



The Budget 2009

Britain in April 2009

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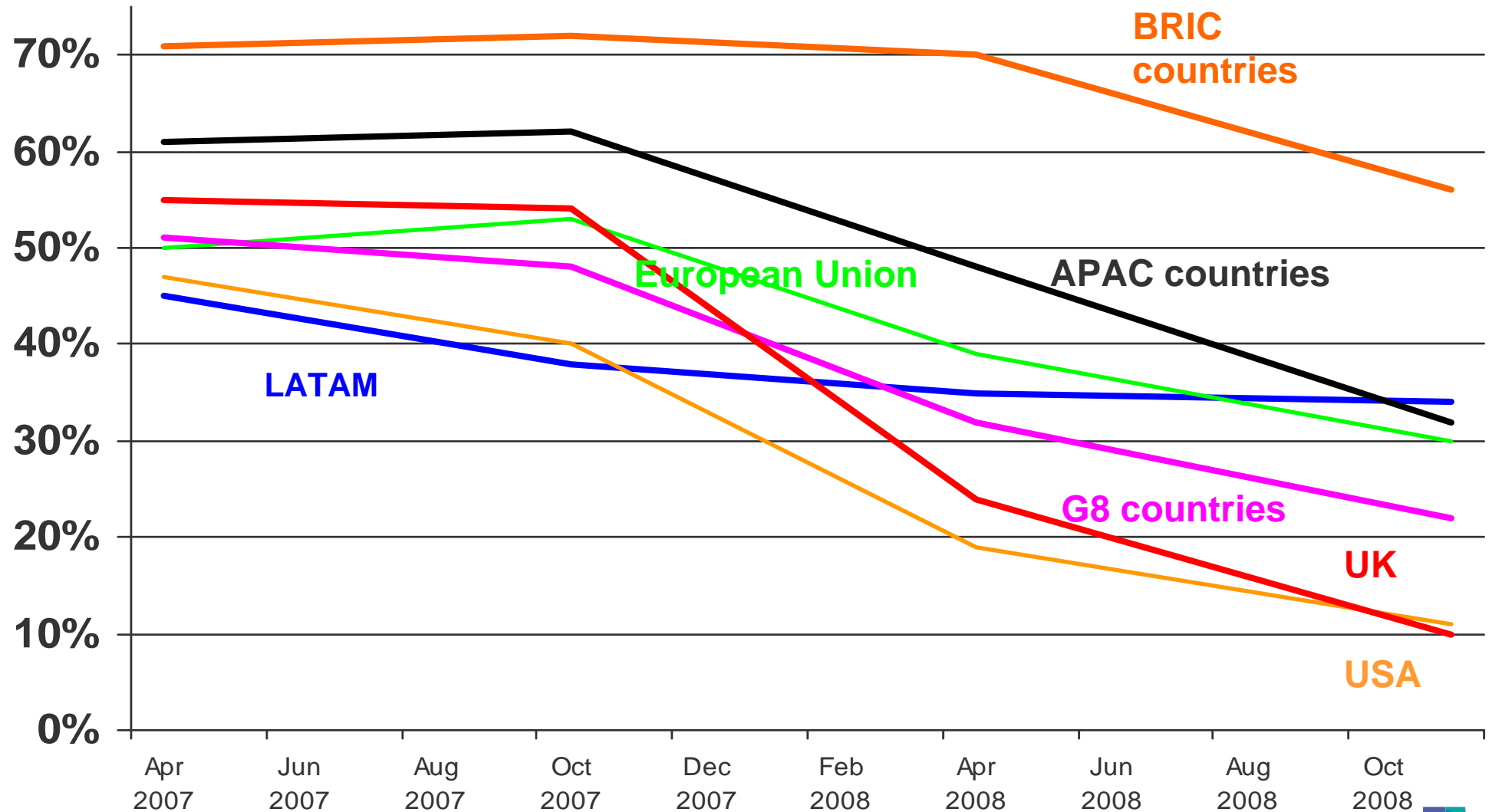
Ipsos MORI



The Economy

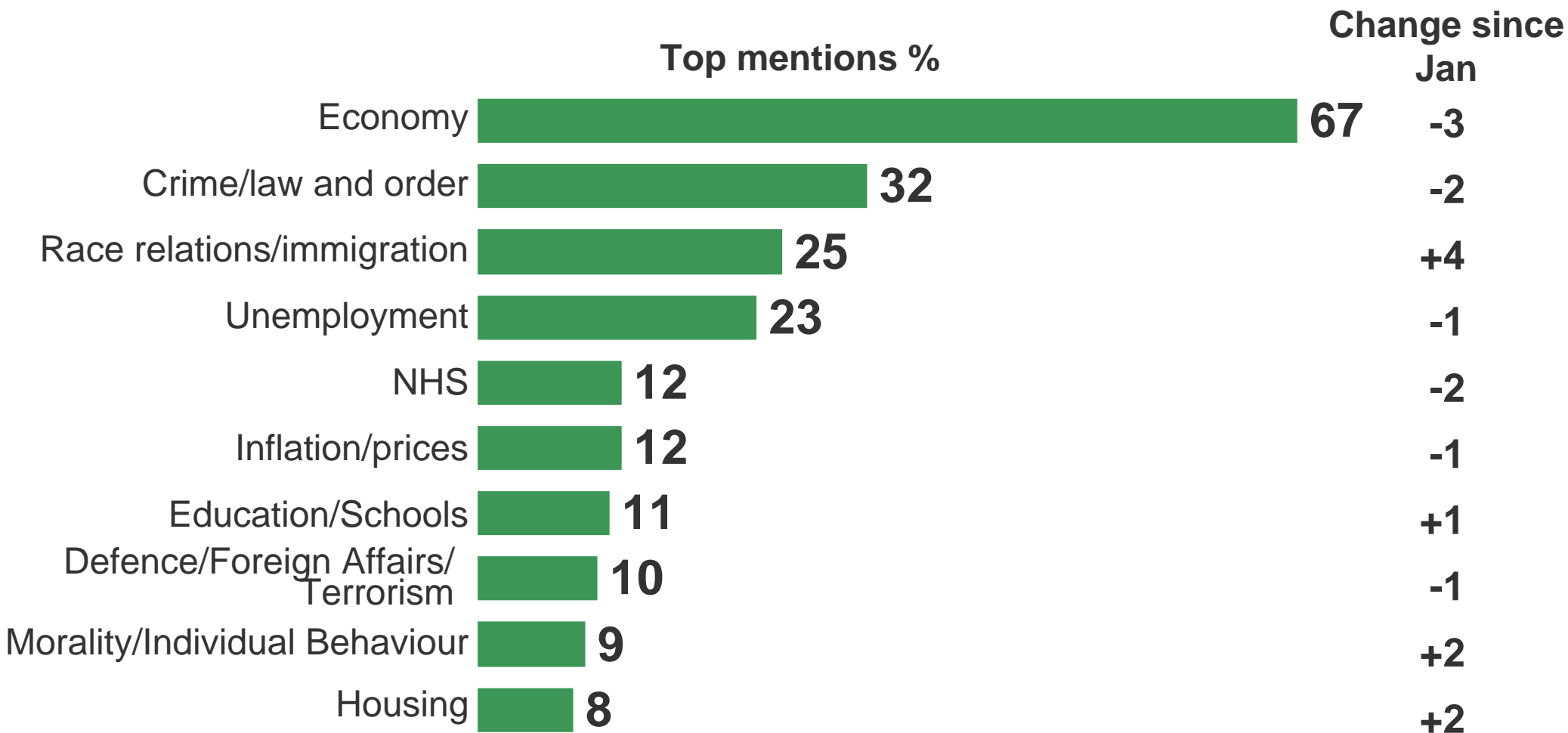
British economic optimism fell faster than elsewhere....

Q Prospects for the economy - % optimistic



Economy is the most important issue

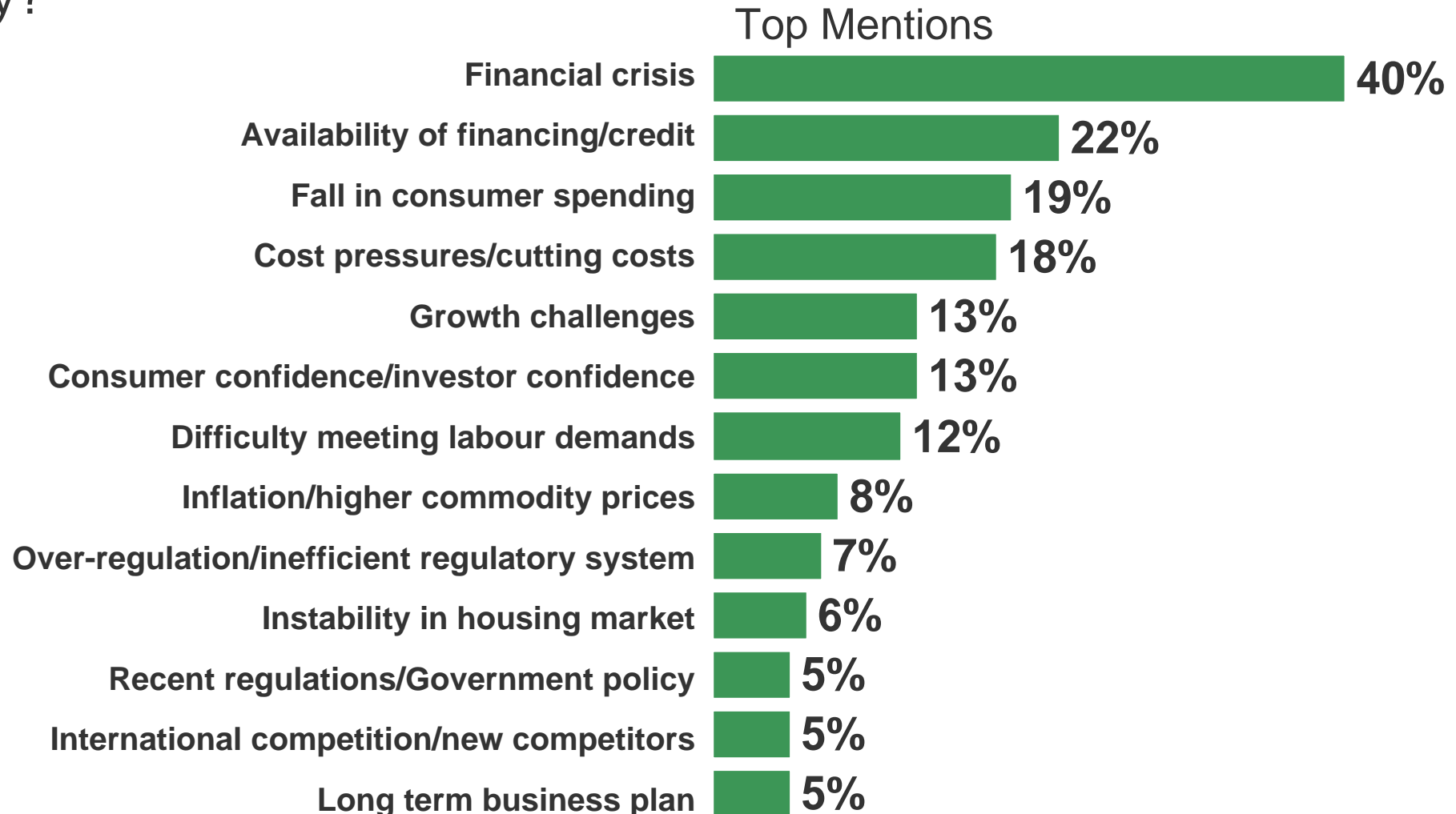
What would you say is the most important issue facing Britain today?
What do you see as other important issues facing Britain today?



Base: 995 British adults 18+, 19th – 24th February 2009

There's only one issue in Britain's boardrooms too....

And what are the most important problems facing your company today?

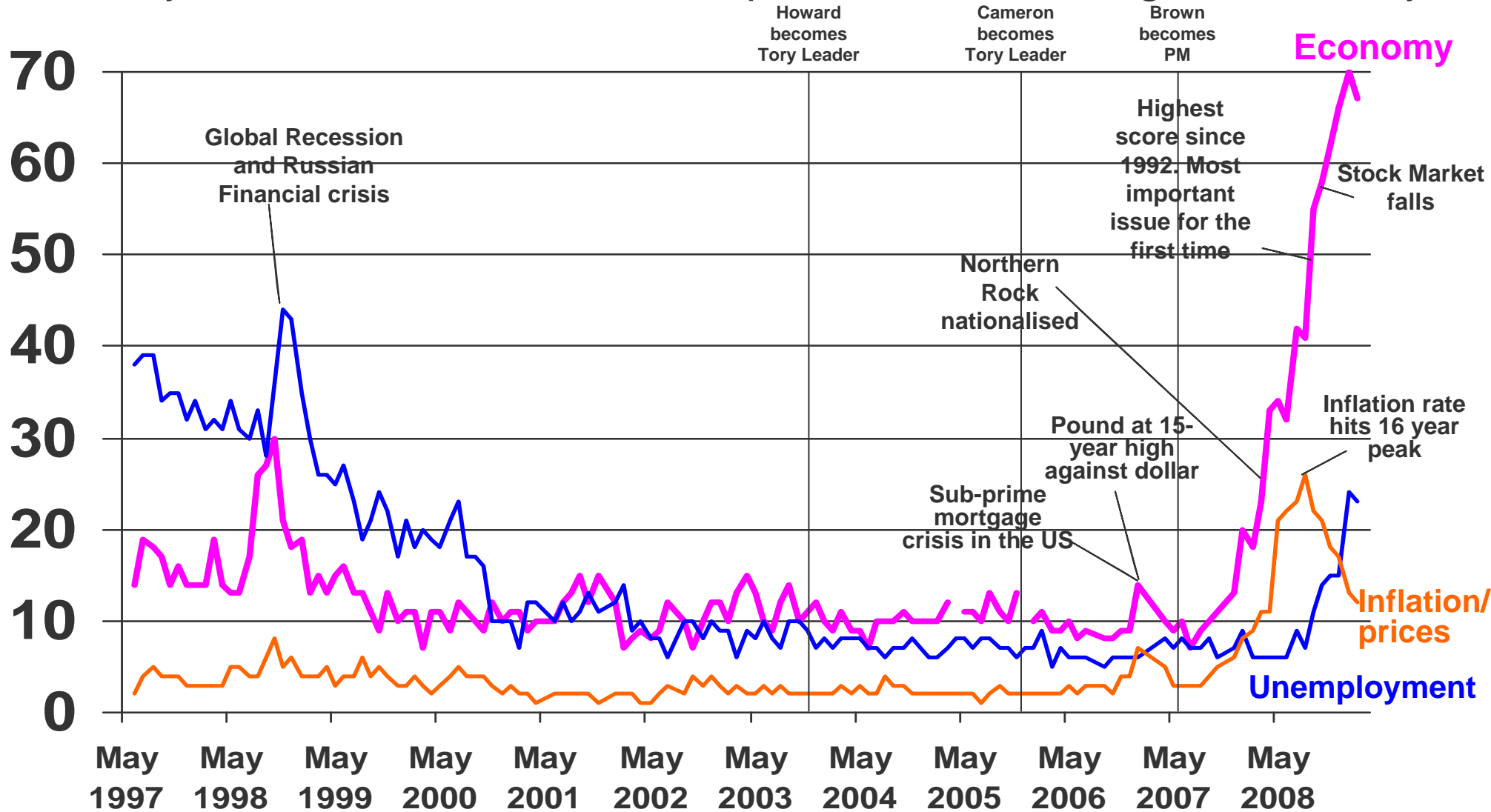


Base: British Captains of Industry (100), interviewed Sep-Dec 2008

Issues Facing Britain:

Economy vs. Unemployment vs. Inflation/Prices

What do you see as the most/other important issues facing Britain today?



