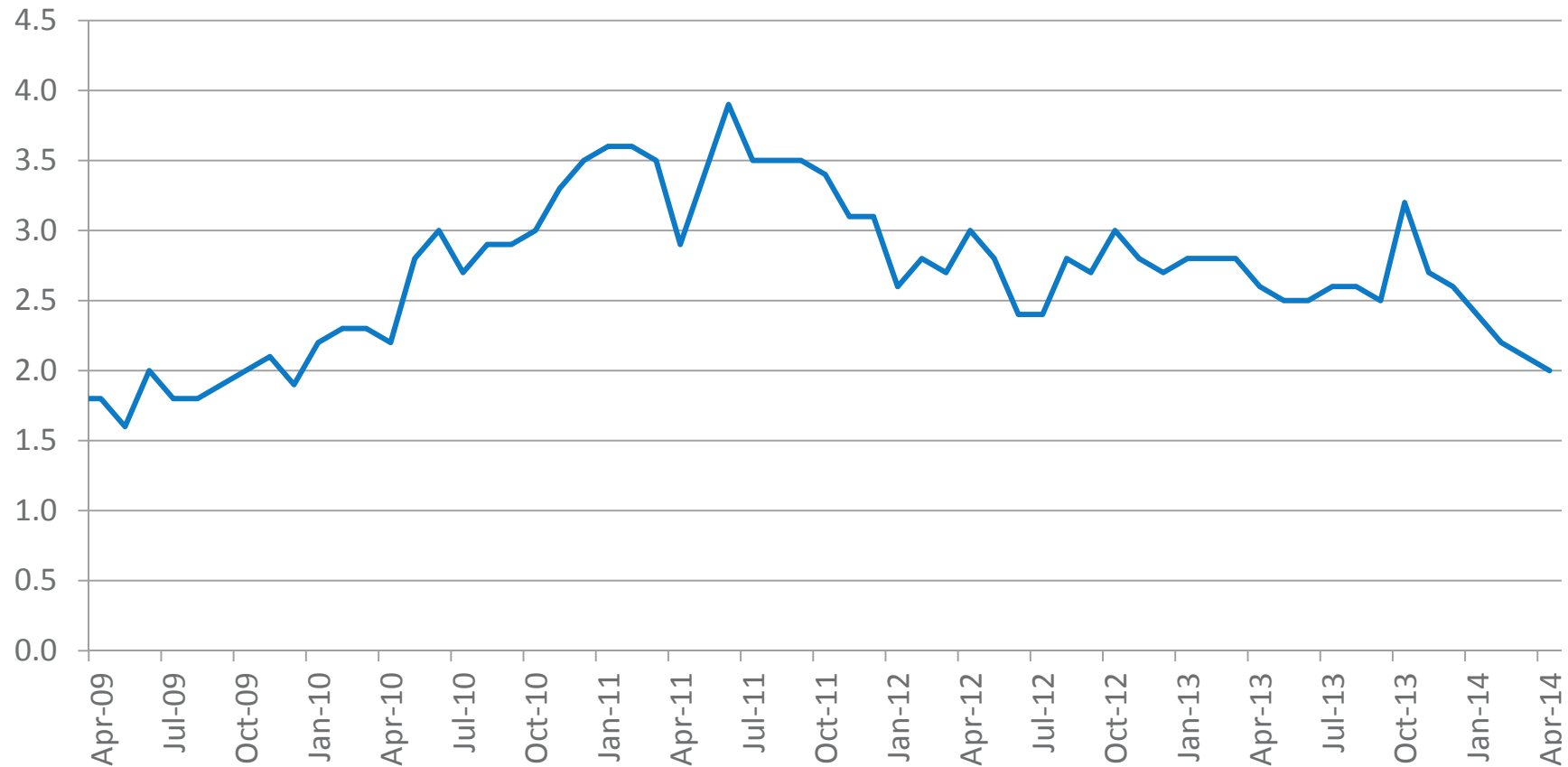
Consumers sense a sustained improvement in the labour market

Net balance expecting unemployment to increase over next 12 months (those expecting increase less those expecting decrease)



