

July 2016 **Ipsos Brexit consequences poll**

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Impact of Brexit on the UK

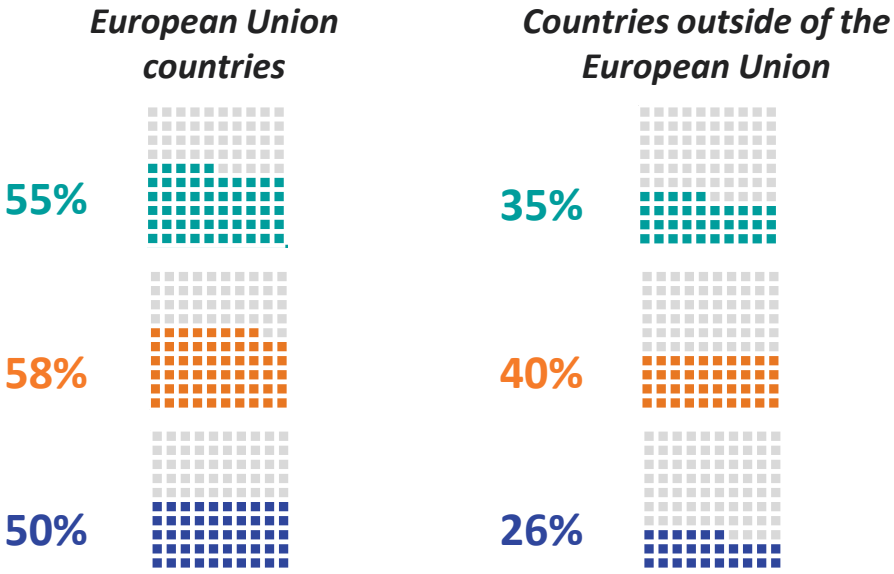
4

Future relationship between European Union and UK



REACTIONS TO THE RESULT

Most in EU countries think Britain was wrong to leave – outside the EU people are less certain

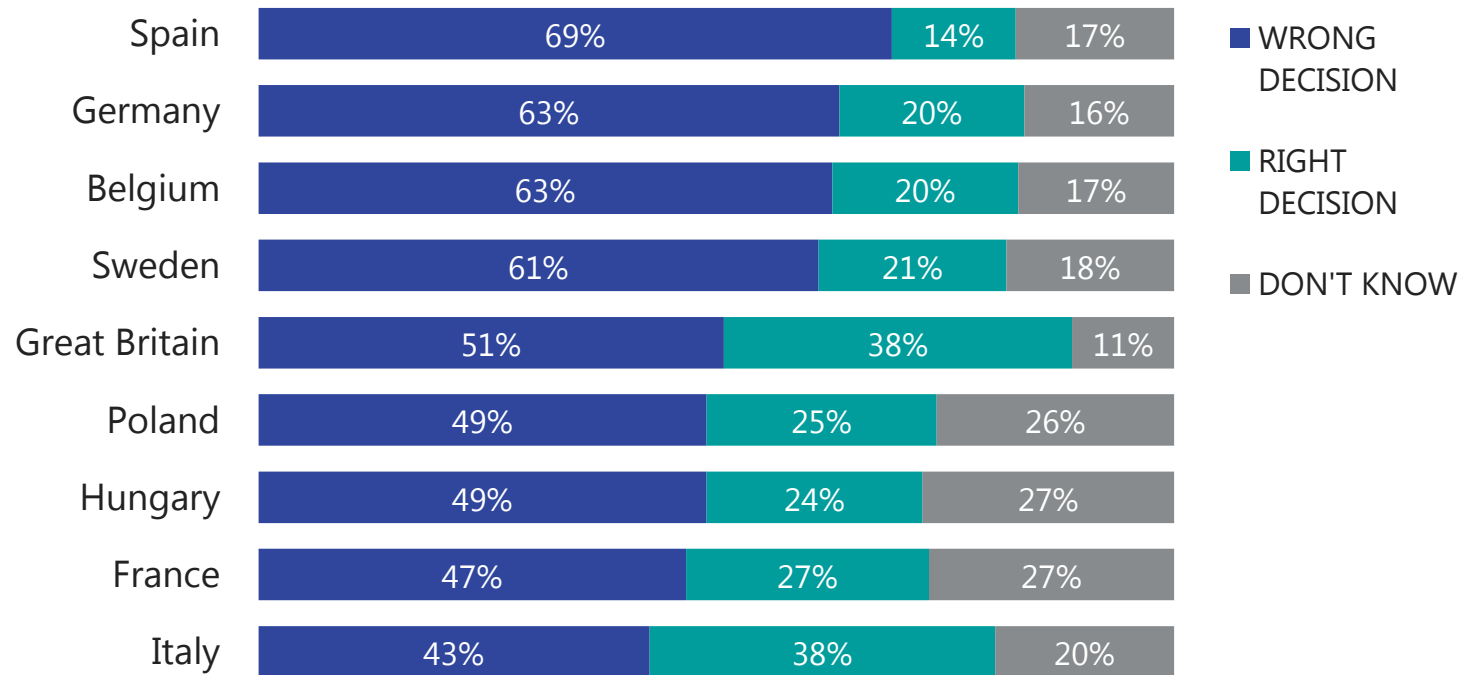


Do you think that Brexit was the right decision or the wrong decision for...Britain/ the European Union/ own country?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

Spanish most likely to think Brexit wrong for Britain - 1/2

European Union countries

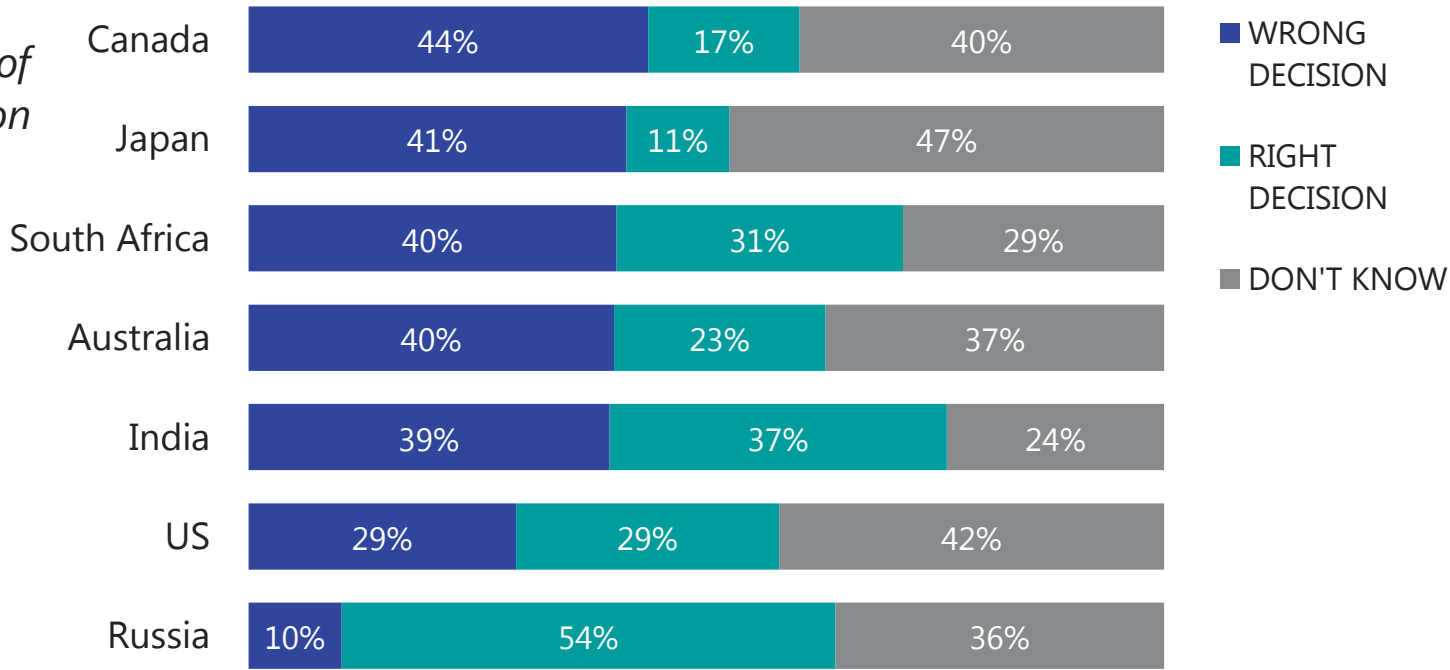


Do you think that Brexit was the right decision or the wrong decision for Britain?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Sweden, United States, July 2016