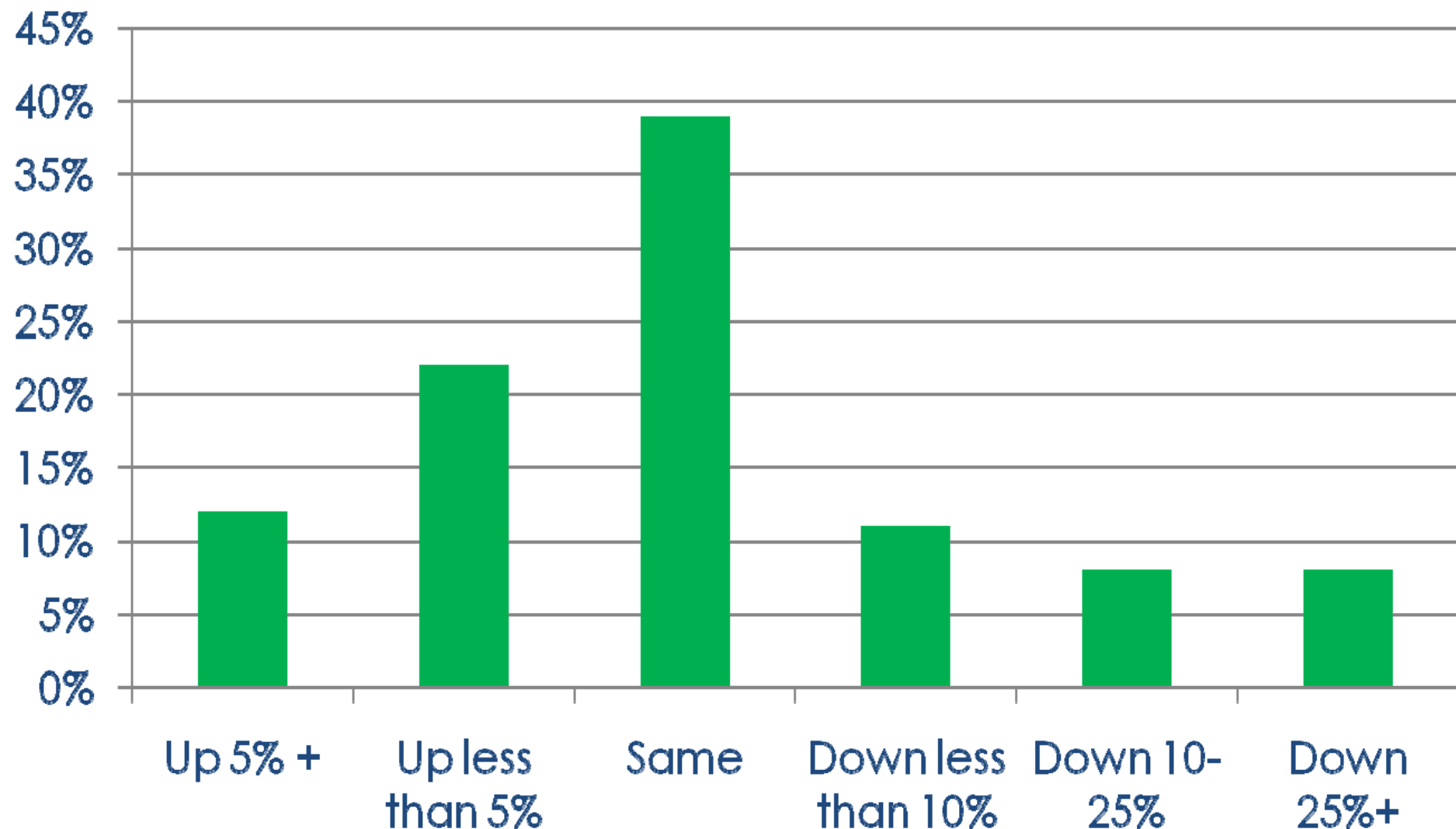
Duration of recessions

- Since 1870, there have been 255 examples of recession:
 - 2 in 3 lasted for one year
 - 1 in 4 lasted for 2 years
 - 1 in 8 lasted for more than 2 years

- The return to their GDP prior to recession took:
 - 1 year for 60% of countries
 - 2 years for 19% of countries
 - Over two years for the remaining 21%

Source: Trajectory

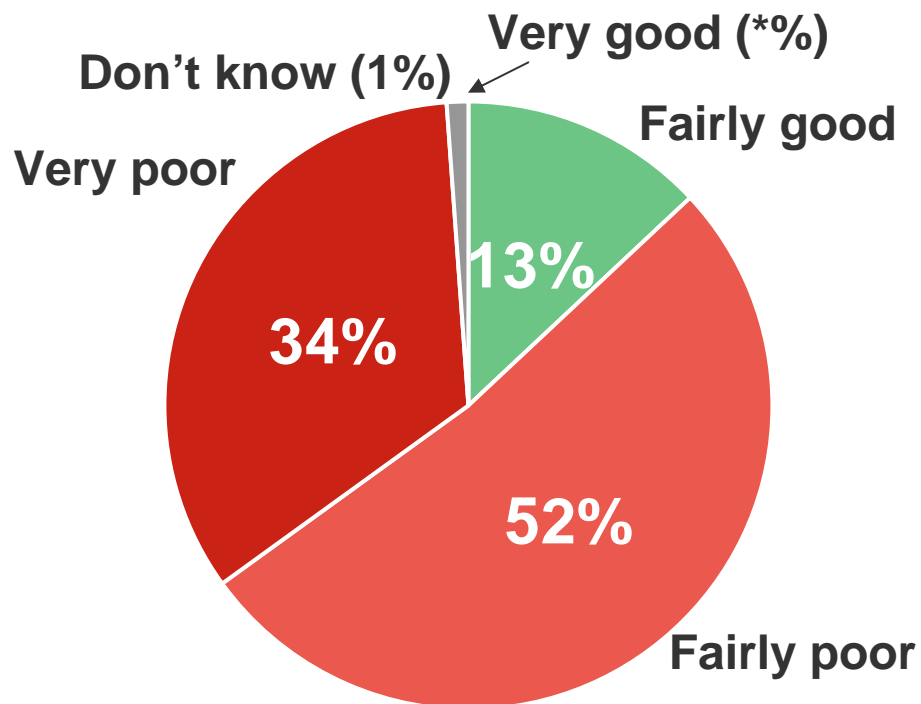
Consumer incomes compared to last year



Awaiting recovery....

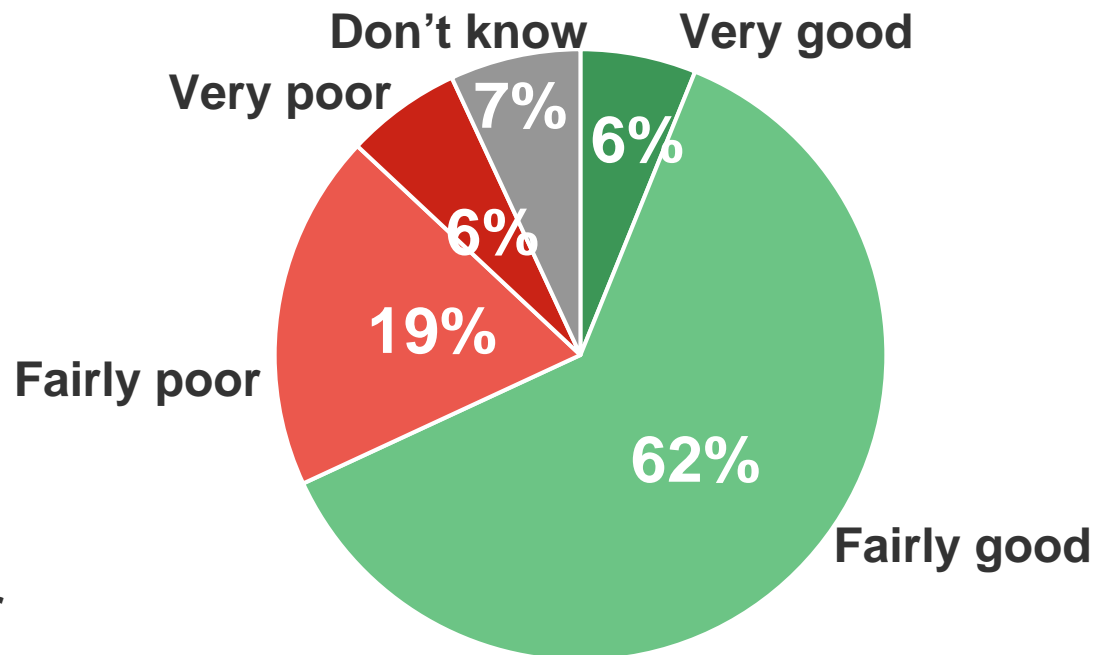
*How would you describe the current state of the British economy?
And what state do you think the British economy will be in, in 5 years' time?*

Current state of British economy



Total poor = 85%

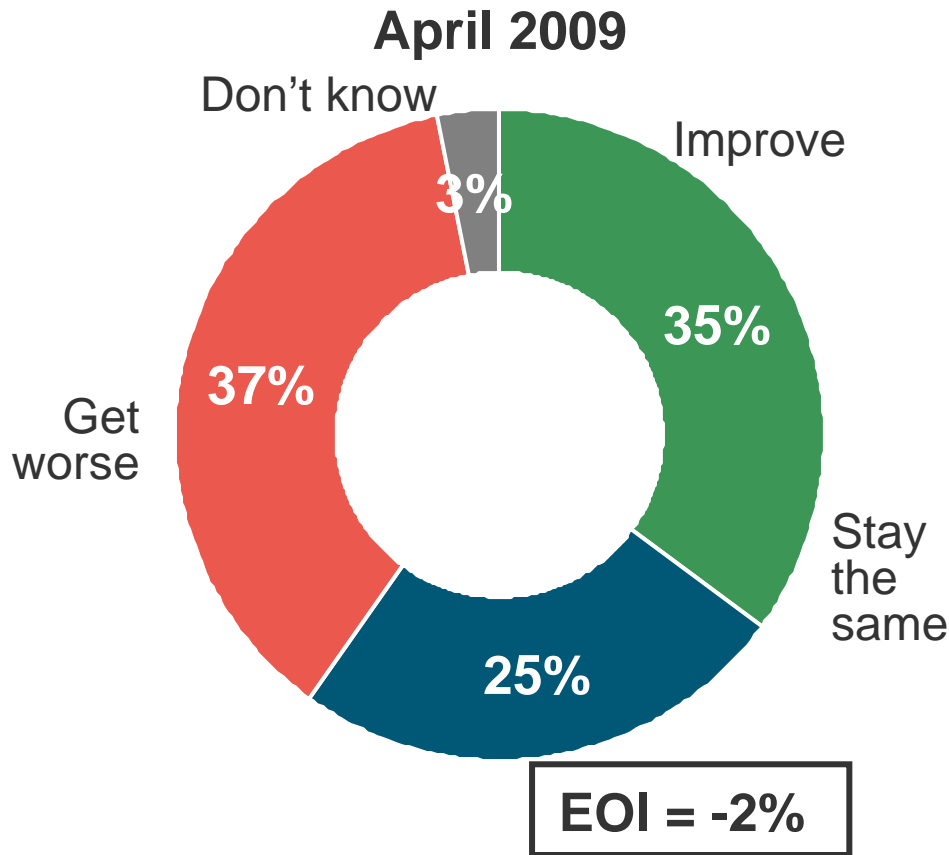
State of British economy in 5 years' time



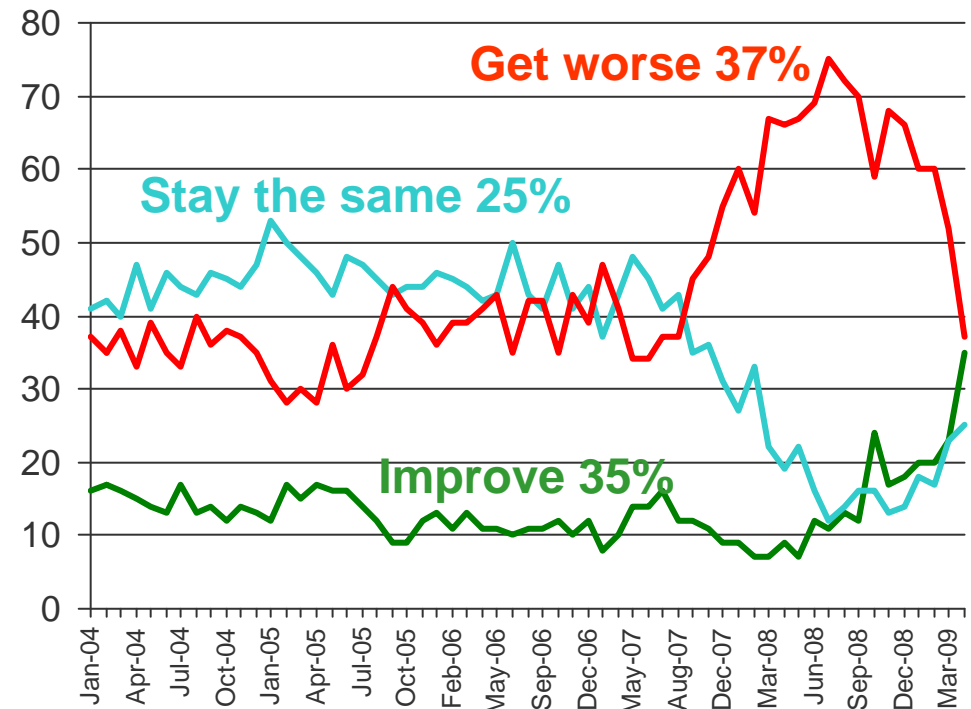
Total good = 68%

What about the year ahead??

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



January 2004 – April 2009

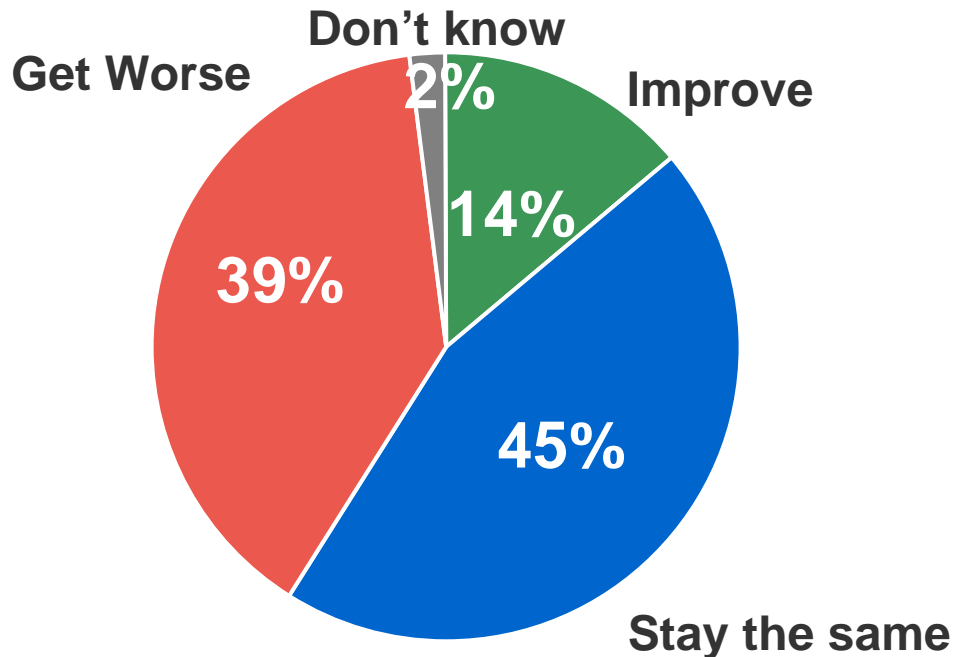


Base: 1,011 British adults, 17th-19th April 2009

Optimism about personal circumstances has also improved

Do you think that your personal financial circumstances will improve, get worse or stay the same over the next few months?