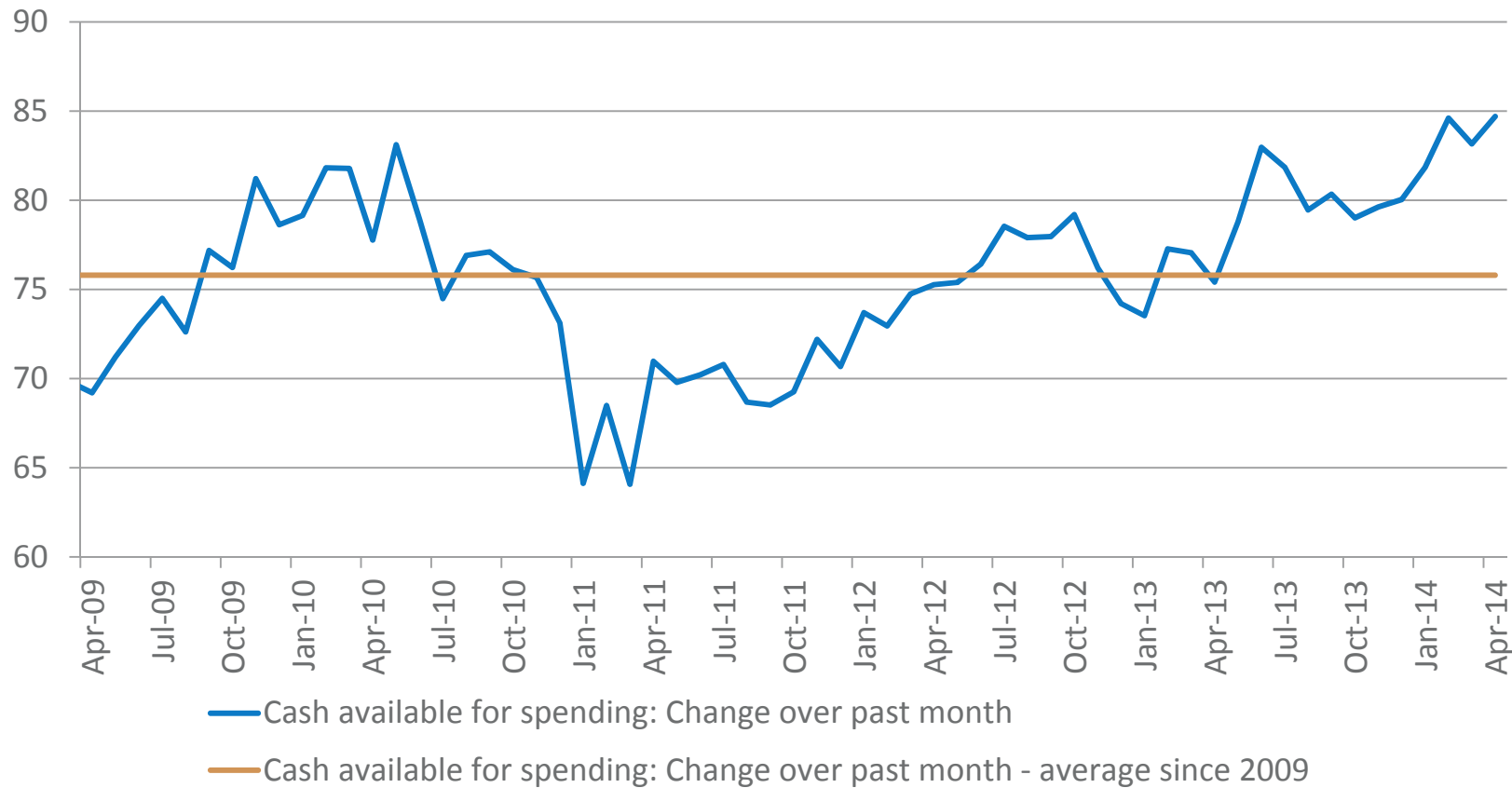
And are benefitting from much reduced pace of increase in the cost of living – inflation expectations at 5 year low

YouGov / Citi: Expected % change in Consumer Prices of Goods & Services in next 12 months