Spanish most likely to think Brexit wrong for Britain - 2/2

Countries outside of the European Union

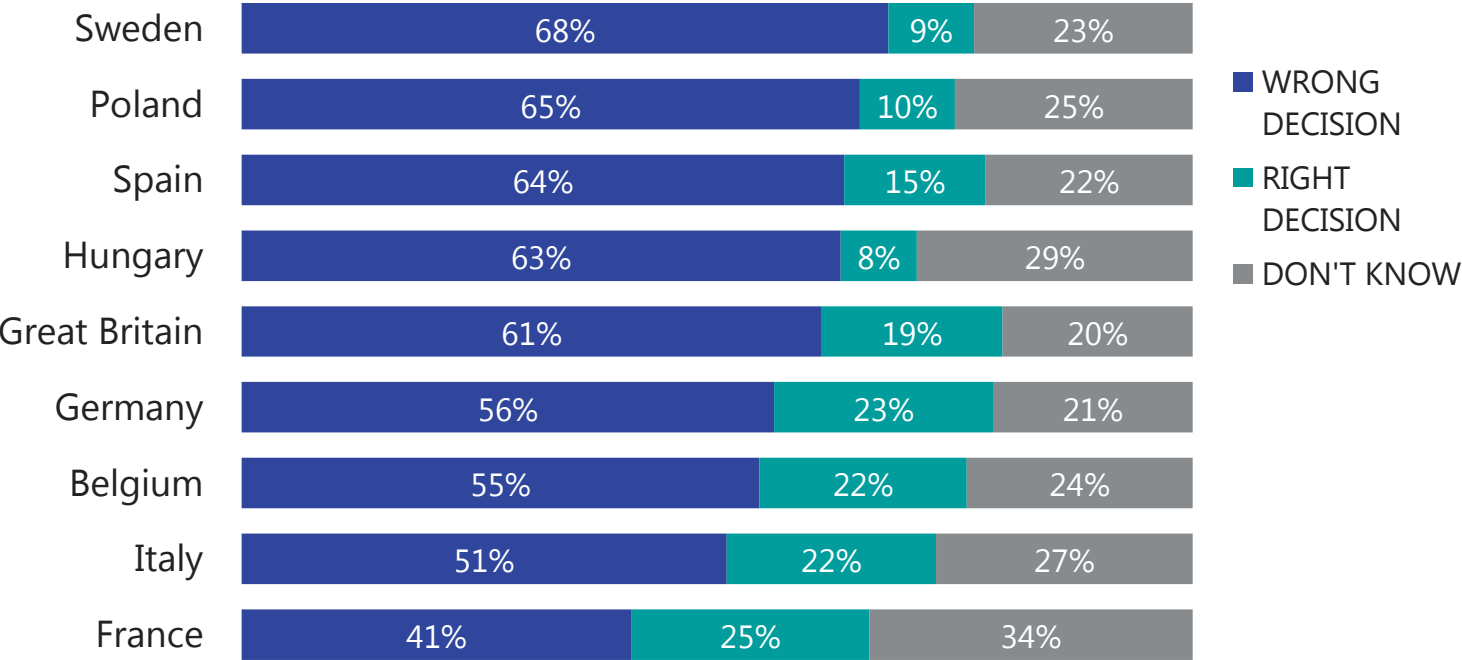


Do you think that Brexit was the right decision or the wrong decision for Britain?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

Swedes most worried about impact on European Union - 1/2

European Union countries

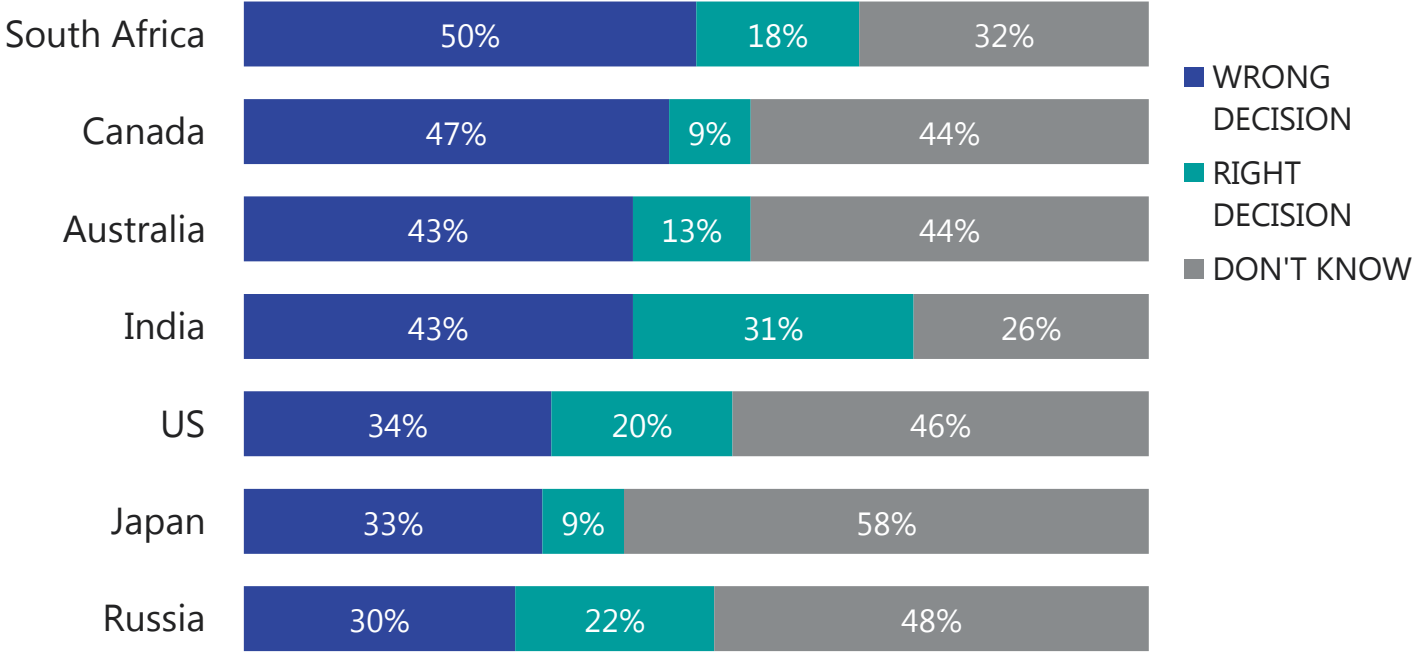


Do you think that Brexit was the right decision or the wrong decision for the European Union?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

Swedes most worried about impact on European Union - 2/2

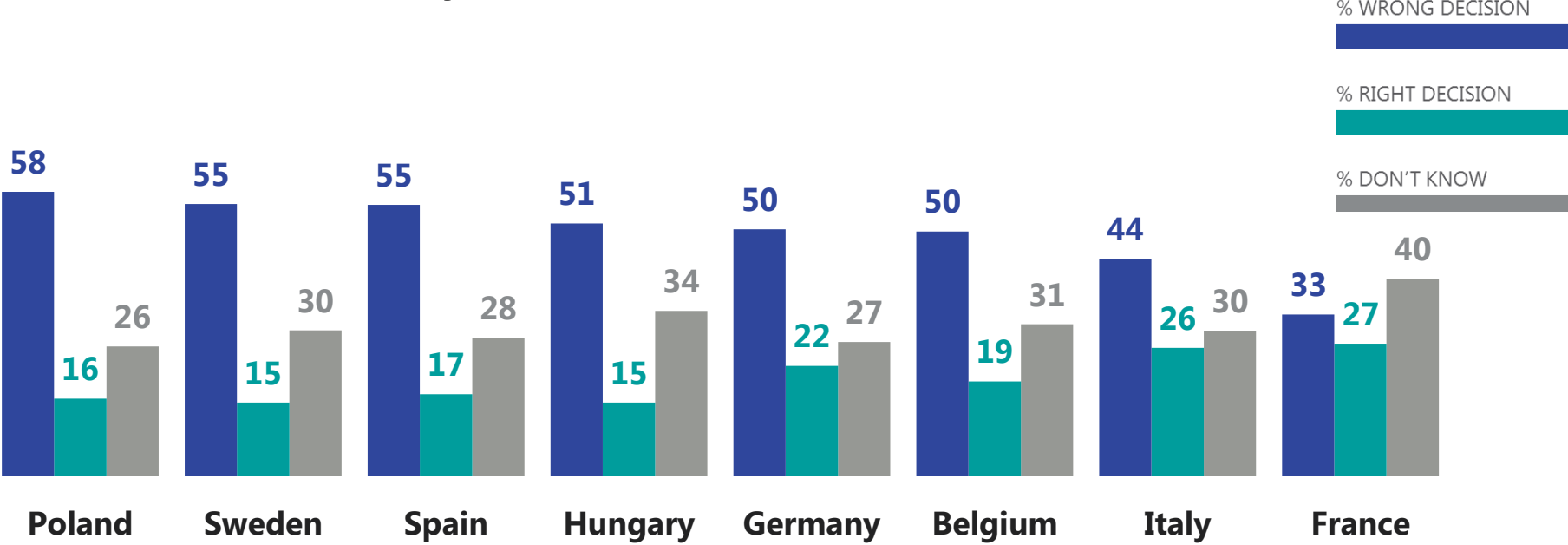
Countries outside of the European Union



Do you think that Brexit was the right decision or the wrong decision for the European Union?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

Poles, Swedes and Spanish most worried about impact of decision for their own country



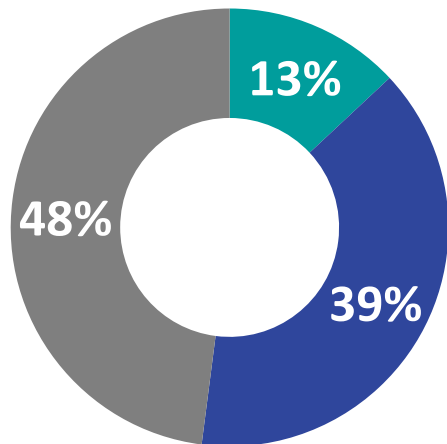
Do you think that Brexit was the right decision or the wrong decision for your own country?