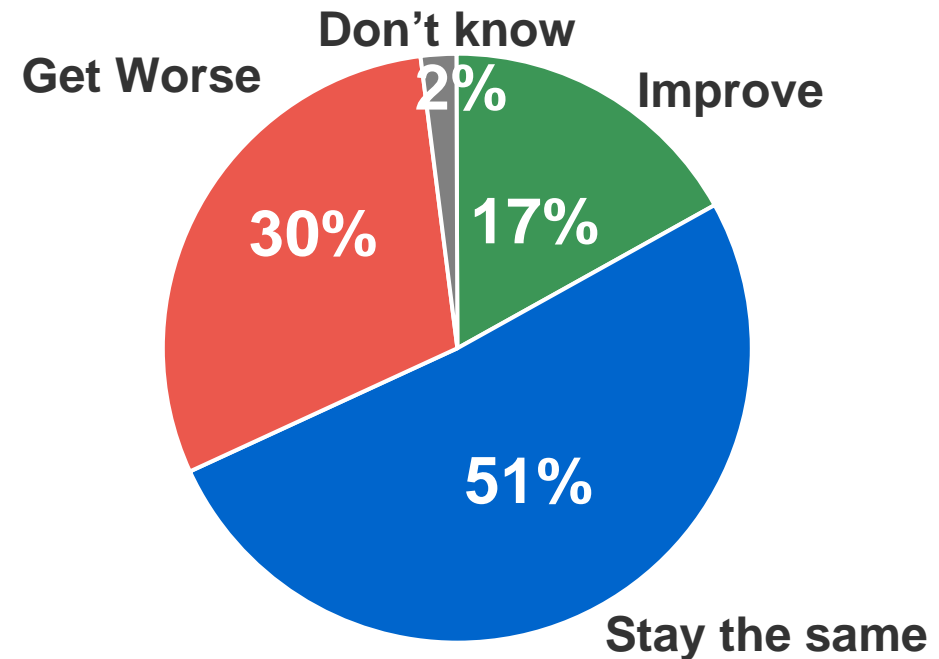
November 2008



Net improve = -25

Base: 1,002 British adults, 17th-19th November 2008

April 2009

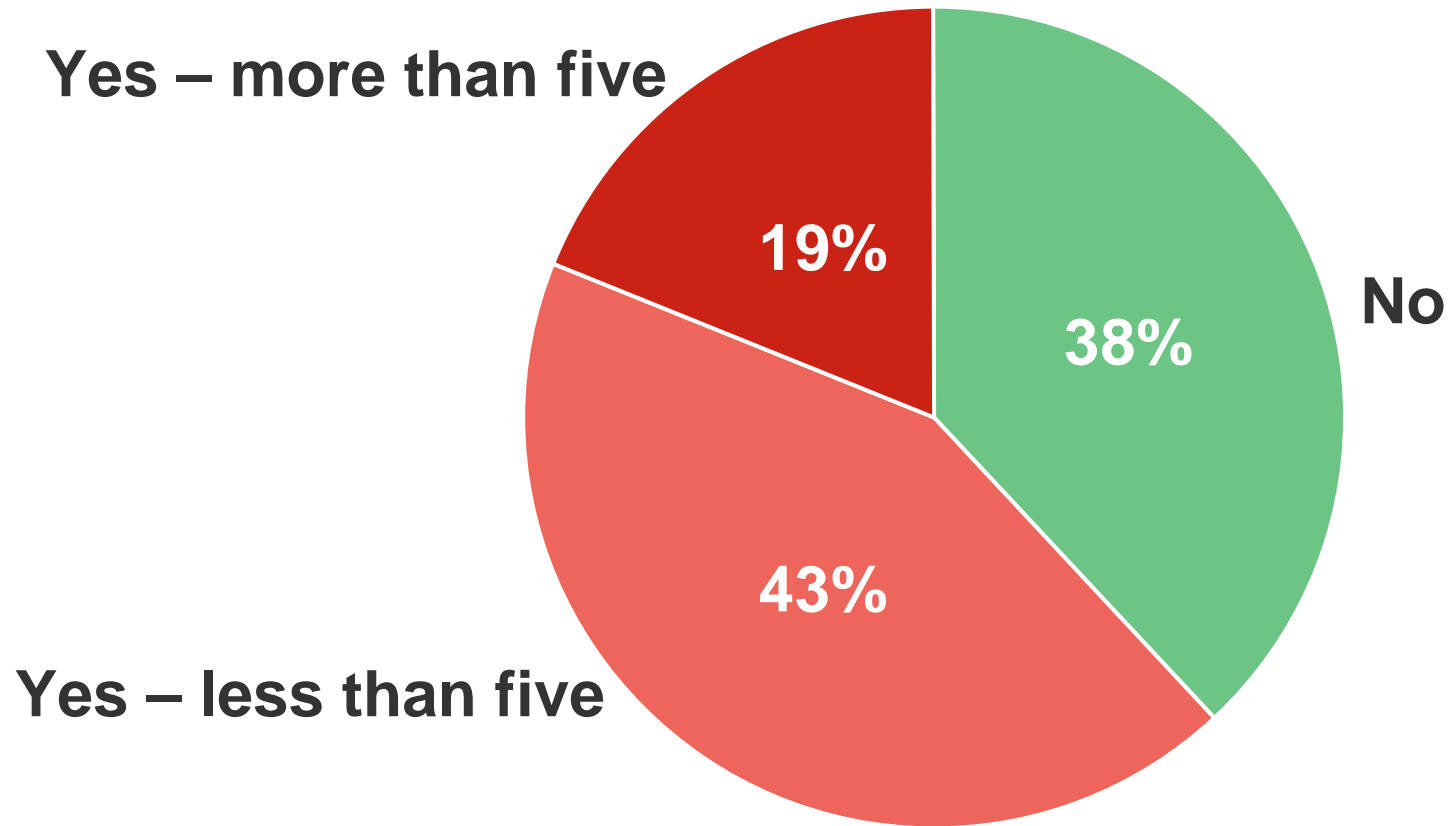


Net improve = -13

Base: 1,011 British adults, 17th-19th April 2009

Most know someone made redundant

And do you personally know anyone who has been made redundant in the past six months?

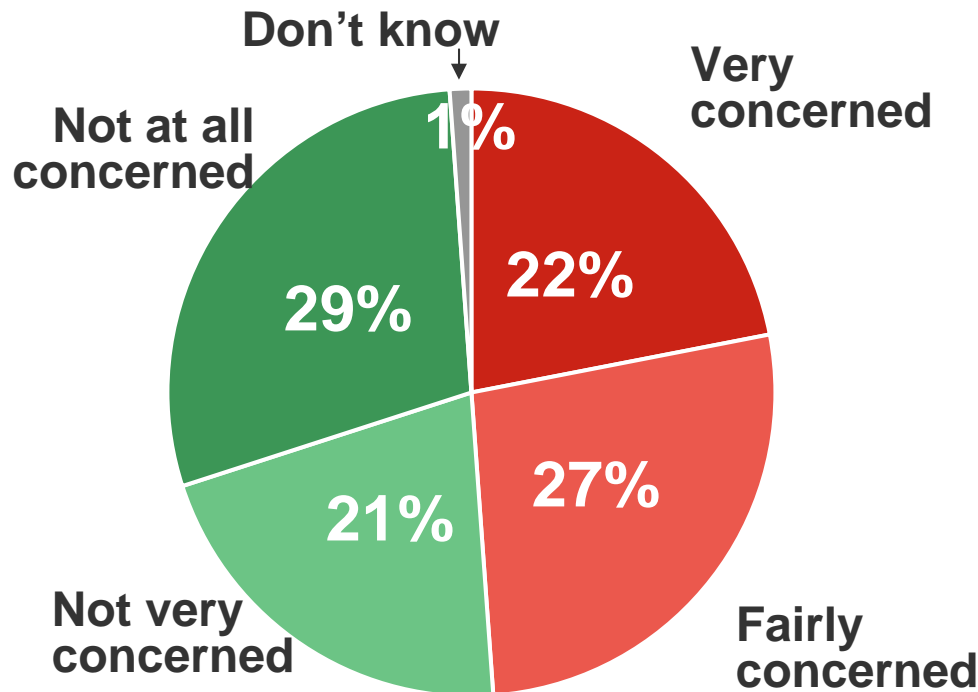


Base: 1,011 British adults, 17th-19th April 2009

Fear of redundancy is falling slightly

How concerned if at all would you say you are about the possibility of being made redundant or becoming unemployed over the next few months?

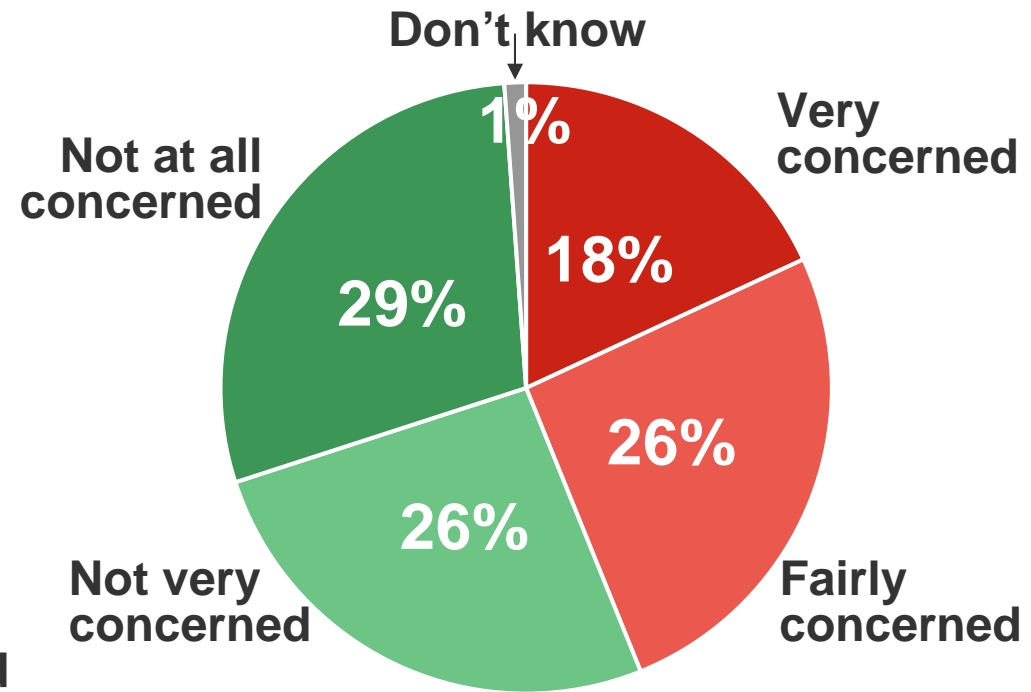
January 2009



Total concerned = 49%

Base: 461 British adults in full-time work, 16th-18th January 2009

April 2009

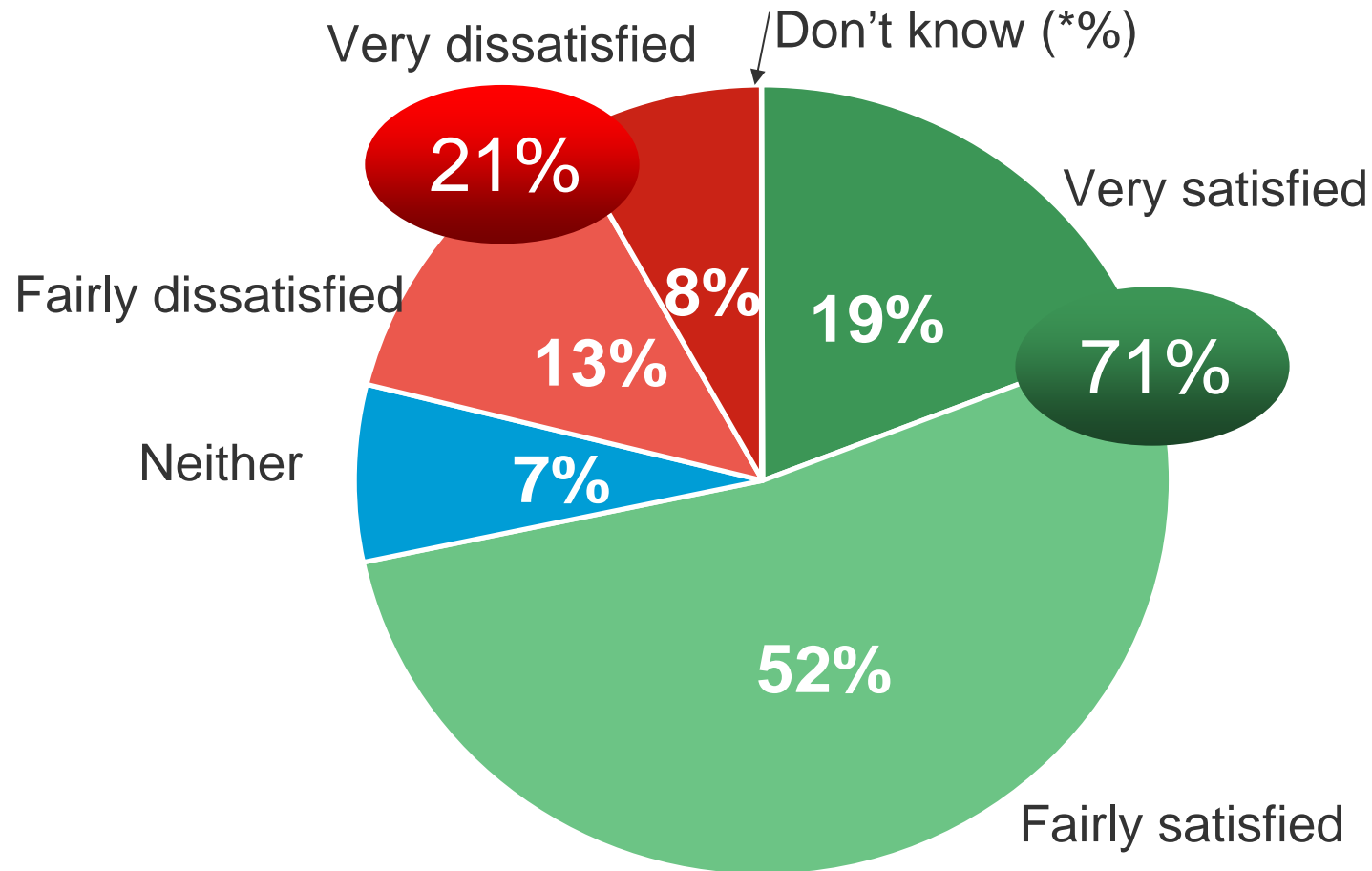


Total concerned = 44%

Base: 436 British adults in full-time work, 17th-19th April 2009
Source: Ipsos MORI Political Monitor

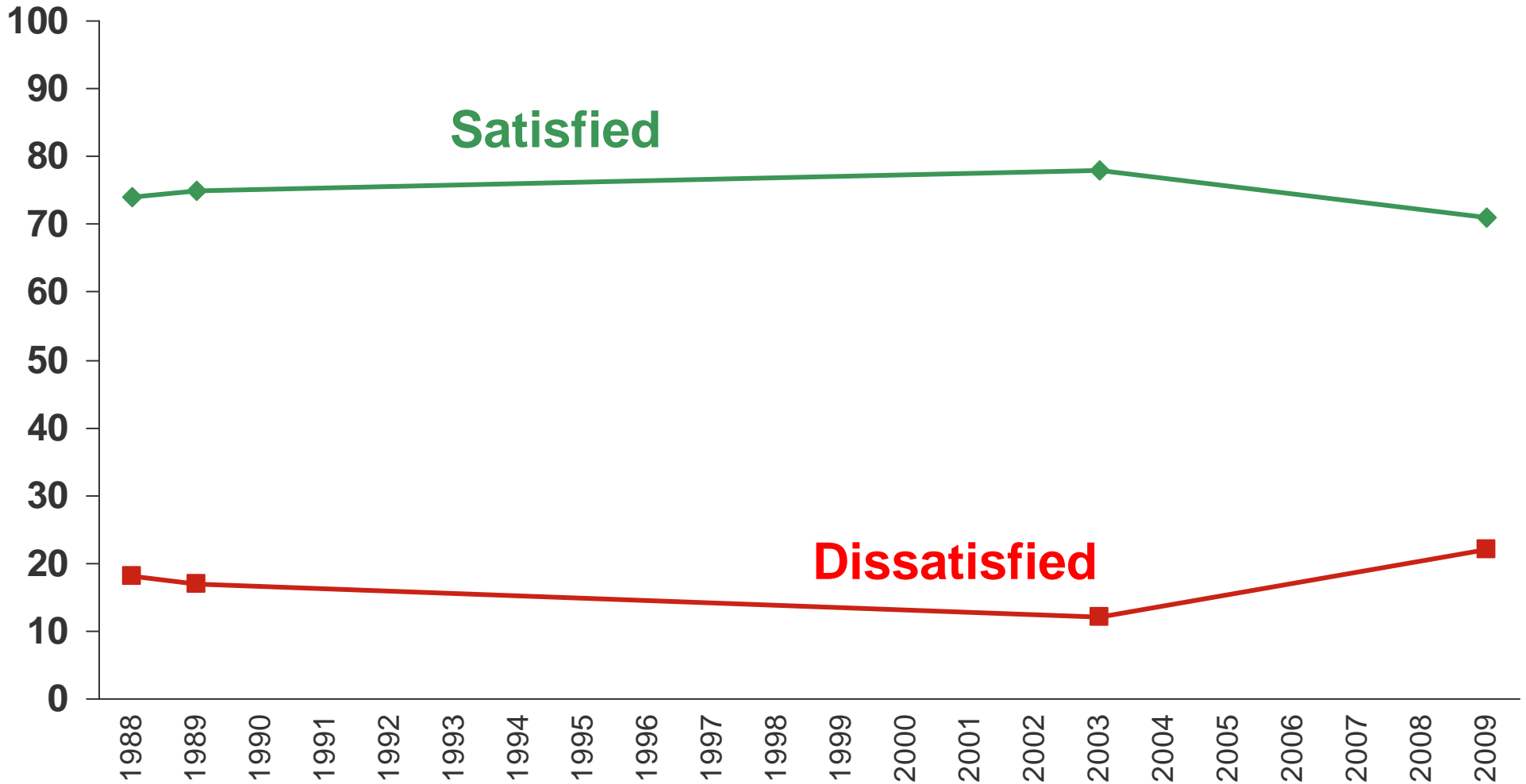
Satisfaction with standard of living

The things people can buy and do – their housing, furniture, food, cars, recreation and travel – make up their standard of living. How satisfied or dissatisfied do you feel about your standard of living at present?