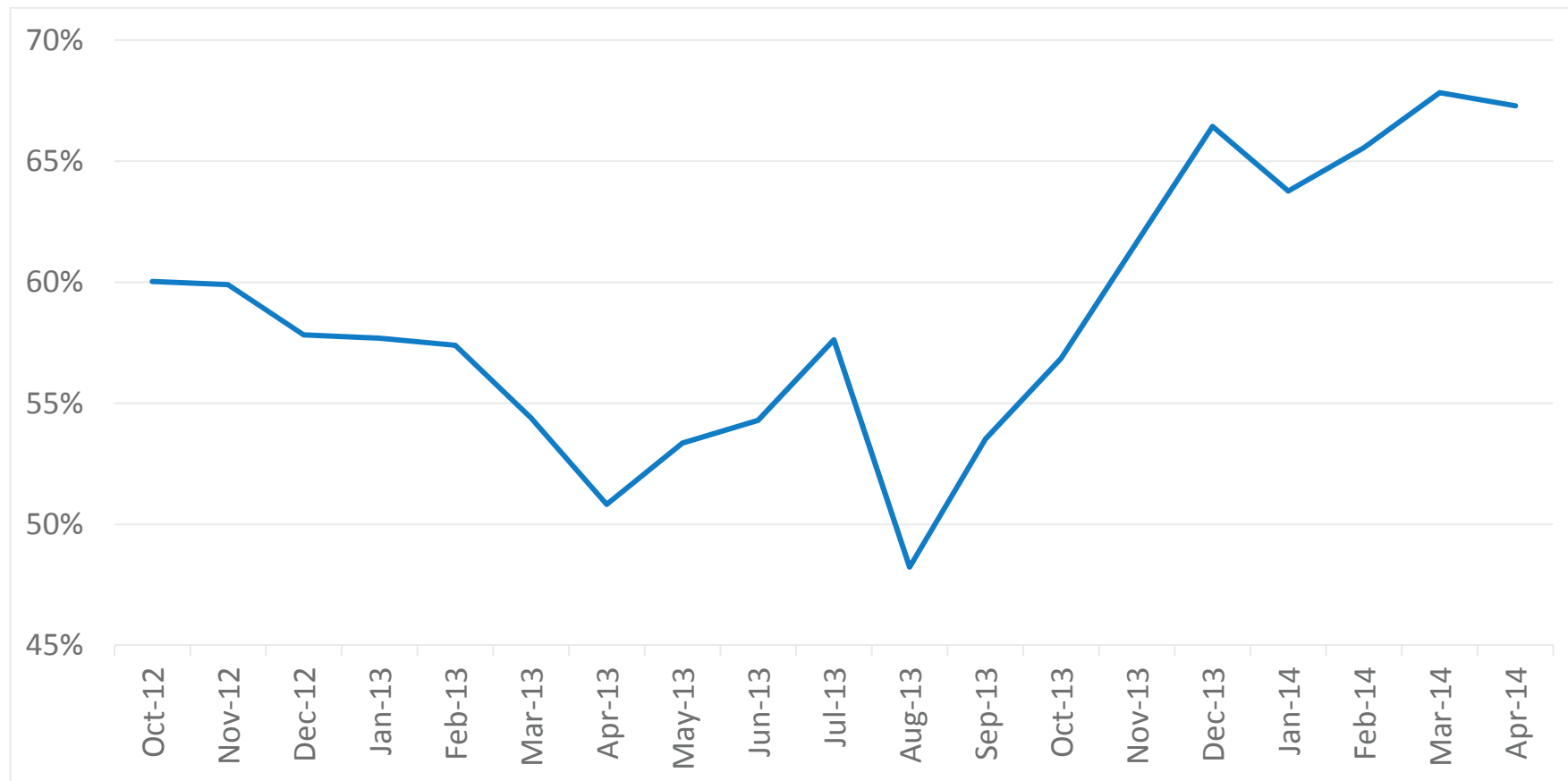
Spending power isn't growing yet but the reported pace of decline has eased & return to growth is getting close

YouGov / Cebr Spare Cash availability indicator – change over past month; index 0-200; 100 is neutral; score beneath 100 implies decline, over 100 an increase



Key challenge ahead will be the gradual rising of interest rates: more than two thirds of consumers expect rate rise

% of consumers expecting interest rates to increase



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Q&A