Base: 6,012 adults aged 16-64 across Belgium, France, Germany, Hungary, Italy, Poland, Spain, Sweden, July 2016

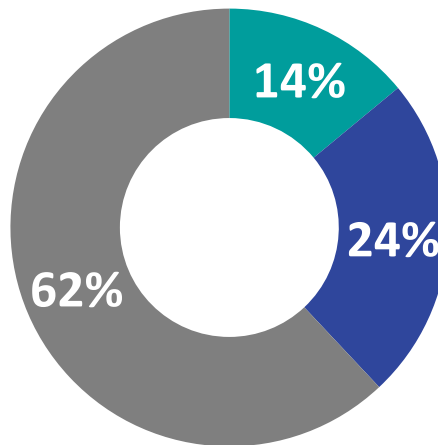
IPSOS BREXIT CONSEQUENCES POLL

4 in 10 in EU countries sad to see UK leave – but more unaffected

European Union countries



Countries outside of the European Union



HAPPY



SAD



NEITHER



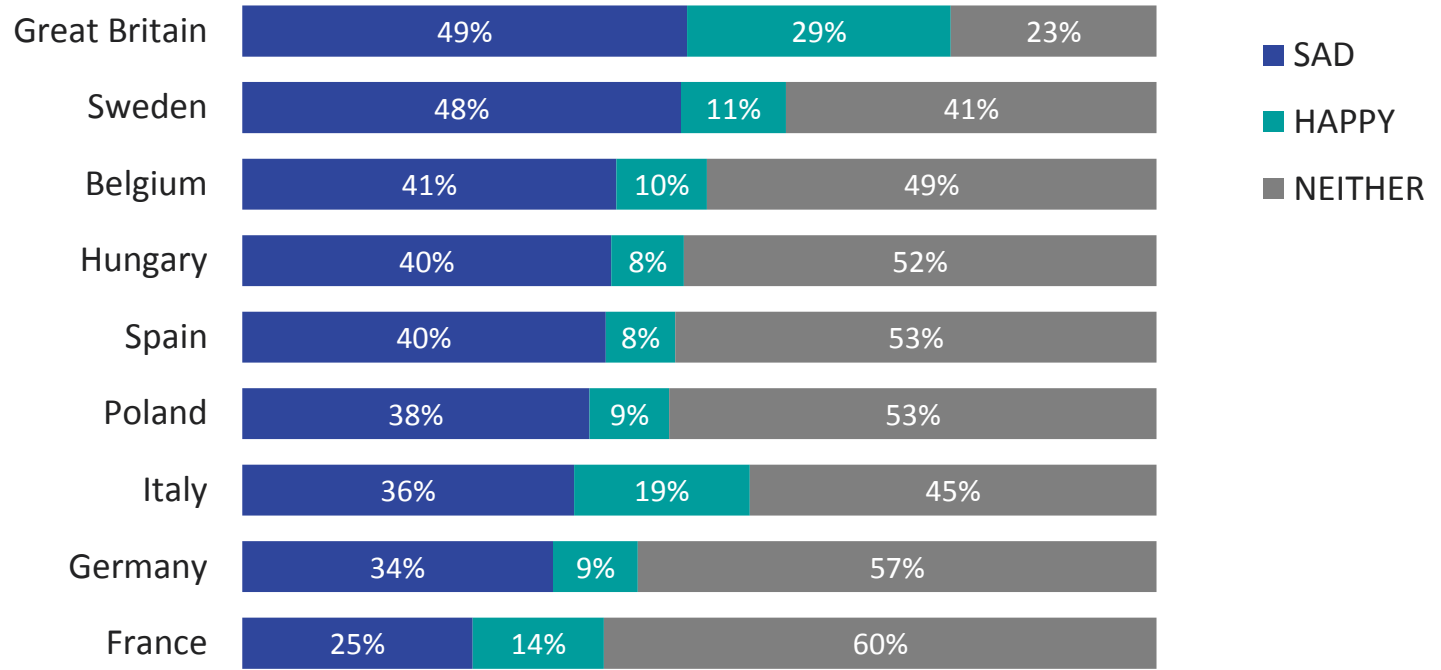
How does the UK's decision to leave the European Union make you feel, if at all – happy, sad or neither?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

IPSOS BREXIT CONSEQUENCES POLL

Brexit and feelings of happiness and sadness - 1/2

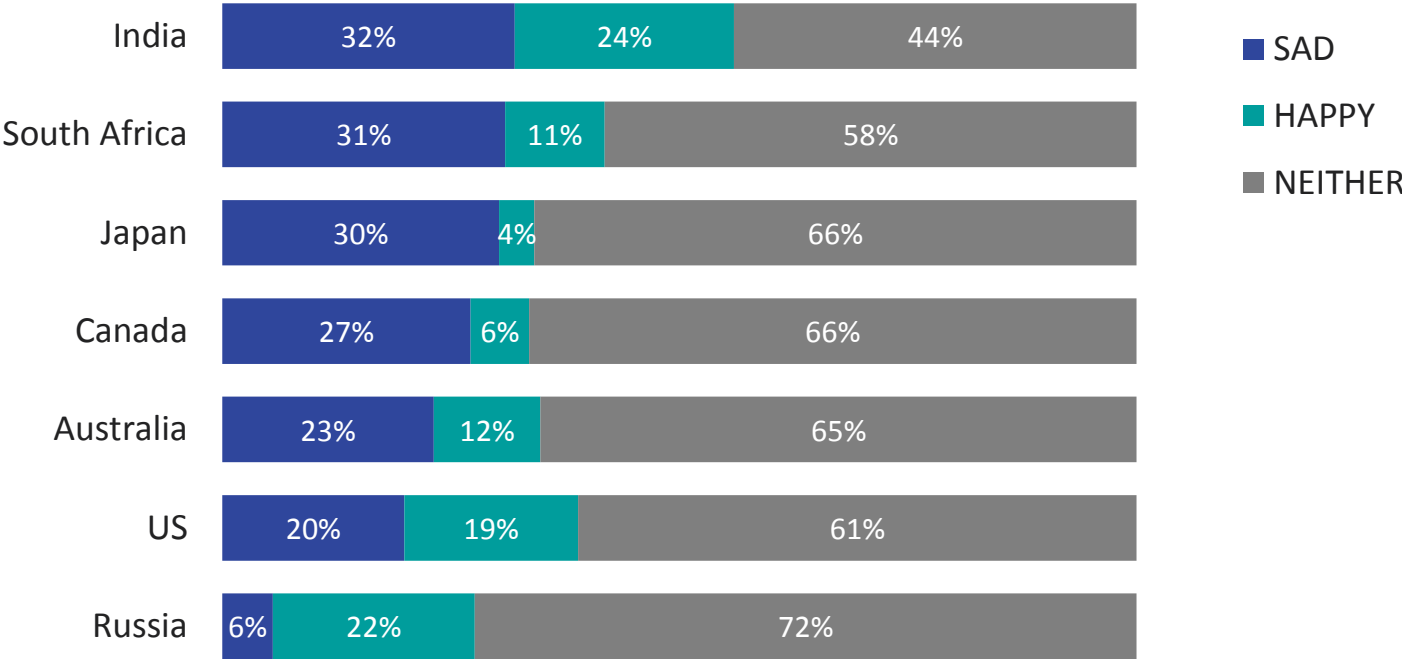
European Union countries



How does the UK's decision to leave the European Union make you feel, if at all - Happy, sad or neither?

Brexit and feelings of happiness and sadness - 2/2

Countries outside of the European Union

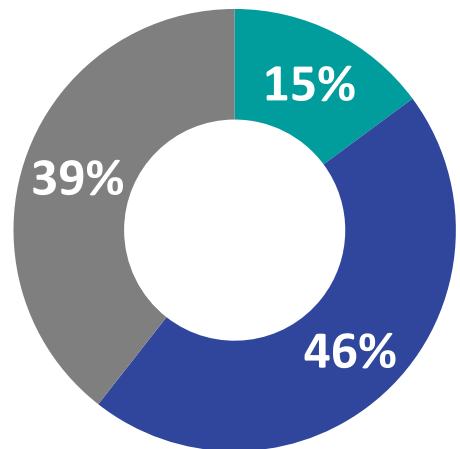


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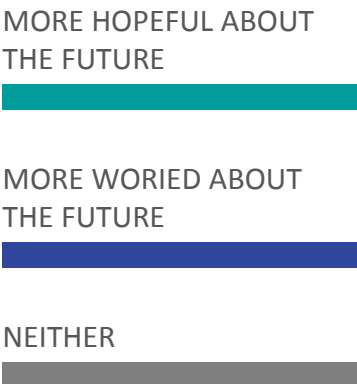
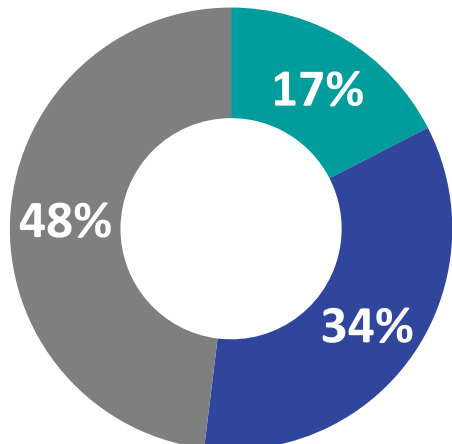
Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