Base: 1,011 British adults 18+, 17th-19th April 2009

Satisfaction with standard of living – trends

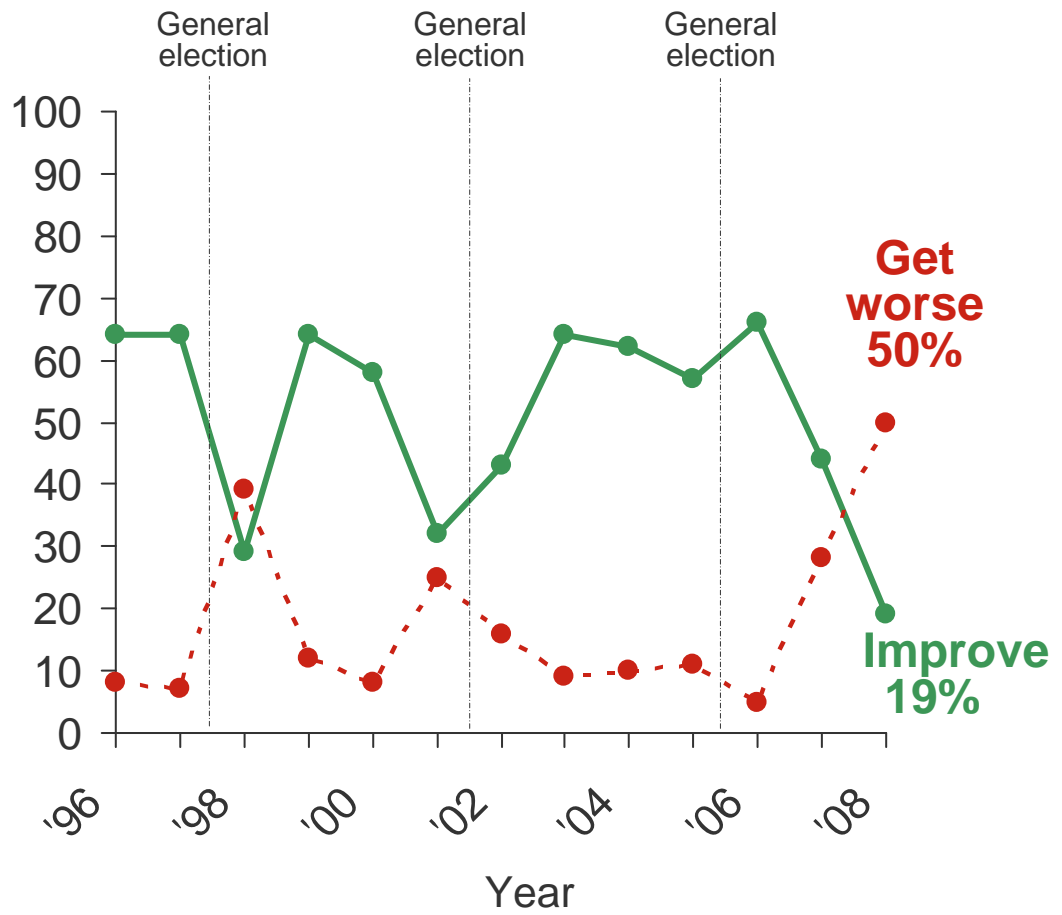
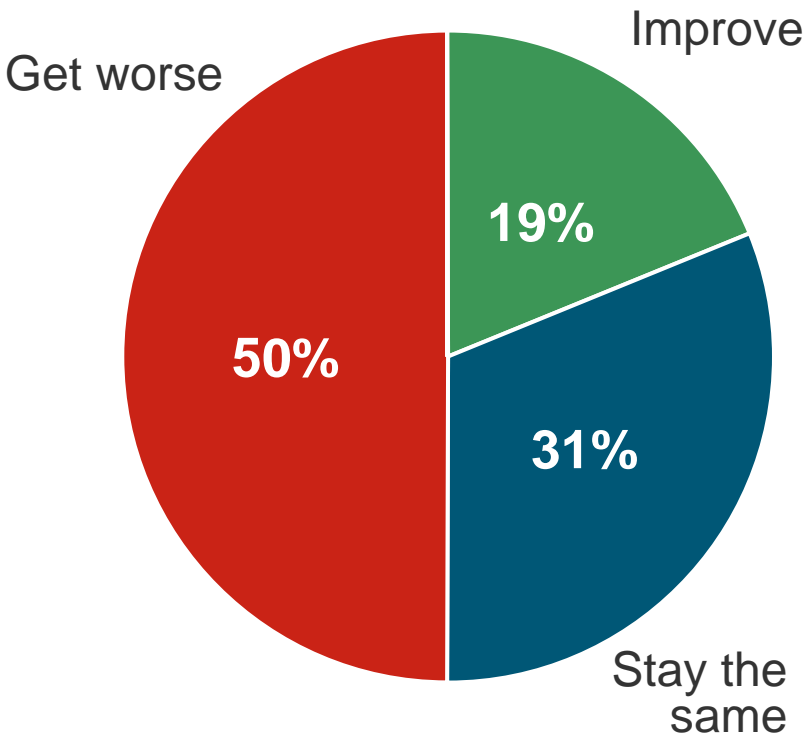


Base: c. 1,000 British adults each month

Source: Ipsos MORI Political Monitor

But business expects things to get worse...

Do you think that business for your own company will improve, stay the same or get worse over the next 12 months?

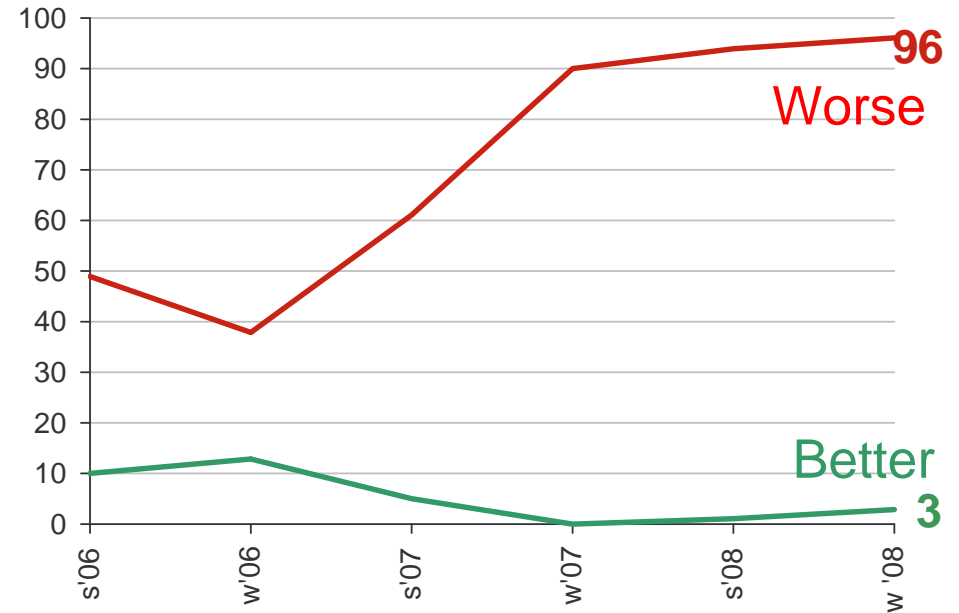
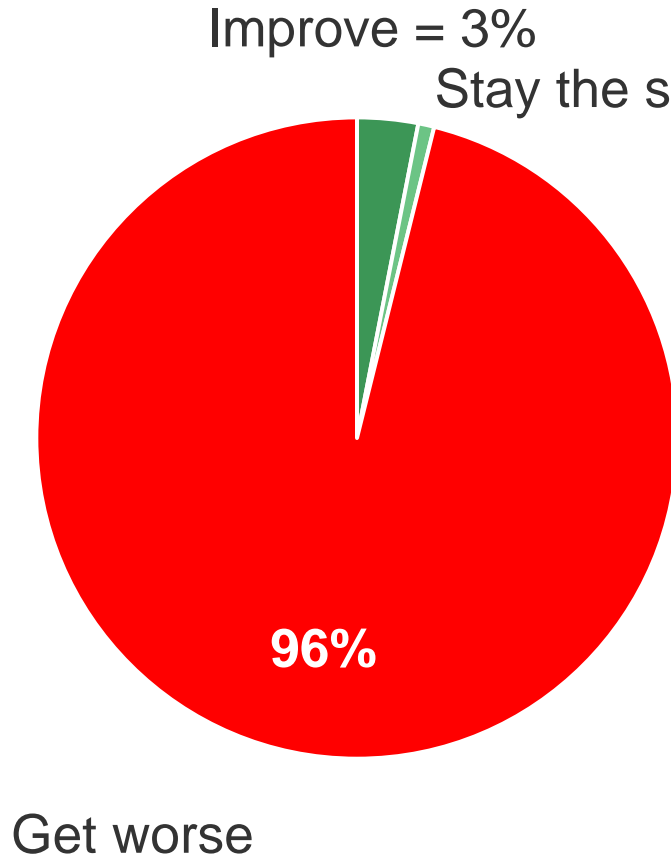


Base: British Captains of Industry (100), interviewed Sep-Dec 2008

Journalists are
most pessimistic
of all

You are a cheery bunch...

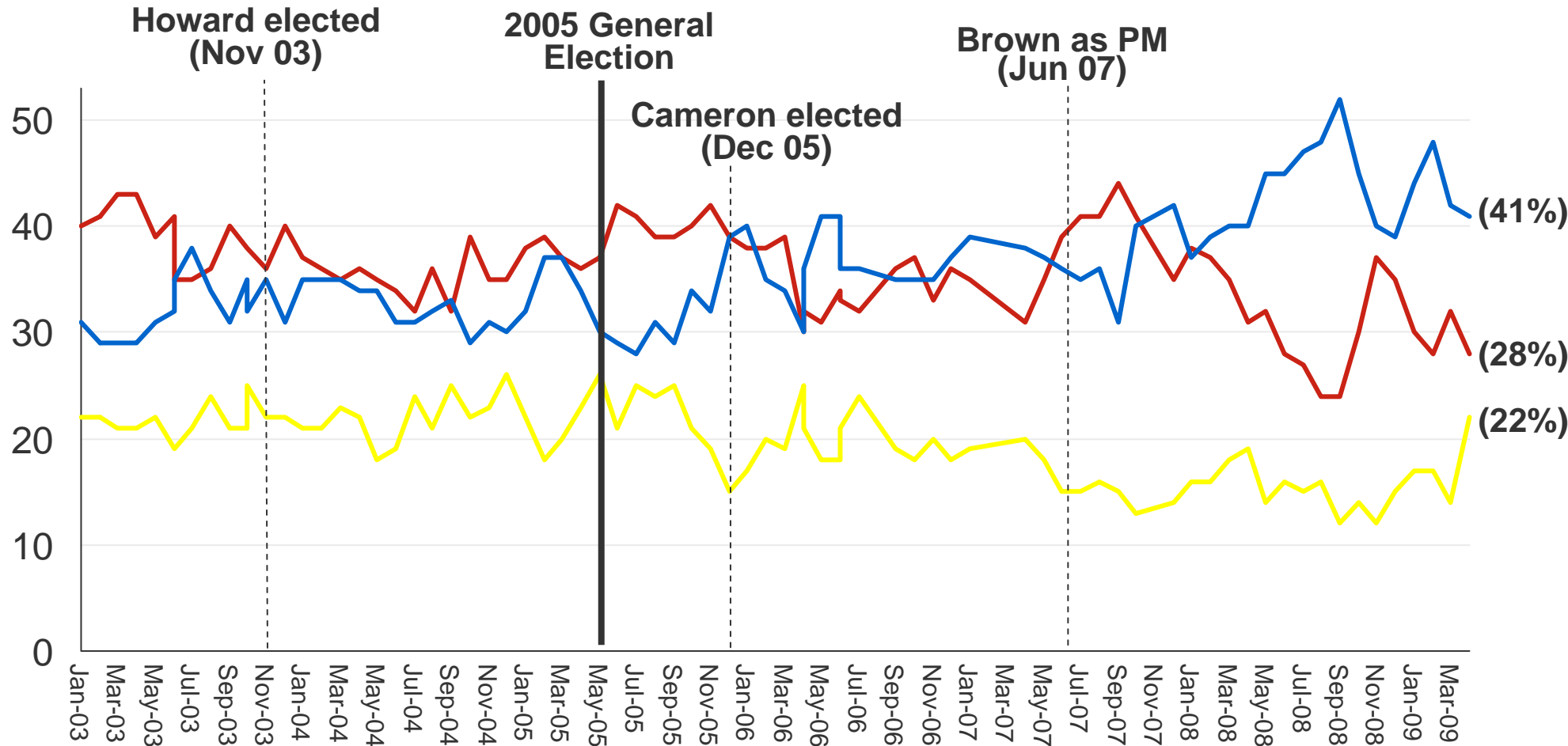
Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



The state of politics

Labour suffering more after "Smeargate"

How would you vote if there were a General Election tomorrow?



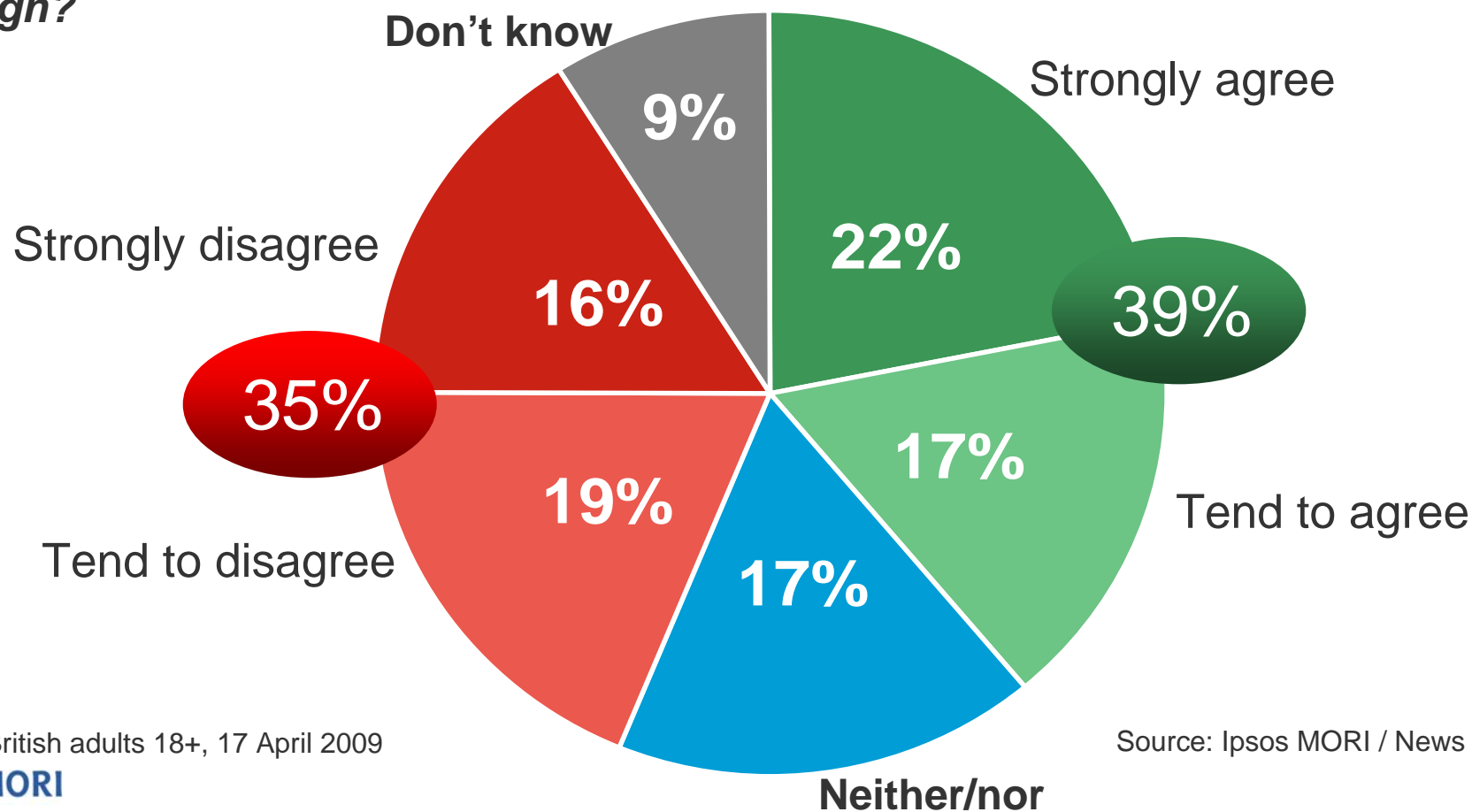
Base: c. 1,000 British adults each month through June 2008; c. 500 British adults thereafter

Source: Ipsos MORI Political Monitor

39% agree Brown's leadership style is to blame for the smear incident; 35% disagree

You've probably heard about the recent controversy about a senior Downing Street advisor planning an internet smear campaign against Conservative politicians.

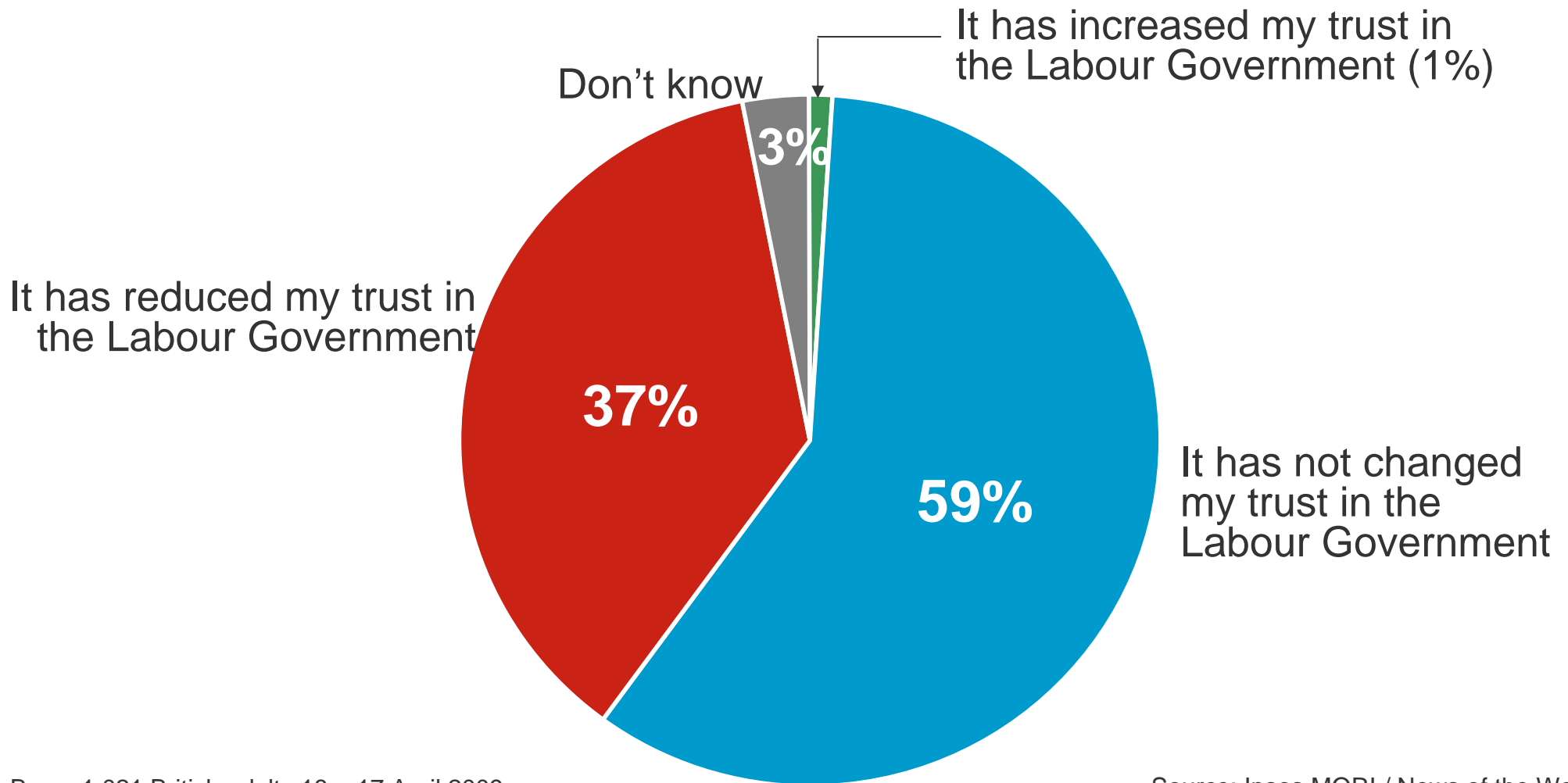
Some people have said that Gordon Brown's leadership style, meaning the way he runs the Government, is to blame for this incident. To what extent do you agree or disagree that Brown's leadership style is to blame for the actions of those planning the smear campaign?



Base: 1,021 British adults 18+, 17 April 2009

More than a third (37%) feel the controversy has 'reduced' their trust in the Labour Govt

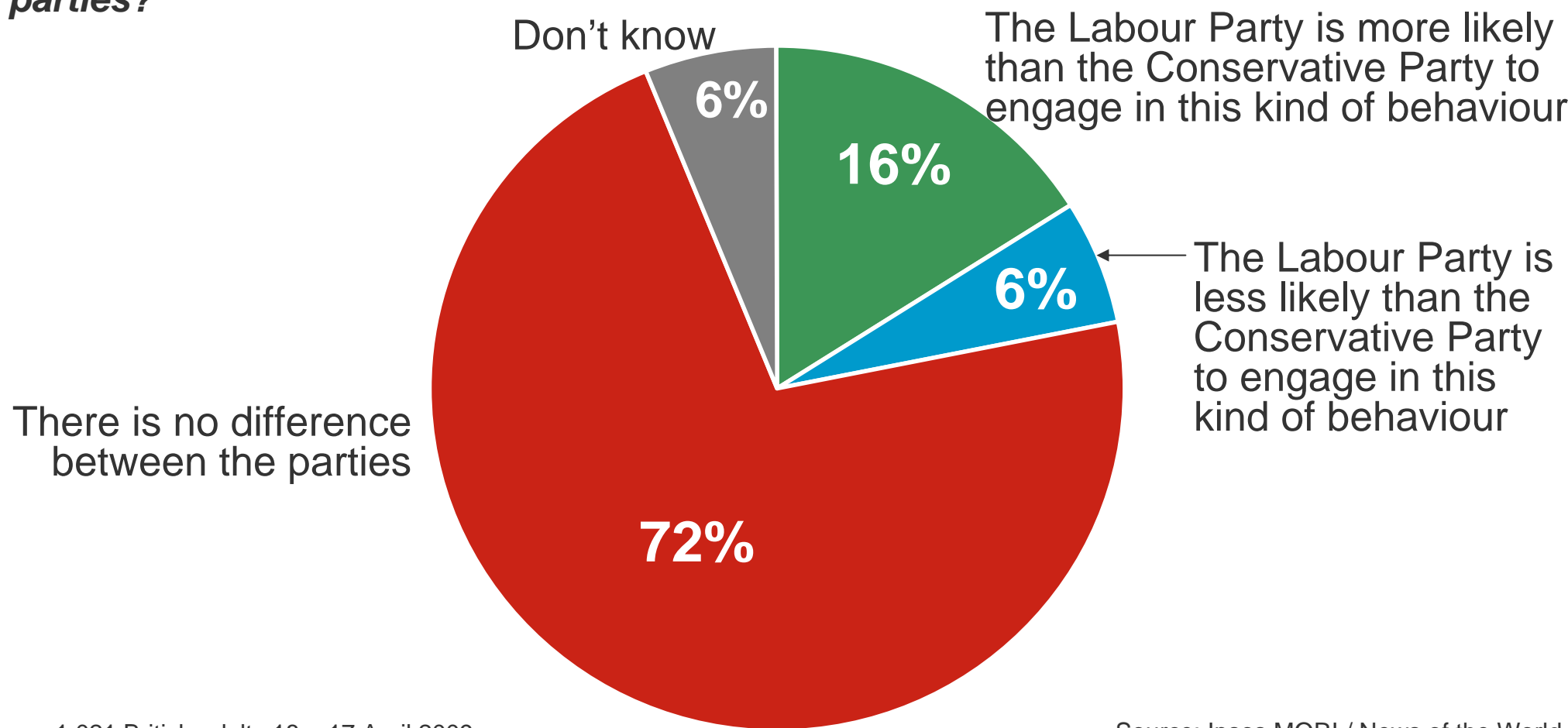
And has this recent controversy affected your trust in the Labour Government? (READ OUT)



Base: 1,021 British adults 18+, 17 April 2009

But for most its just normal Westminster folk going about their daily business!

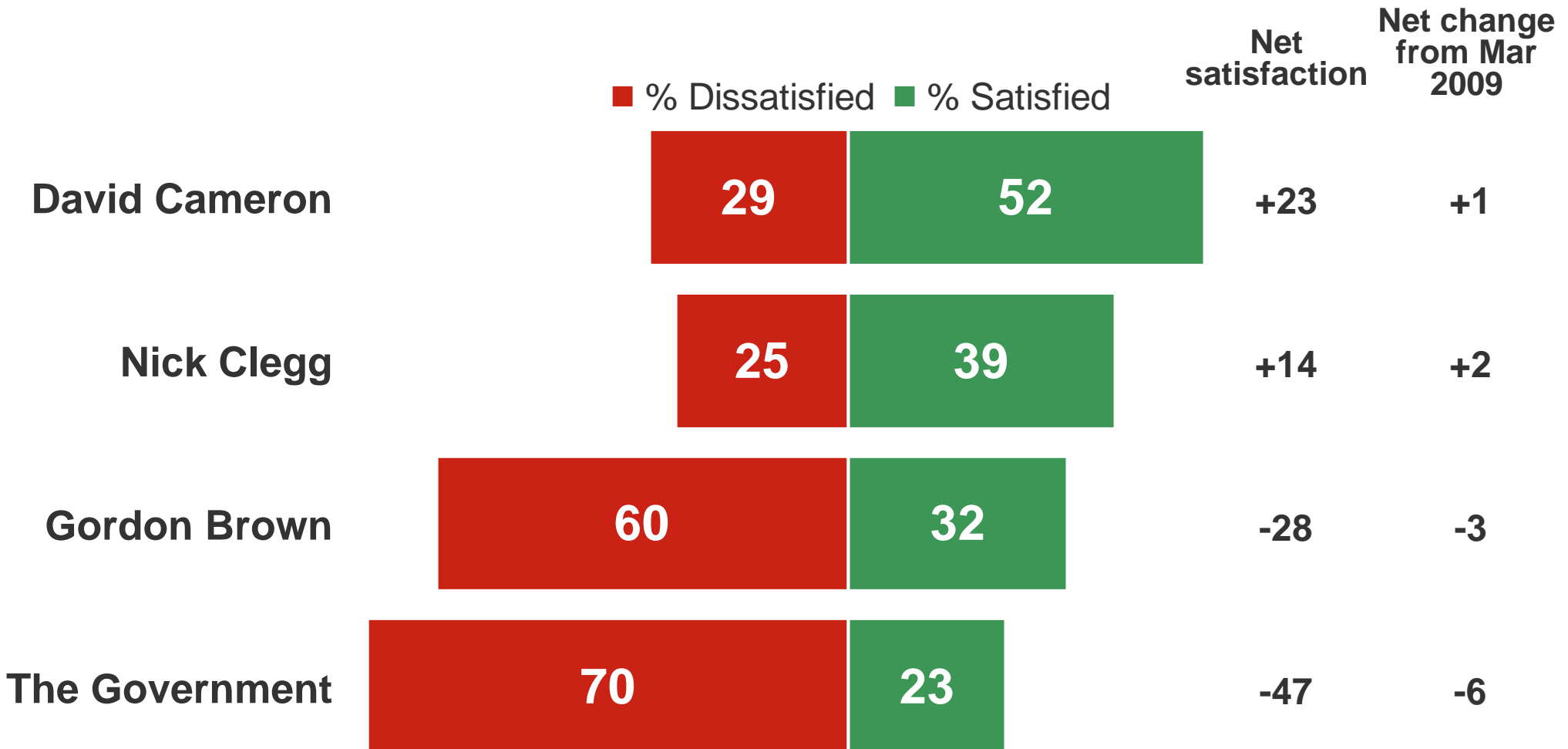
In your view, is the Labour Party more likely than the Conservative Party to engage in this type of behaviour, for example personal smear campaigns, or are Labour less likely to engage in this type of behaviour, or is there no difference between the parties?



Base: 1,021 British adults 18+, 17 April 2009

Cameron on the up

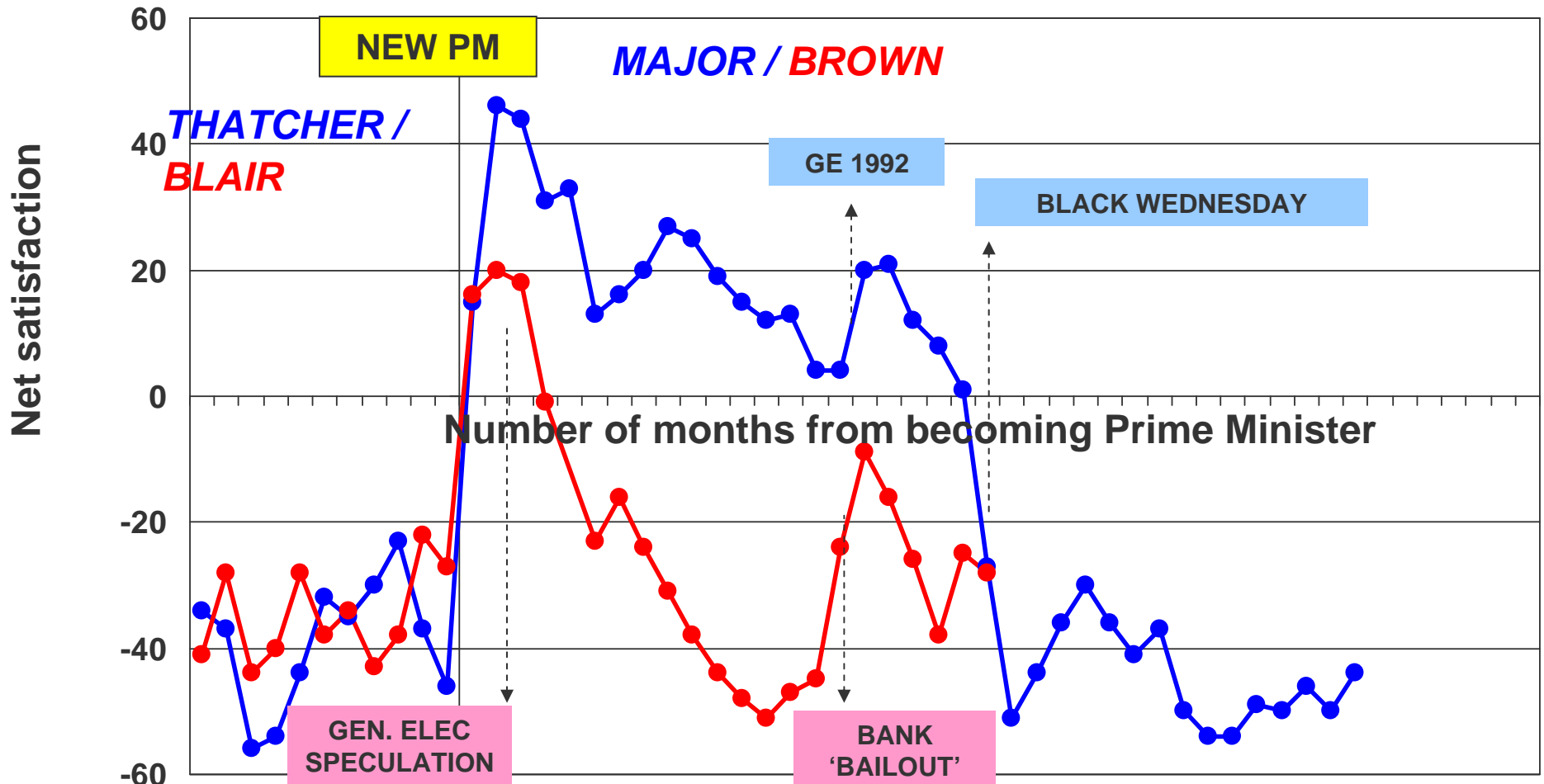
How satisfied or dissatisfied are you with the way ... is running the country / doing his job as ... ?