Brexit has made 46% in EU countries more worried for future

European Union countries



Countries outside of the European Union



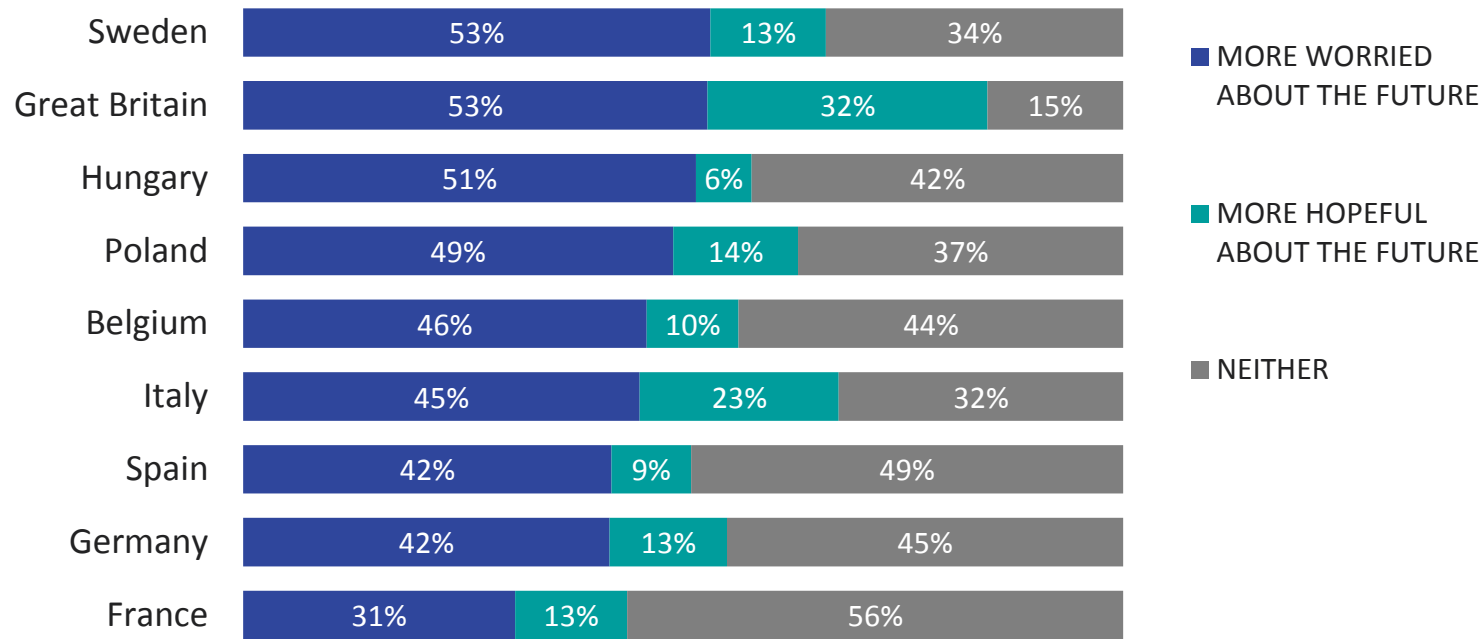
How does the UK's decision to leave the European Union make you feel, if at all - More worried about the future, more hopeful about the future or neither?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

IPSOS BREXIT CONSEQUENCES POLL

In EU, Swedes most worried, French the least - 1/2

European Union countries

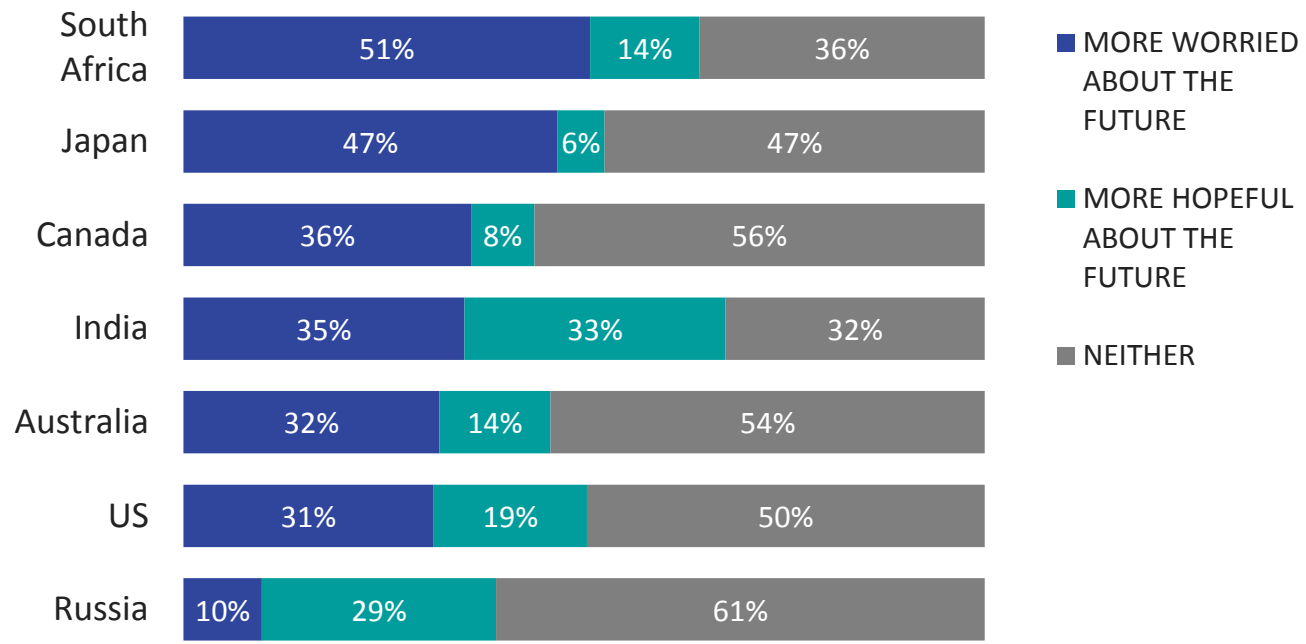


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In EU, Swedes most worried, French the least - 2/2

Countries outside of the European Union



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Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016



IMPACT OF BREXIT ON THE EUROPEAN UNION

IPSOS BREXIT CONSEQUENCES POLL

Most think Brexit will be bad for EU economy

Think that Brexit will be somewhat to very negative for the European Union's economy



Think that Brexit will be somewhat to very negative for the European Union's influence on the world stage



Think Brexit vote will make EU weaker

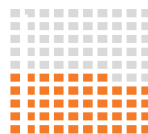


European Union countries

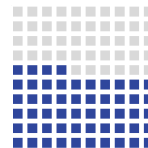
53%



47%

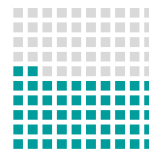


54%

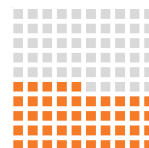


Countries outside of the European Union

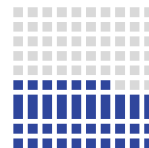
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45%



47%

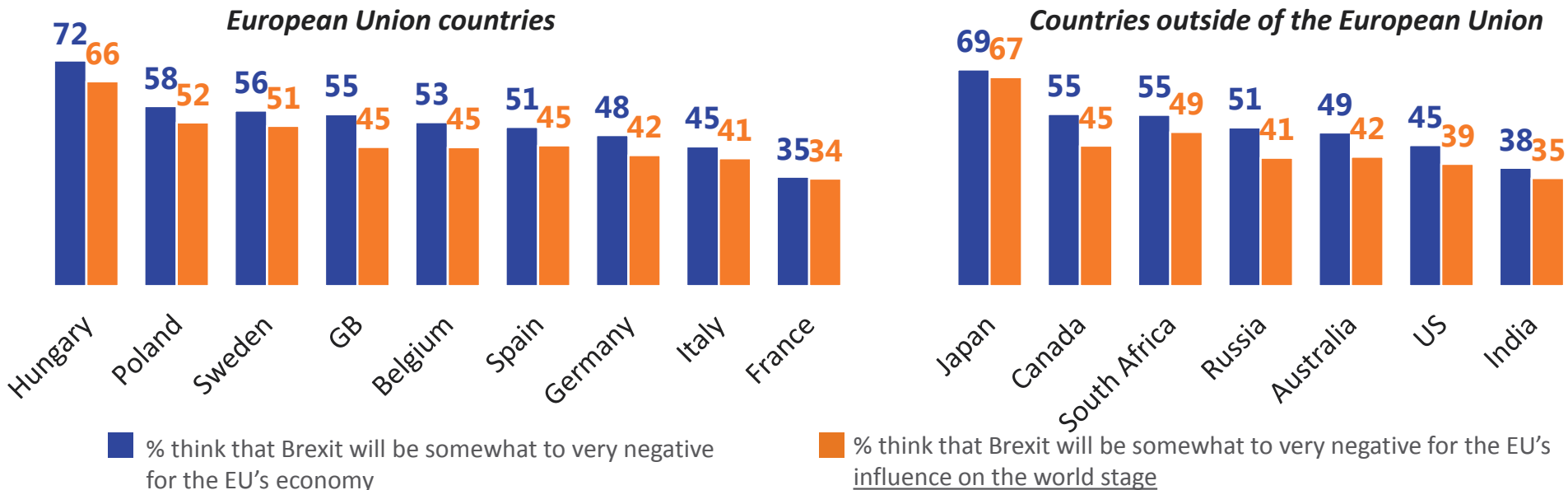


Now that the UK has voted to leave the European Union, do you think it will have a positive or negative impact, or make no difference, on...the EU's economy / influence on the world stage? & Following on from the UK's vote to leave the European Union, do you think the EU will be weaker/ stronger

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

IPSOS BREXIT CONSEQUENCES POLL

Hungarians and Japanese most likely to think EU will be negatively affected – French the least