Base: 1,011 British adults 18+, 17th-19th April 2009

Brown is down....

How satisfied or dissatisfied are you with the way ... is doing his / her job as Prime Minister?

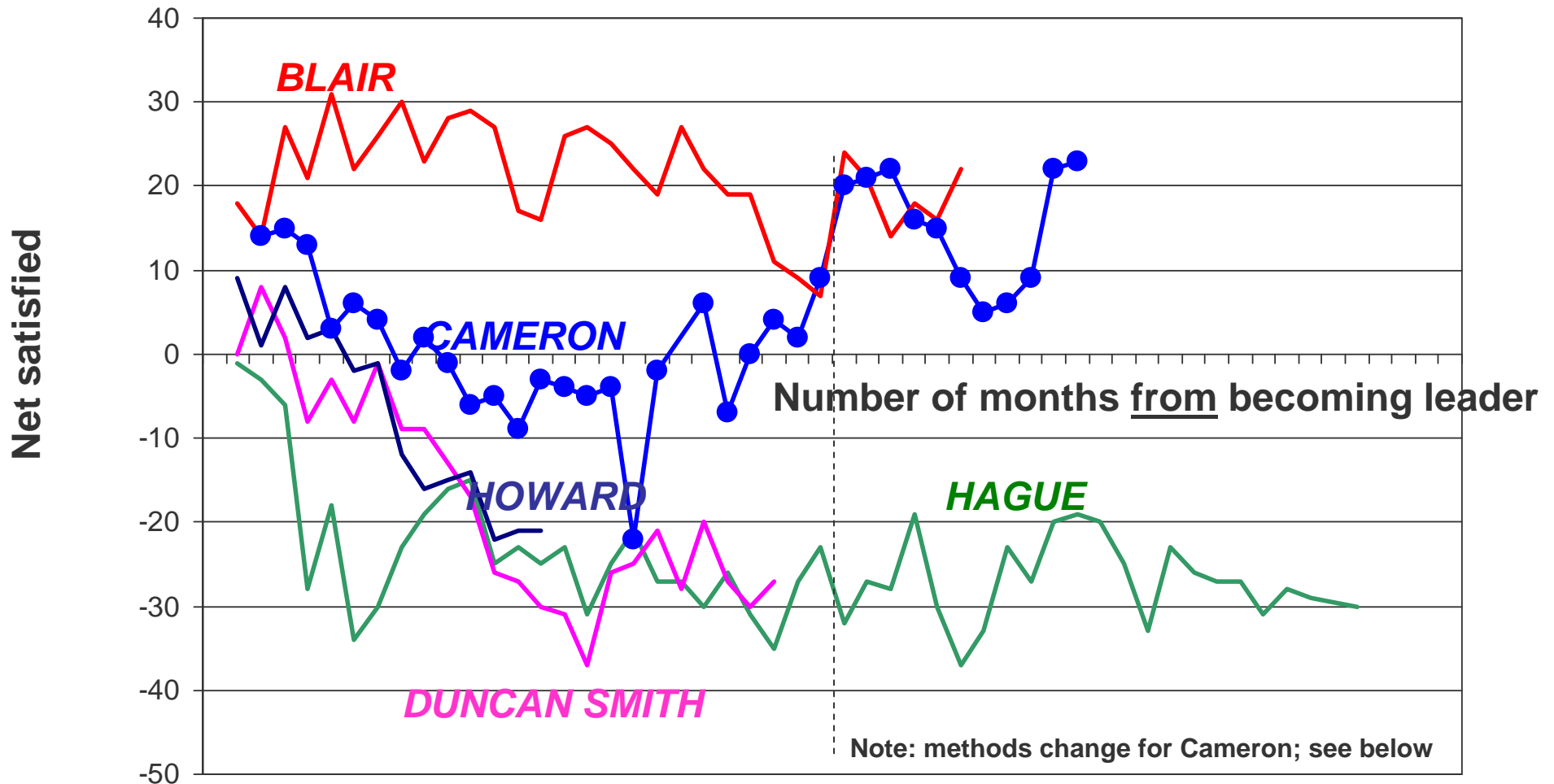


Base: c. 1,000 Brits

Source: Ipsos MORI Political Monitor

Cameron breaks the mould

How satisfied or dissatisfied are you with the way ... is doing his job as leader of the ... Party?



Base: c.1,000 British adults interviewed 3rd week of the month

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Note: Data collected prior to May 2008 was collected via face-to-face methodology; data collected from June 2008 was via telephone

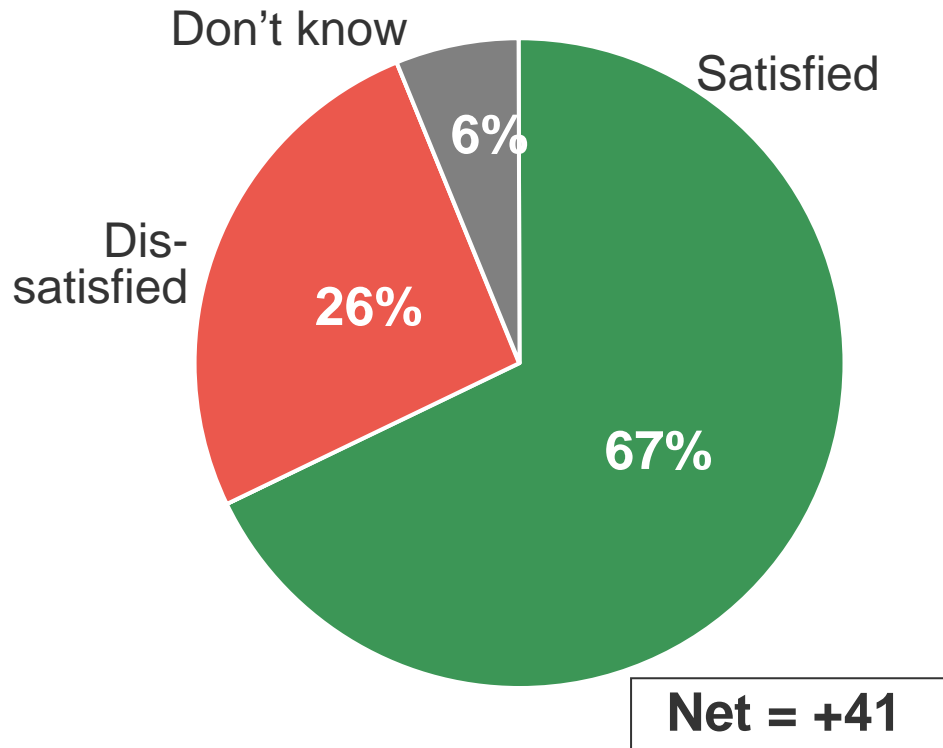
Source: Ipsos MORI Political Monitor



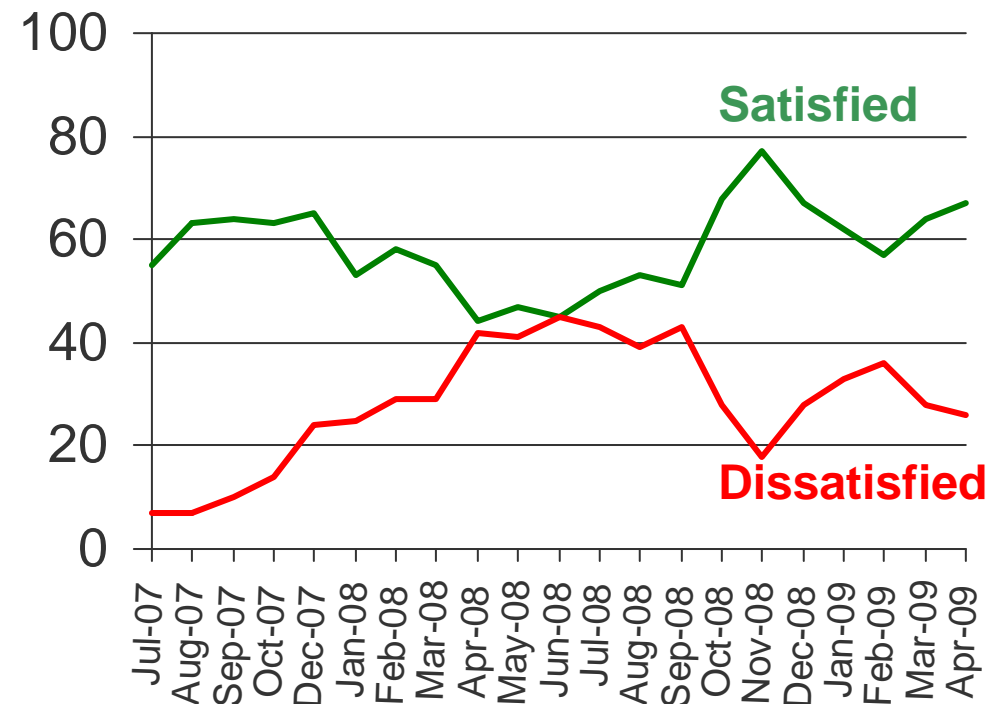
Gordon Brown remains popular among Labour voters

Are you satisfied or dissatisfied with the way Gordon Brown is doing his job as Prime Minister?

April 2009



July 2007 – April 2009



Base: 259 Labour supporters 18+, 17th-19th April 2009

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Note: Data collected prior to May 2008 was collected via face-to-face methodology; data collected from June 2008 was via telephone

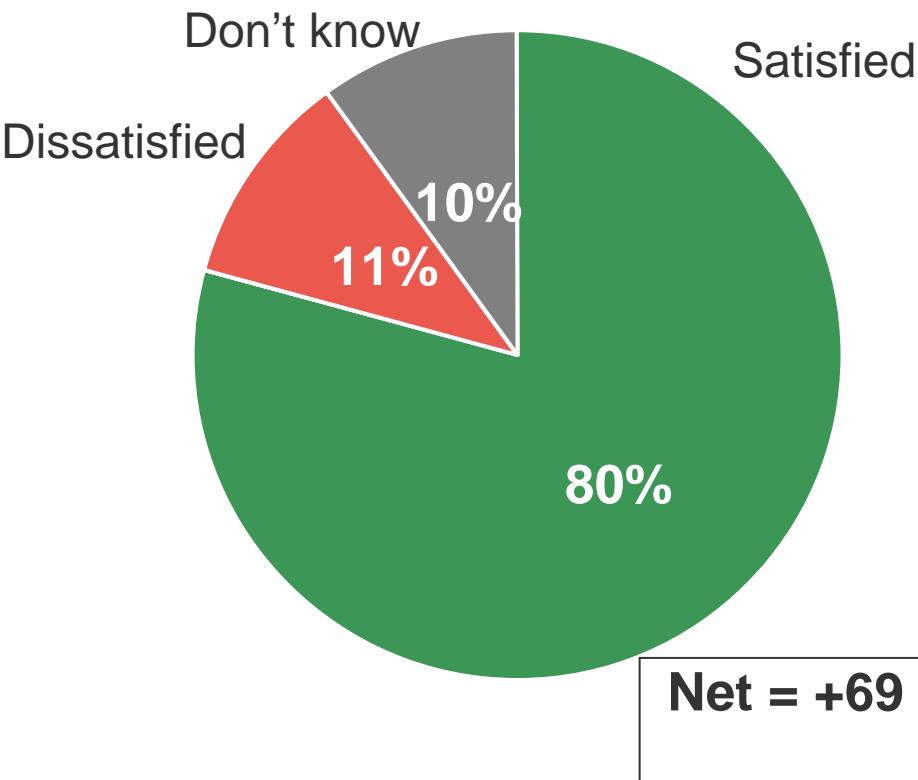
Source: Ipsos MORI Political Monitor



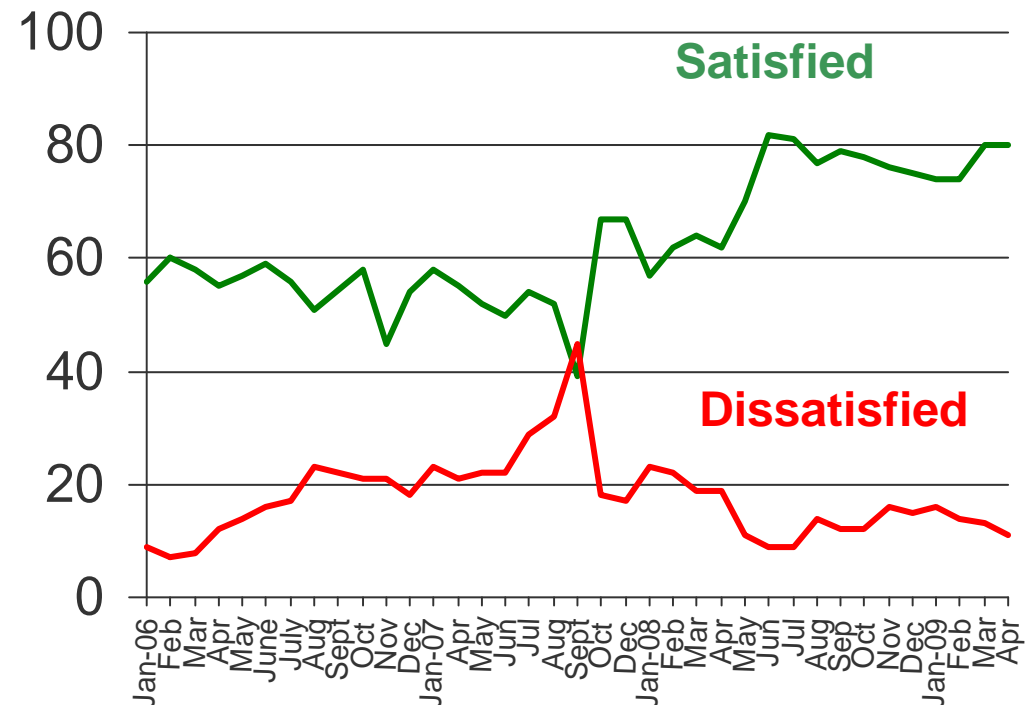
But nowhere near as popular as David Cameron among the Tories

Are you satisfied or dissatisfied with the way David Cameron is doing his job as leader of the Conservative Party?

April 2009



January 2006 – April 2009



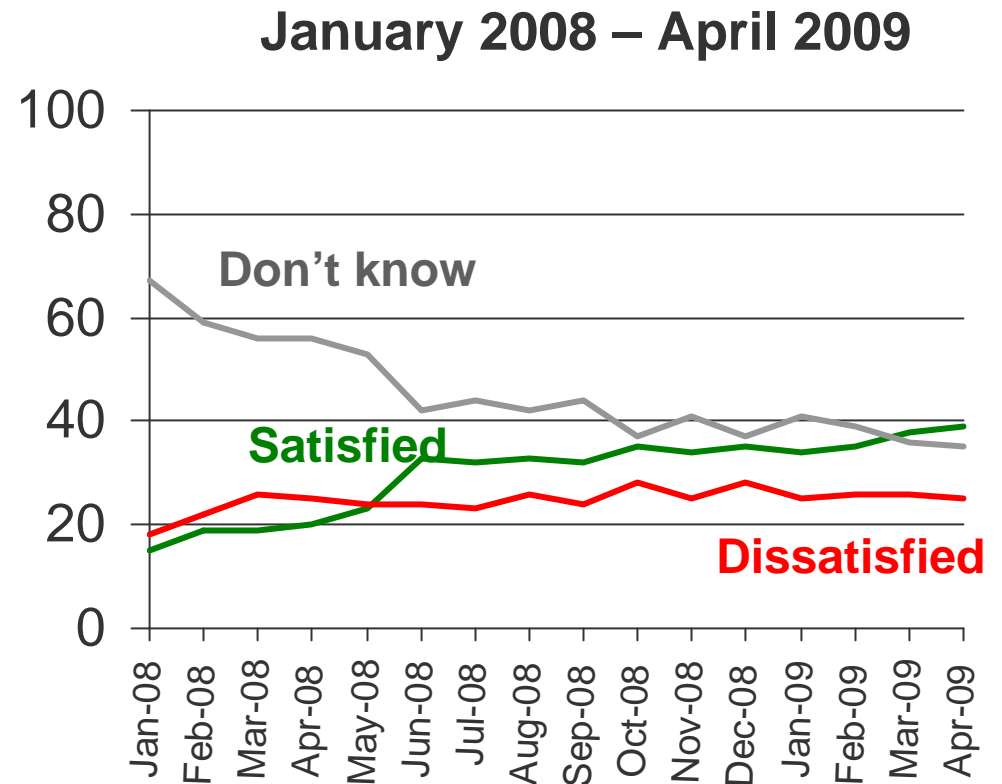
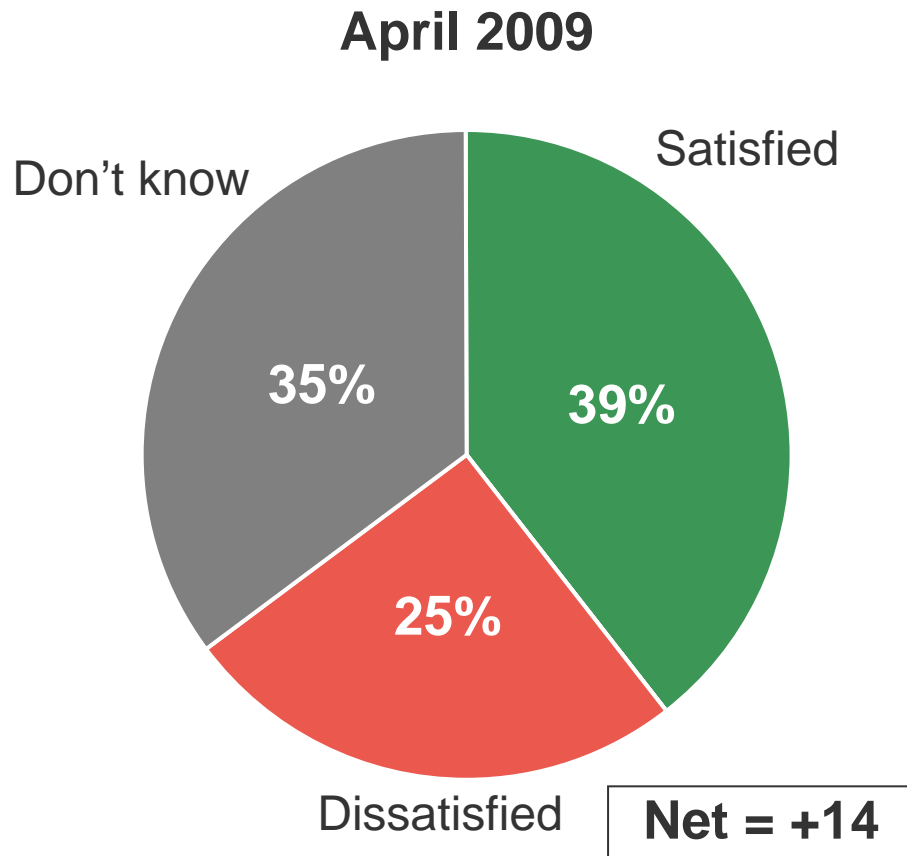
Base: 294 Conservative supporters 18+, 17th-19th April 2009

Note: Data collected prior to May 2008 was collected via face-to-face methodology; data collected from June 2008 was via telephone

Source: Ipsos MORI Political Monitor

Nick Clegg – continued visibility problems

Are you satisfied or dissatisfied with the way Nick Clegg is doing his job as leader of the Liberal Democrats?



Base: 1,011 British adults, 17th-19th April 2009

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Note: Data collected prior to May 2008 was collected via face-to-face methodology; data collected from June 2008 was via telephone

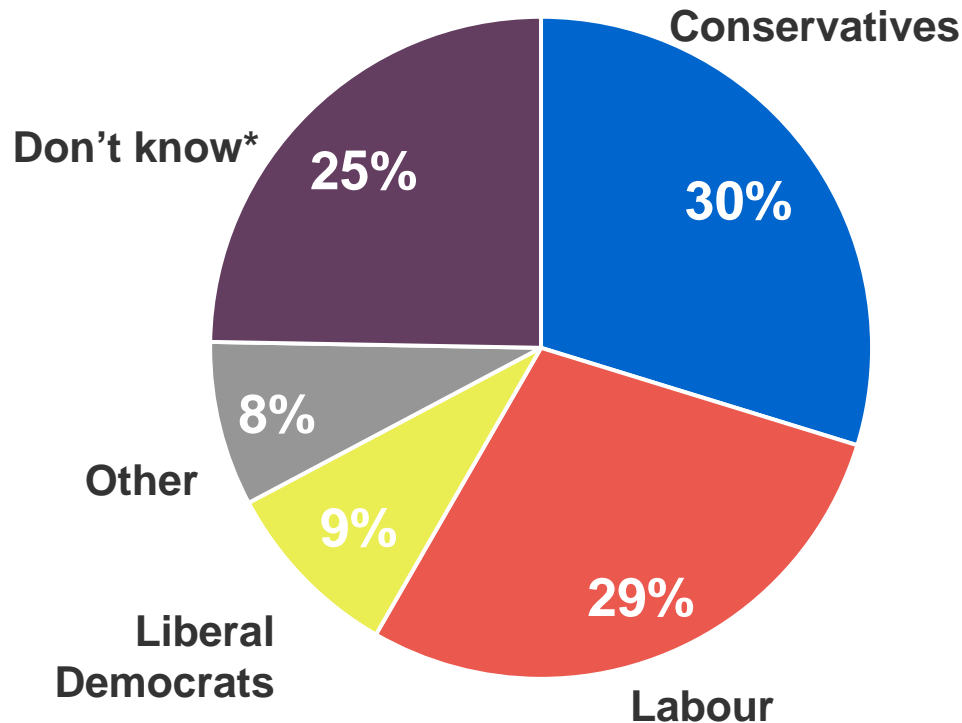
Source: Ipsos MORI Political Monitor



Conservatives ahead on the economy

Which party do you think has the best policies on managing the economy; the Conservatives, Labour, Liberal Democrats or some other party?

January 2009



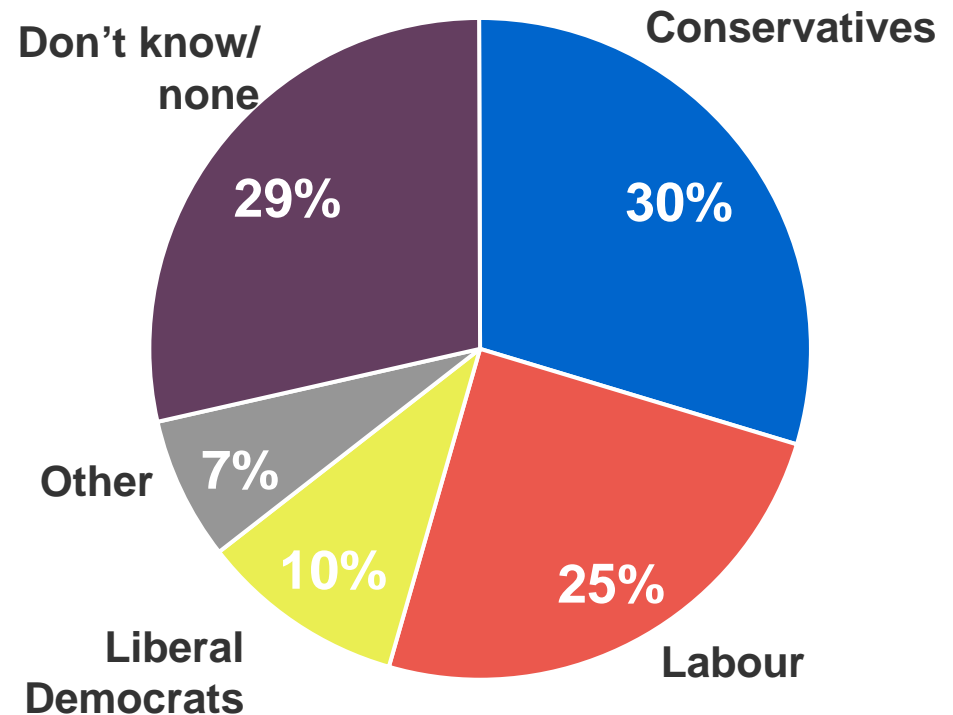
Conservative lead = +1

Base: 1,005 British adults 18+, 16th -18th January 2009

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* 'None' option not given in January 2009

April 2009



Conservative lead = +5

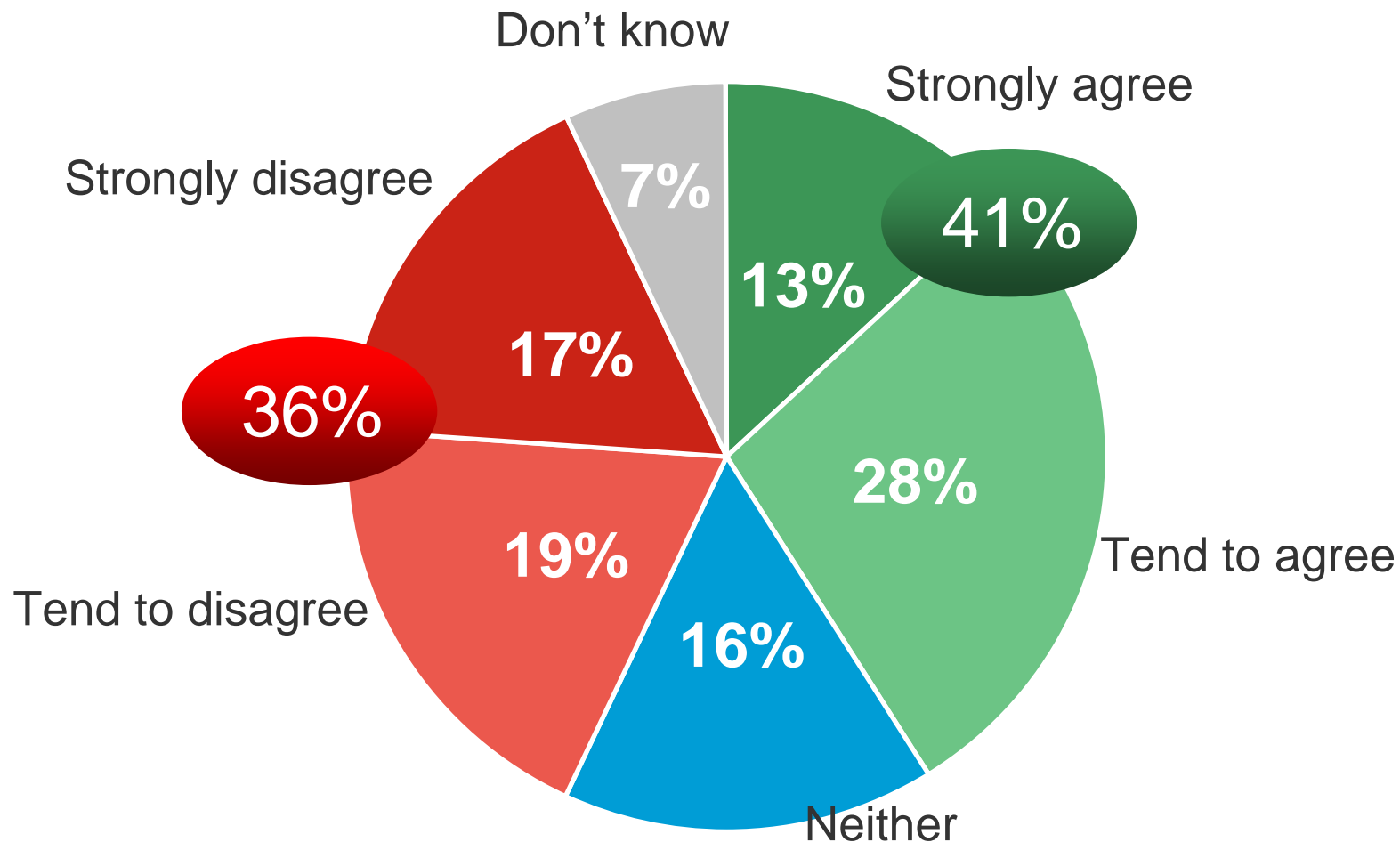
Base: 1,011 British adults 18+, 17-19 April, 2009

Source: Ipsos MORI Political Monitor



Conservatives ready to govern?

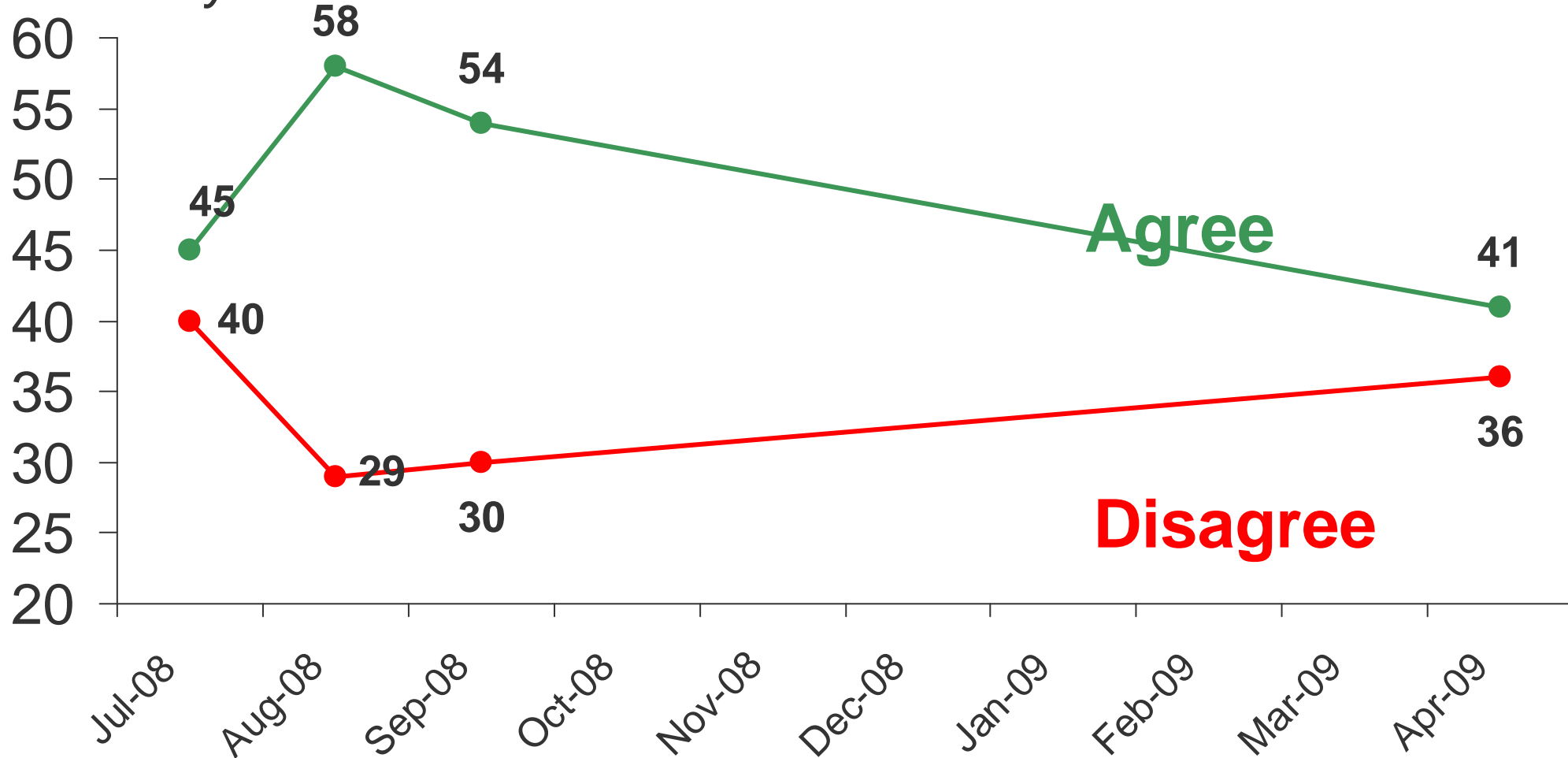
To what extent do you agree or disagree that the Conservatives are ready to form the next Government?



Base: 1,011 British adults 18+, 17th-19th April 2009

But....

To what extent do you agree or disagree that the Conservatives are ready to form the next Government?