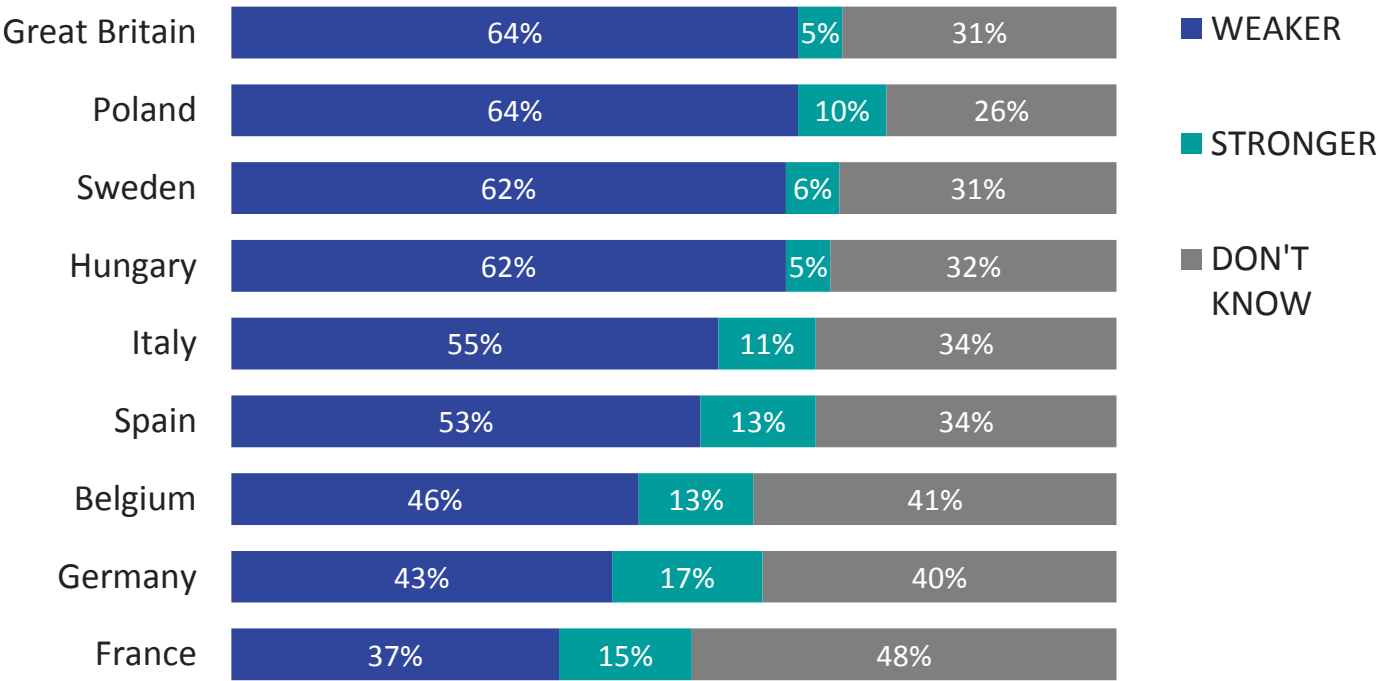


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Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

Big differences on whether Brexit will weaken the EU - 1/2

European Union countries

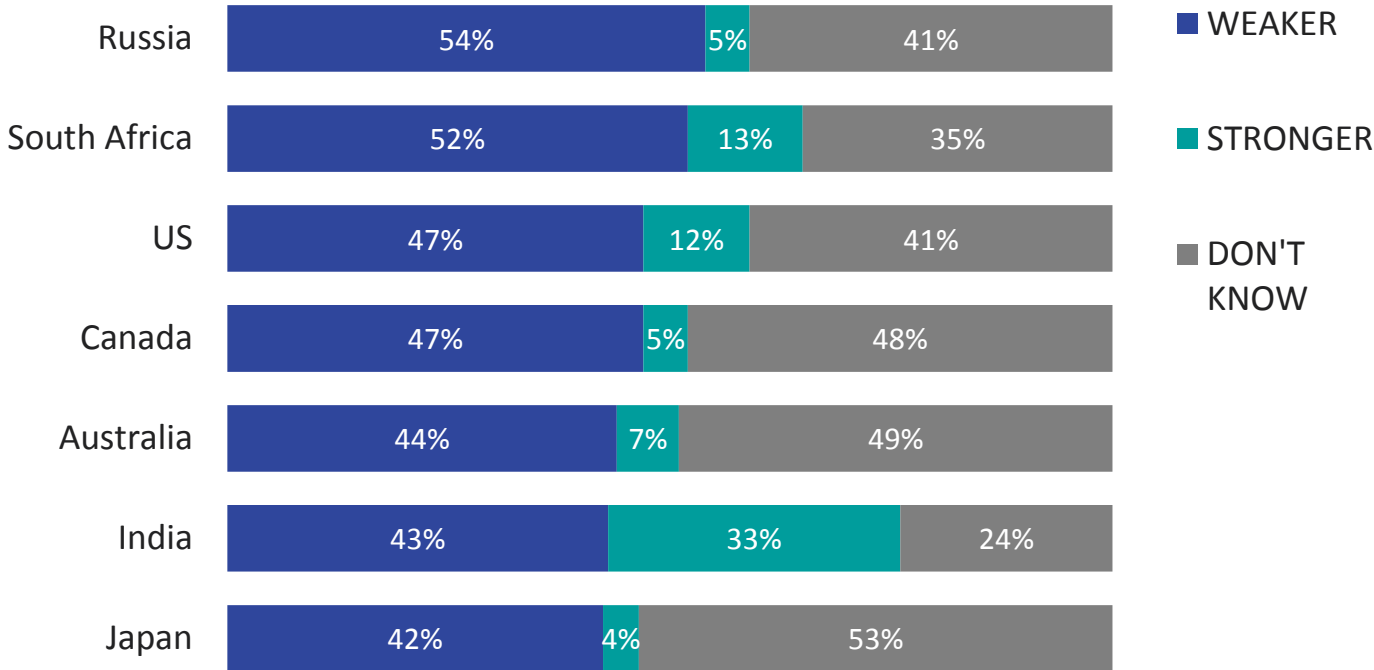


Following on from the UK's vote to leave the European Union, do you think the European Union will be stronger or weaker?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

Big differences on whether Brexit will weaken the EU - 2/2

Countries outside of the European Union

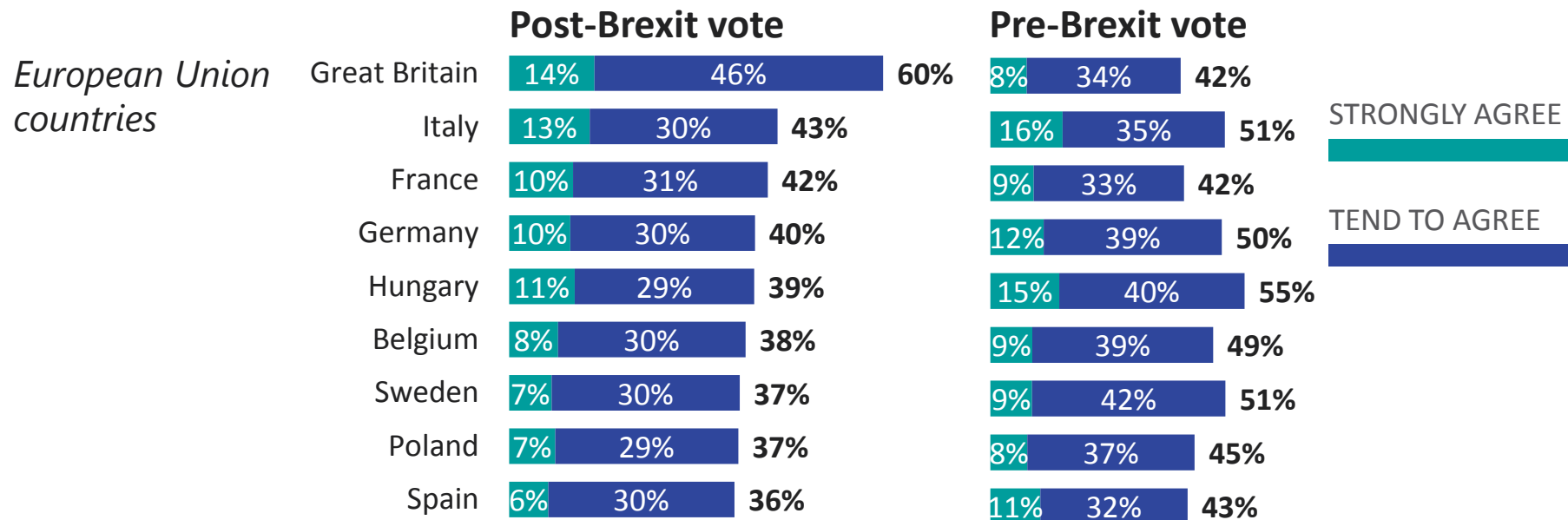


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IPSOS BREXIT CONSEQUENCES POLL