Base: c. 1,000 British adults each month

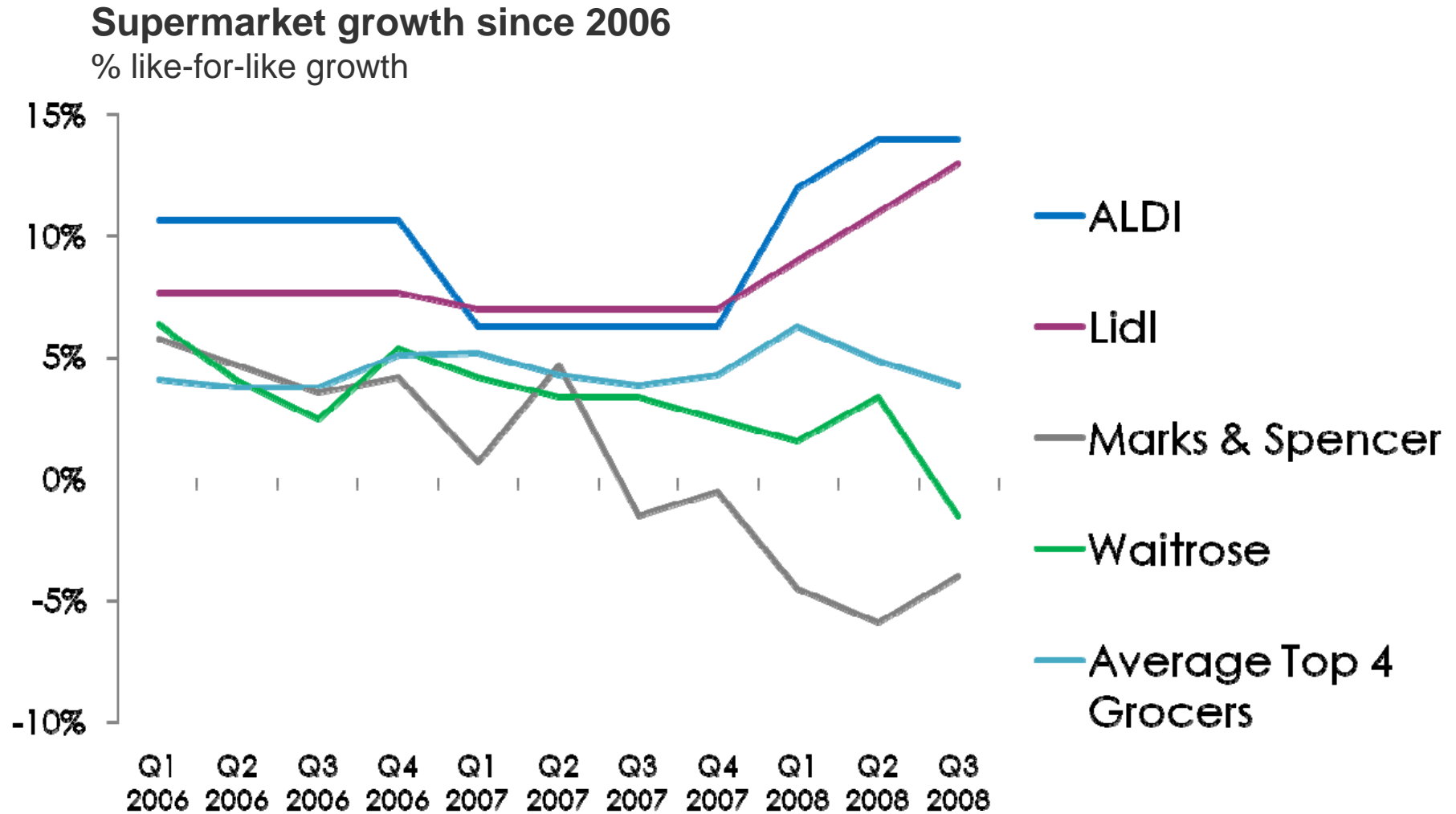
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Source: Ipsos MORI Political Monitor



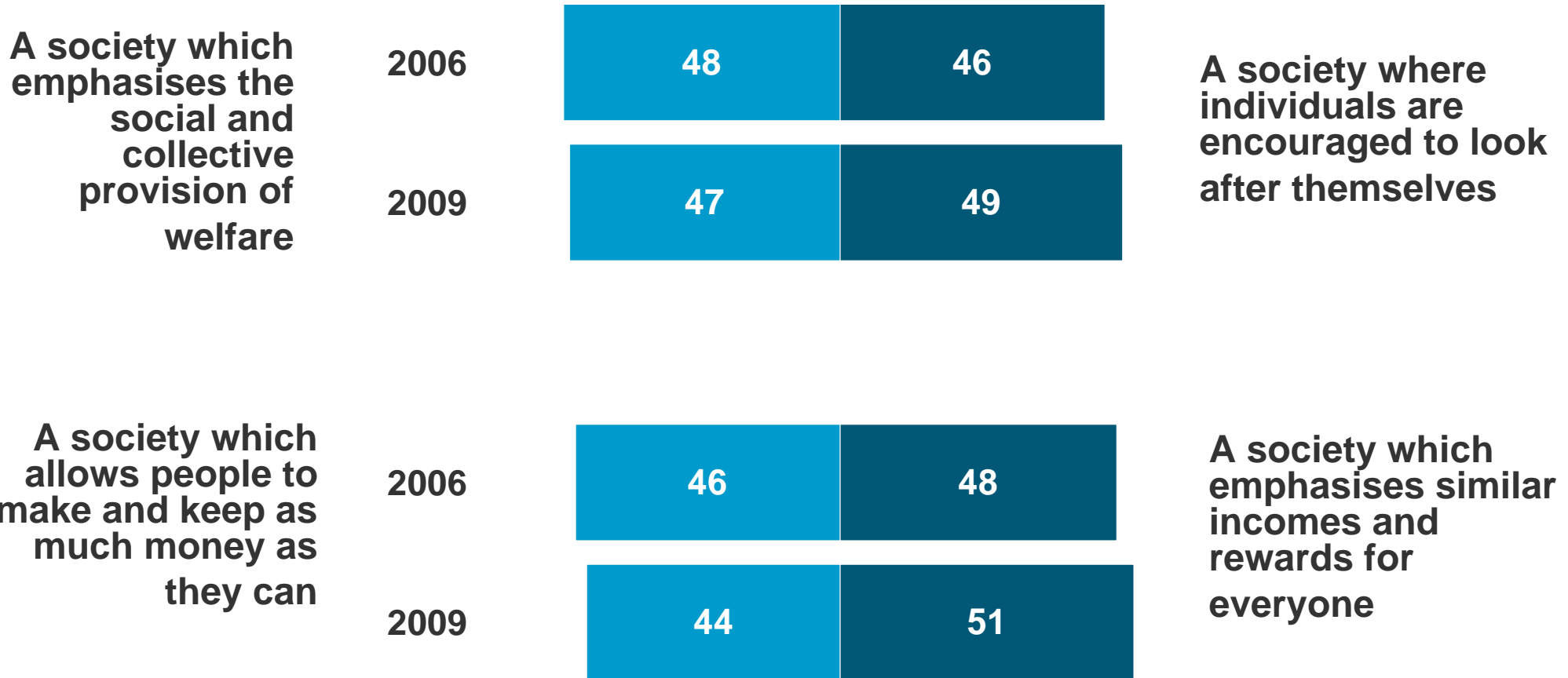
How much has the world changed?

Food retailing transformed by this recession?



A new sober age??

People have different views about the ideal society. For each of these statements, please tell me which one comes closest to your ideal.

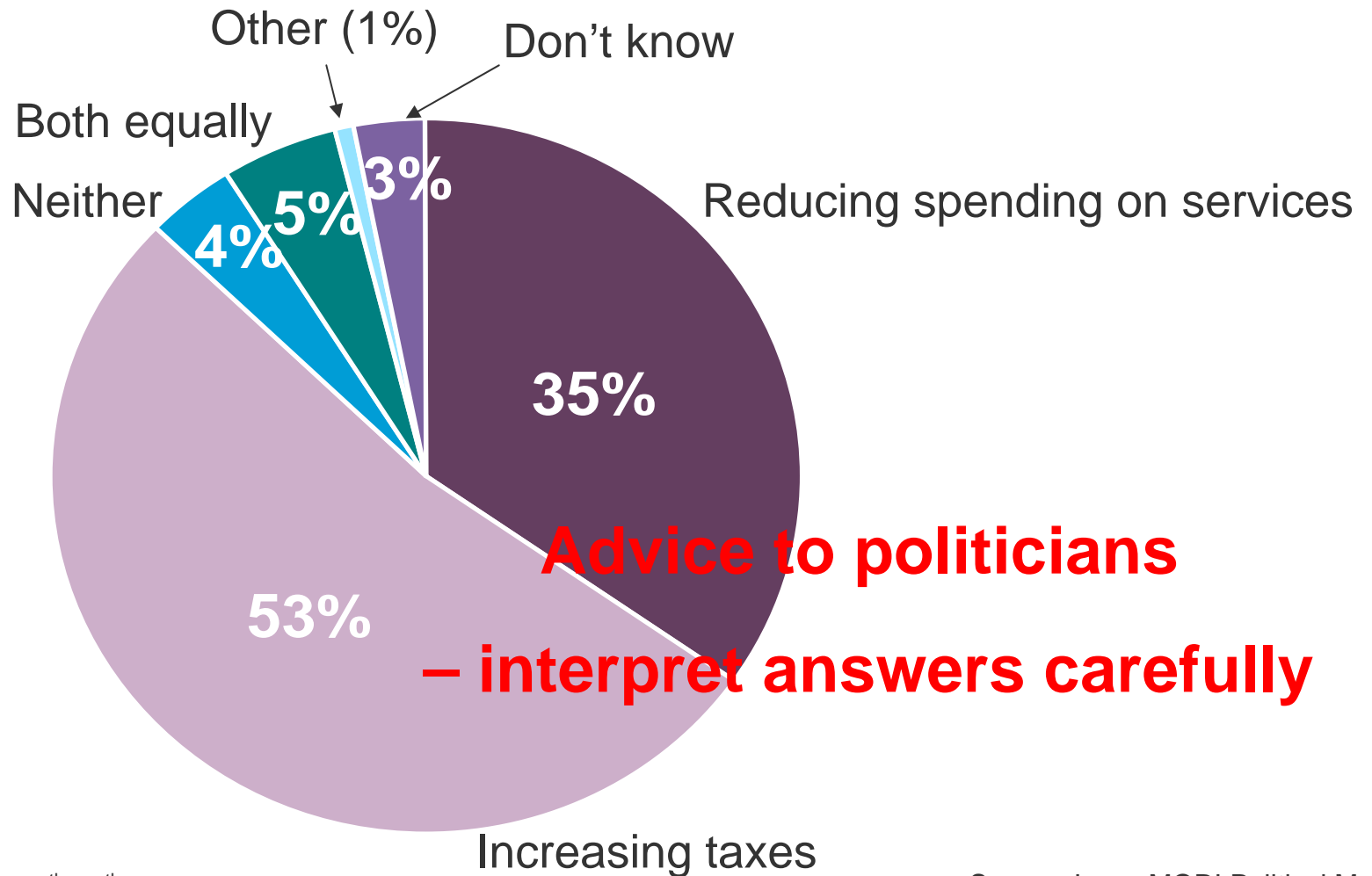


Base: c. 1,000 British adults 18+ each month

How should
government deal
with its huge
borrowing
requirement?

How should government reduce its debts?

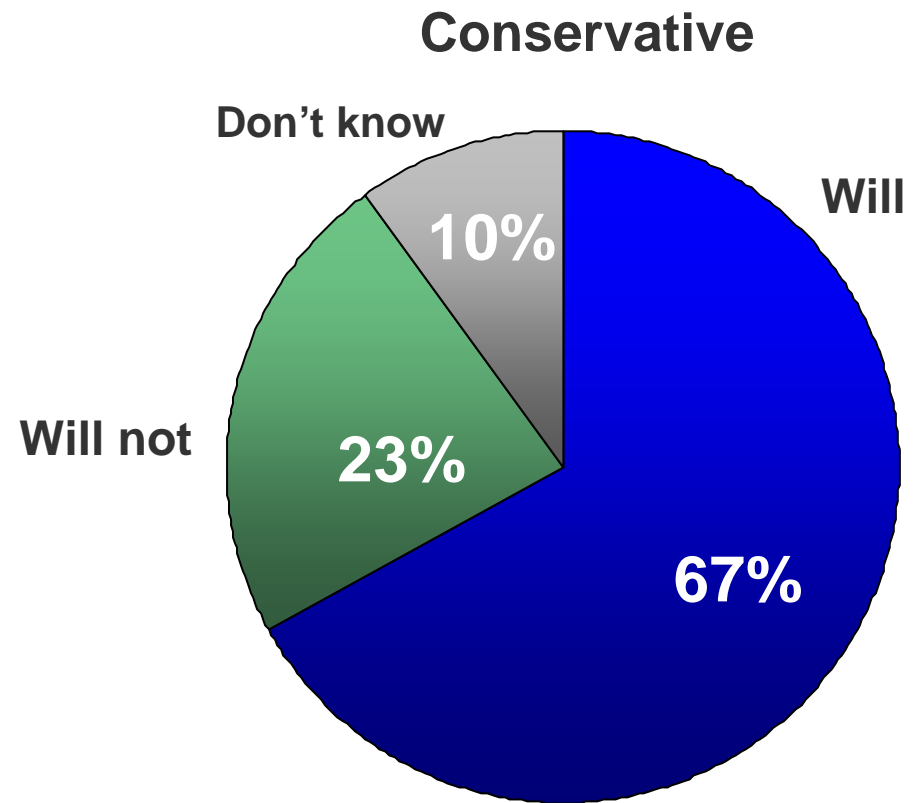
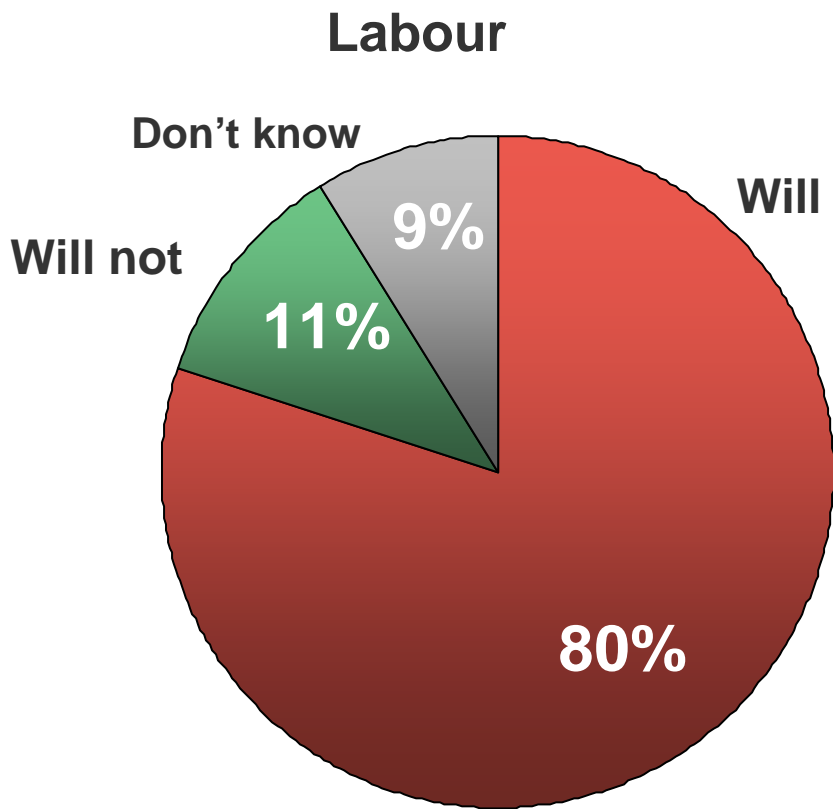
If a future Government had to reduce its debts, there are likely to be two main choices, either increasing taxes, or making cuts to public services. In your view, should they concentrate more on reducing spending on public services or on increasing taxes?



Base: 1,011 British adults 18+, 17th-19th April 2009

Who was convincing on tax in the 2005 general election?.....neither party

Q *If a Labour / Conservative Government is elected after the next general election, do you think it will or will not increase tax?*



In conclusion....

- Some signs that we may be approaching the bottom of the recession
- Labour getting no credit for its handling of the crisis – or from rise in optimism about the future
- Huge uncertainty about the future – electorate has no idea what awaits them
- Cameron remains on track to be Prime Minister next year
 - but still risks turning into Mrs Thatcher without the Falklands....

Questions?

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