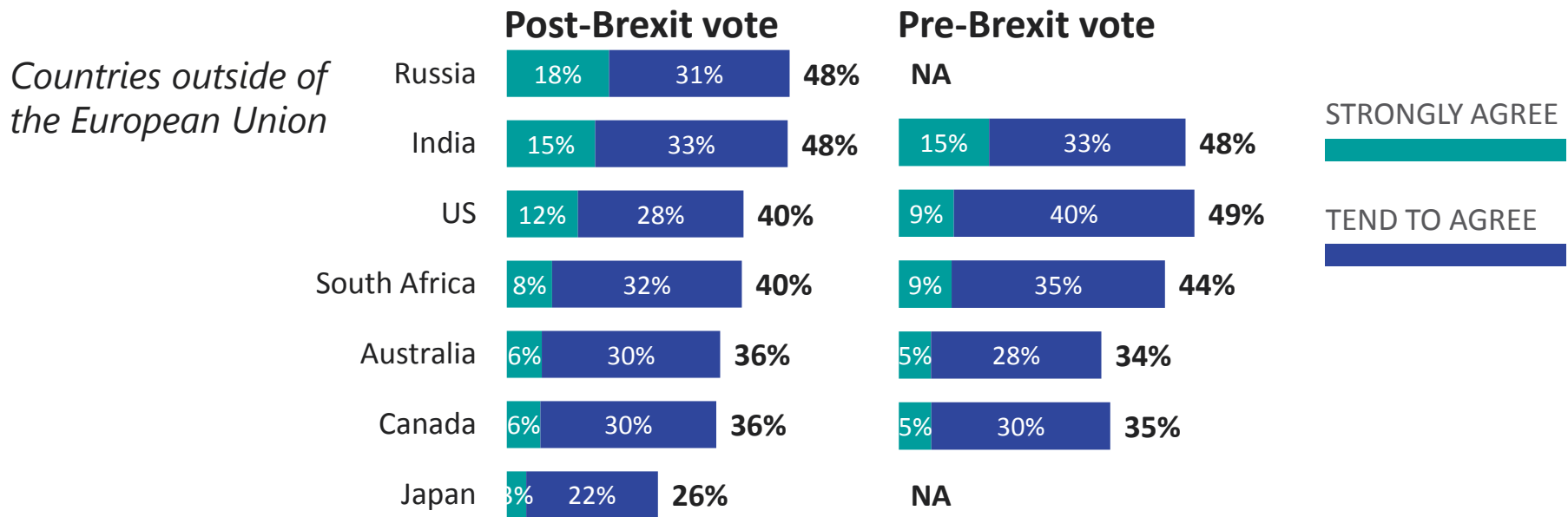
41% in EU countries think Brexit will lead to 'domino' effect – down from 48% pre-vote (but up in GB) - 1/2



To what extent do you agree or disagree with the following statement? Now Britain has left the European Union/ If Britain left the European Union...other countries will follow

IPSOS BREXIT CONSEQUENCES POLL

41% in EU countries think Brexit will lead to ‘domino’ effect – down from 48% pre-vote (but up in GB) - 2/2



To what extent do you agree or disagree with the following statement? Now Britain has left the European Union/ If Britain left the European Union...other countries will follow

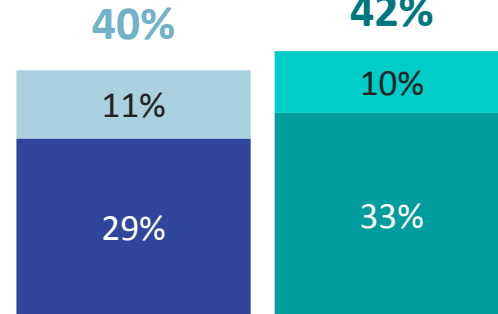
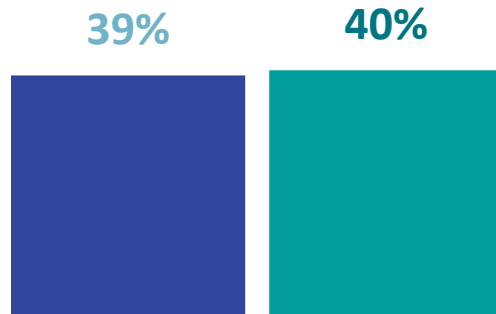
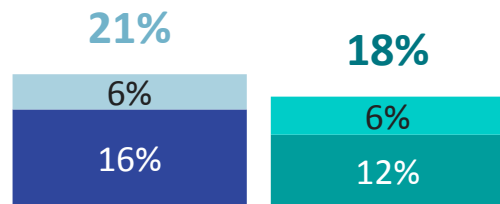
Base July 2016: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016 & Base April 2016: 11,030 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy,, Poland, South Africa, Spain, Sweden and the United States, July 2016

What will the future European Union look like?

Be more integrated

Resemble today's EU

Be less integrated



- ...have a single European government
- + ...be more integrated, with more powers for the European Union compared to individual countries

- ...resemble today's European Union, with the same balance of powers between the EU and individual countries

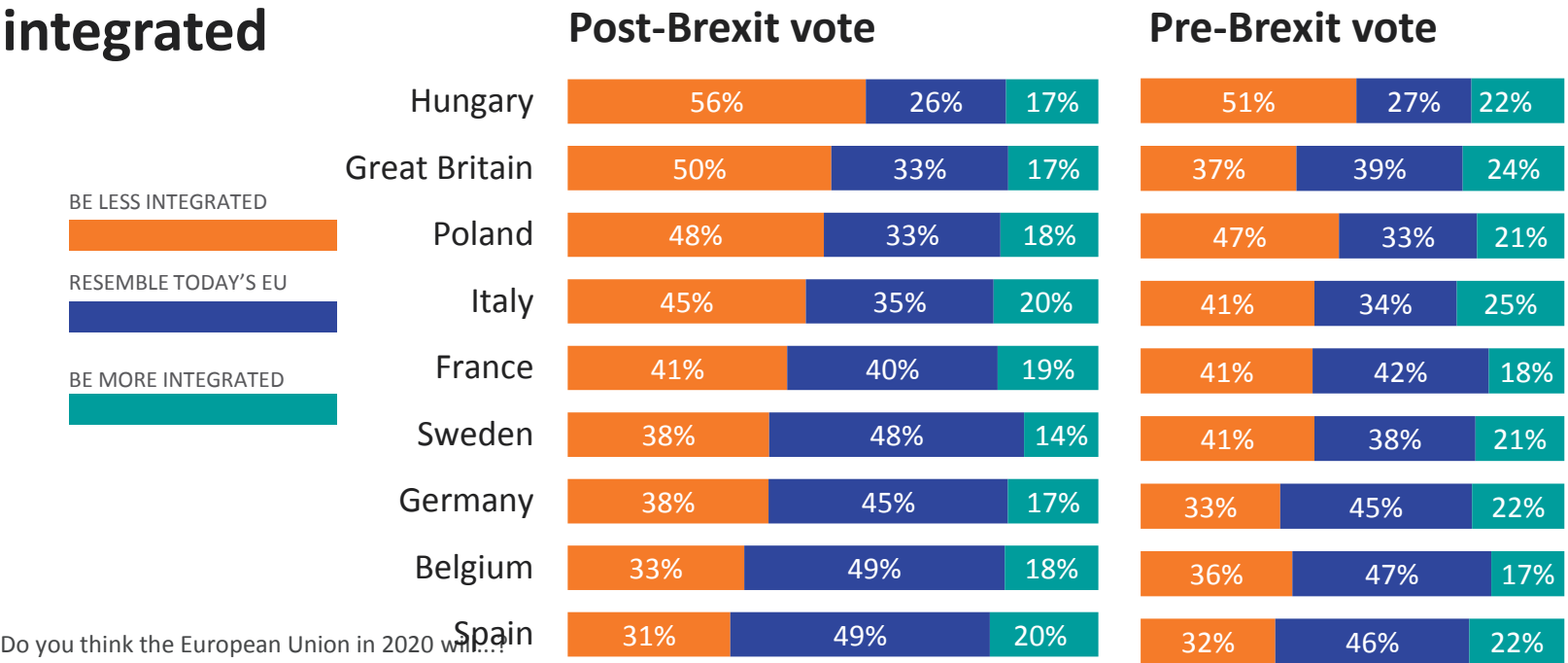
- ...have disappeared altogether
- + ...be less integrated, with fewer powers for the European Union compared to individual countries

Results before the referendum (April 2016) Results after the referendum (July 2016)

Do you think the European Union in 2020 will...?

Base April 2016: 7,022 adults aged 16-64 across Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, Sweden/ Base July 2016: 7,014 adults aged 16-64 across Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, Sweden

Hungarians most likely to think EU will be less integrated in 2020, and since the Brexit vote Britons more likely to think EU will be less integrated



Do you think the European Union in 2020 will...

Base April 2016: 7,022 adults aged 16-64 across Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, Sweden/ Base July 2016: 7,014 adults aged 16-64 across Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, Sweden



IMPACT OF BREXIT ON THE UK

GAME CHANGERS



IPSOS BREXIT CONSEQUENCES POLL

Most in EU countries think that Brexit will harm UK – but outside the EU many do not know

Think that Brexit will be somewhat to very negative for Britain's economy



Think that Brexit will be somewhat to very negative for Britain's influence on the world stage



Think that Brexit will make Britain weaker



European Union countries

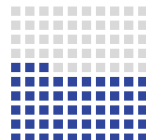
58%



52%



53%

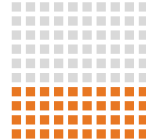


Countries outside of the European Union

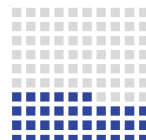
46%



40%



36%

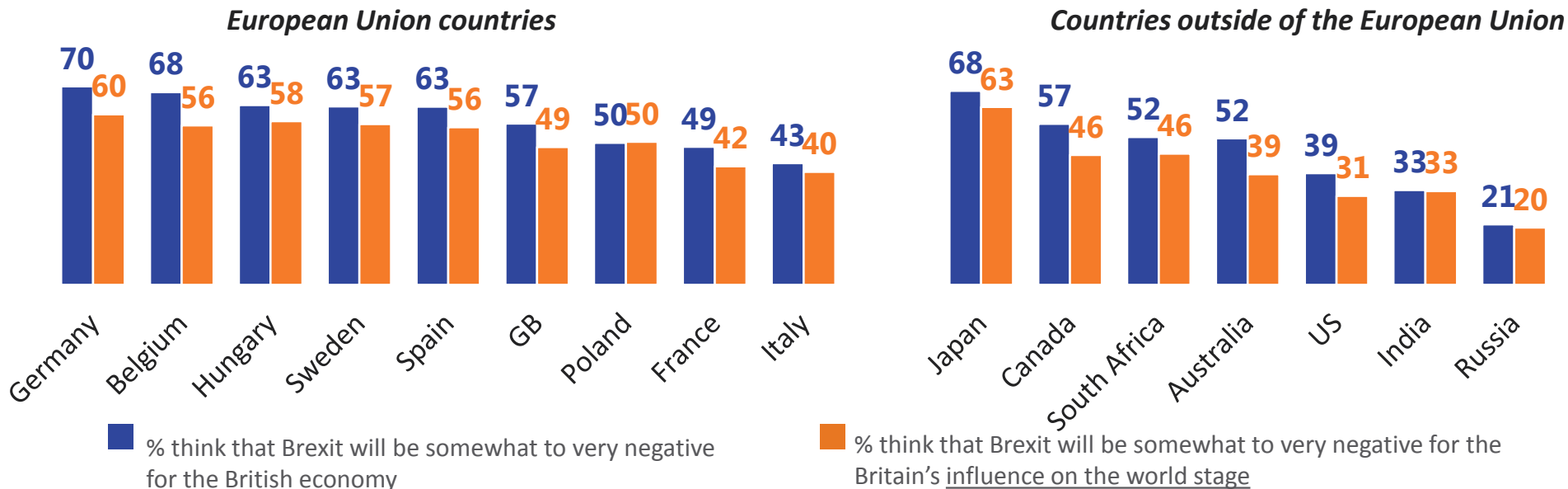


Now that the UK has voted to leave the European Union, do you think it will have a positive or negative impact, or make no difference, on...the UK's economy / influence on the world stage? & Following on from the UK's vote to leave the European Union, do you think the UK will be weaker/ stronger

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Japan, Italy, Poland, Russia, South Africa, Spain, Sweden, United States, July 2016

IPSOS BREXIT CONSEQUENCES POLL

Germans, Japanese and Belgians most likely to think Britain's economy will be harmed by Brexit



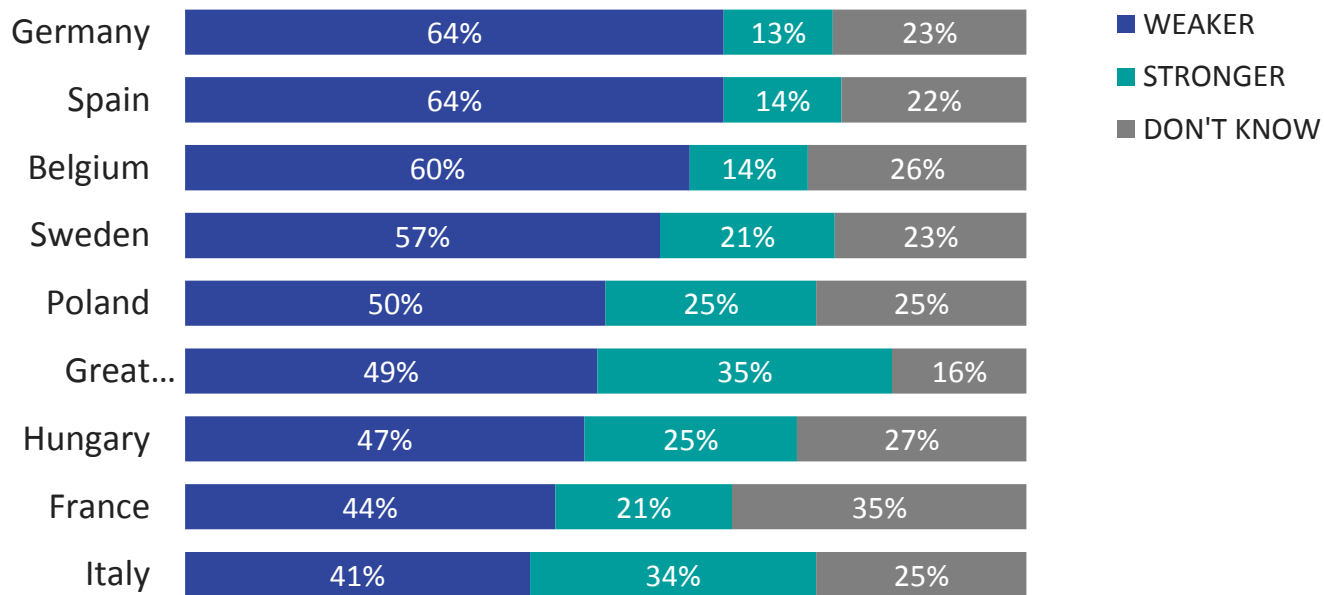
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IPSOS BREXIT CONSEQUENCES POLL

Germans and Spanish most likely to think Brexit will weaken Britain – but Indians and Russians think GB will be stronger out - 1/2

European Union countries

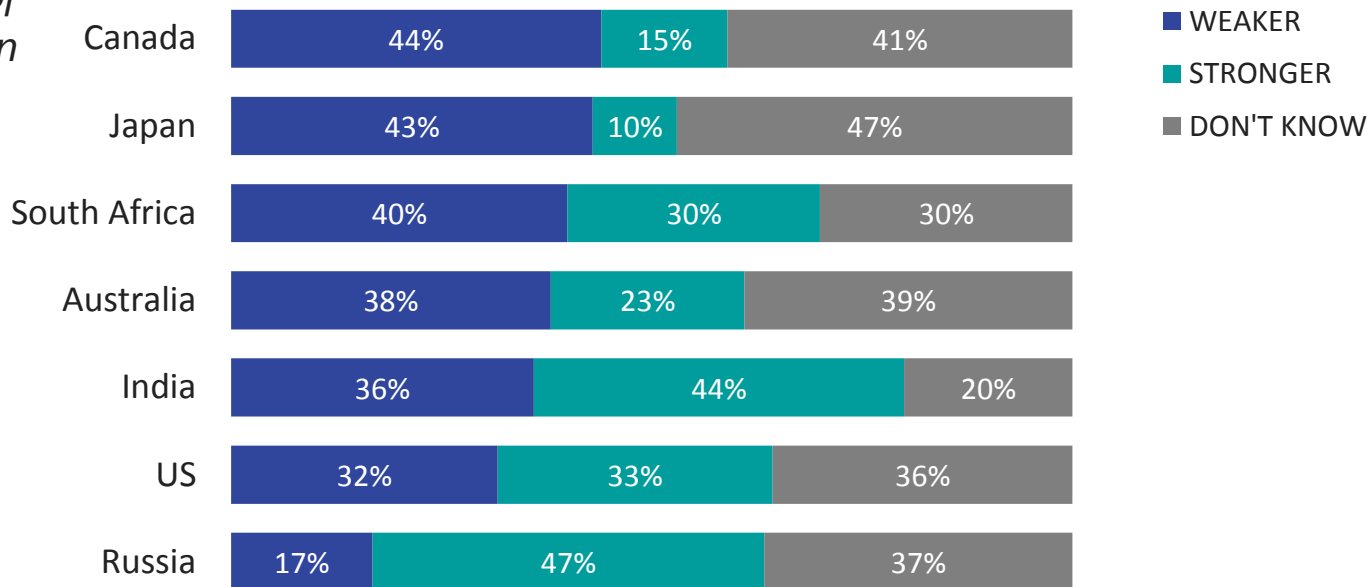


Following on from the UK's vote to leave the European Union, do you think the UK will be stronger or weaker?

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

Germans and Spanish most likely to think Brexit will weaken Britain – but Indians and Russians think GB will be stronger out - 2/2

Countries outside of the European Union



Following on from the UK's vote to leave the European Union, do you think the UK will be stronger or weaker?

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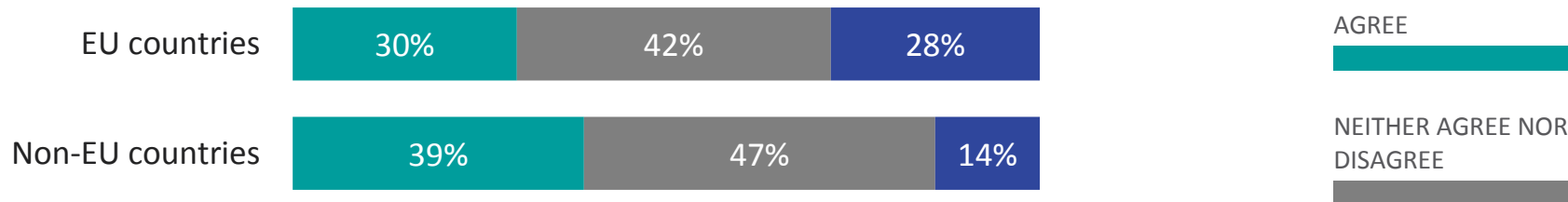
FUTURE OF BRITAIN'S RELATIONSHIP WITH EUROPE

GAME CHANGERS



EU countries split on severity of deal Britain should get – but outside EU more think it should be favourable

The European Union should offer favourable terms to Britain



The European Union should offer unfavourable terms to Britain



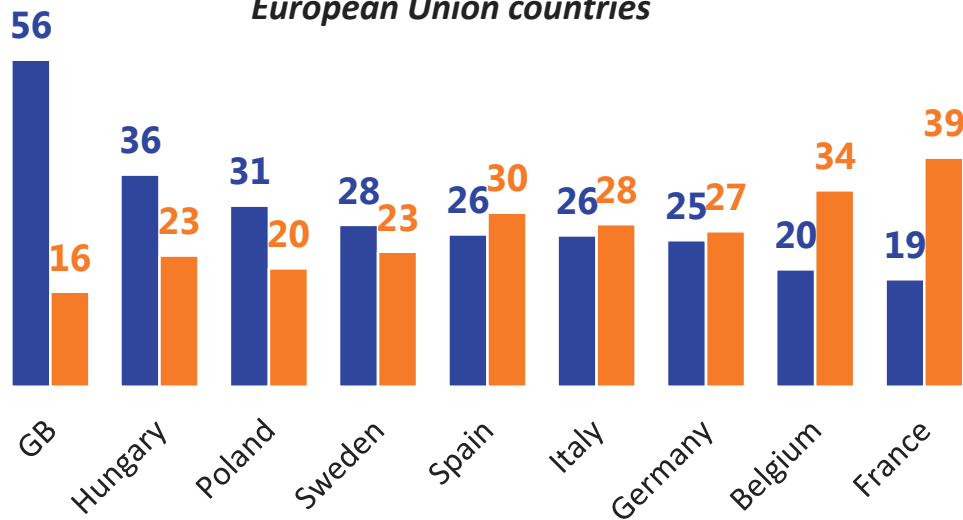
To what extent do you agree or disagree with the following statements? - The European Union should offer favourable/ unfavourable terms to Britain in negotiations about their future relationship to reduce the negative impact on the economy overall/in order to discourage other countries from leave the European Union

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

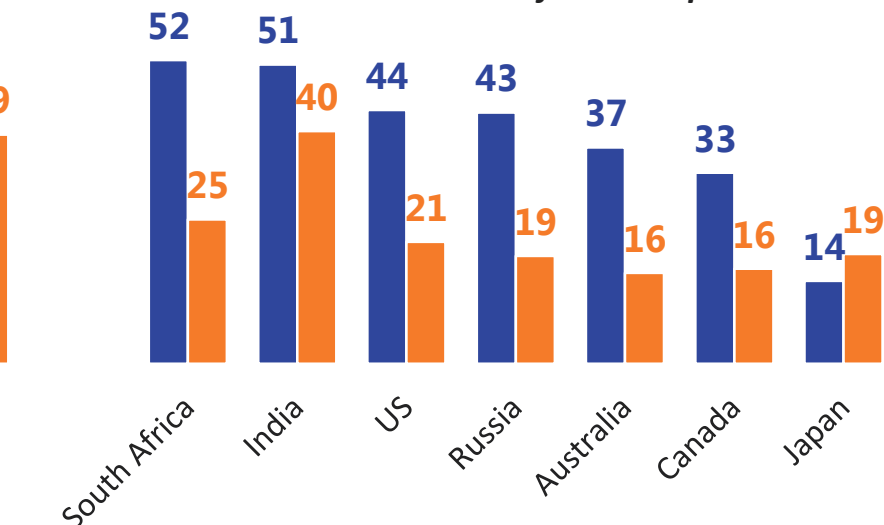
IPSOS BREXIT CONSEQUENCES POLL

Britons think they should get a favourable deal – but French and Belgians think priority is to stop others from leaving

European Union countries



Countries outside of the European Union



■ % think that EU should offer favourable terms to Britain

■ % think that EU should offer unfavourable terms to Britain

To what extent do you agree or disagree with the following statements? - The European Union should offer favourable/ unfavourable terms to Britain in negotiations about their future relationship to reduce the negative impact on the economy overall/in order to discourage other countries from leave the European Union

Base: 12,525 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Great Britain, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

IPSOS BREXIT CONSEQUENCES POLL

One in four in EU countries say less likely to visit the UK or buy British – but most say it will make no difference

Visit the UK on holidays

EU countries (excl. UK)



Non-EU countries



Welcome British tourists to your country

EU countries (excl. UK)



Non-EU countries



Buy British goods or services

EU countries (excl. UK)



Non-EU countries



Consume British culture, such as TV, films, books or music

EU countries (excl. UK)



Non-EU countries



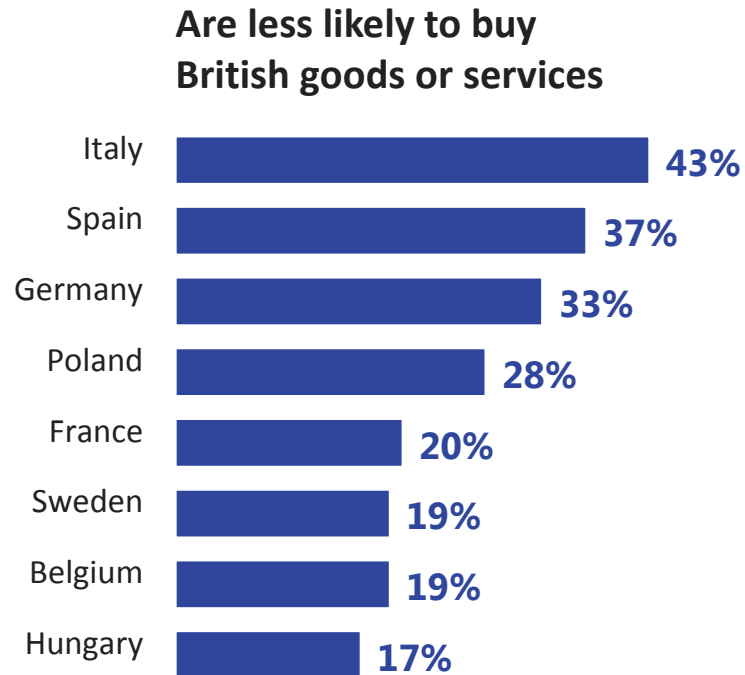
After the UK's vote to leave the EU, are you more likely or less likely to do each of the following, or does it make no difference?



Base: 11,523 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016

Italians and Spanish most likely to be put off buying British - 1/2

European Union countries



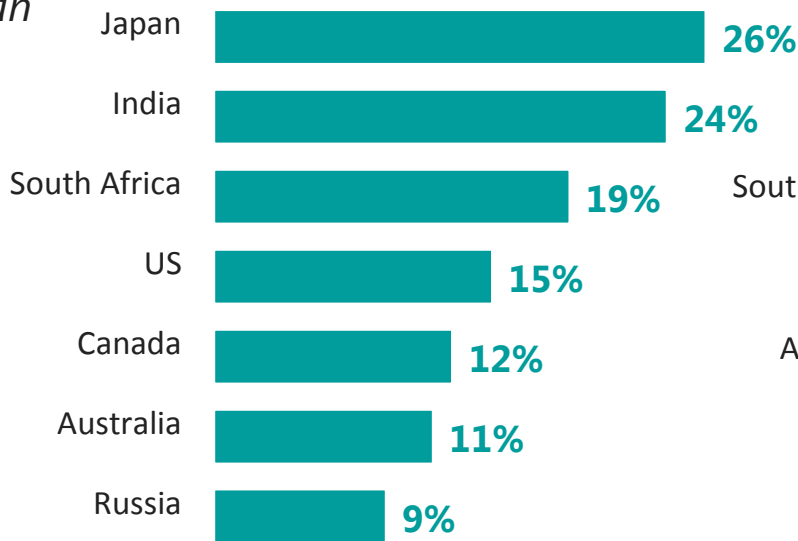
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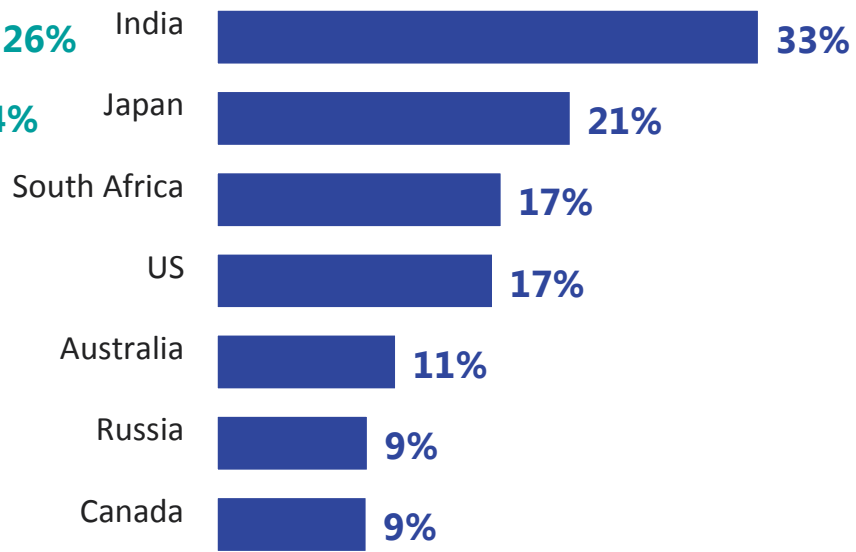
Italians and Spanish most likely to be put off buying British - 2/2

Countries outside
of the European
Union

Are less likely to visit the UK
on holidays



Are less likely to buy
British goods or services



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Base: 11,523 adults aged 16-64 across Australia, Belgium, Canada, France, Germany, Hungary, India, Italy, Japan, Poland, Russia, South Africa, Spain, Sweden and the United States, July 2016



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Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

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GAME CHANGERS

