



GREAT BREXPECTATIONS

How do readers think Brexit will impact them and what are the implications for brands?

October 2019



Methodology



APPROACH:

Post: 20 minute online survey sent to our Matters Community



FIELDWORK DATES:

9th – 19th September 2019



SAMPLE:

18+ Adults, who read Metro/ Mail on Sunday/ MailOnline/ Metro.co.uk

Analysis groups

Total: 492 respondents

Leave Voters: 314 respondents

Remain Voters: 152 respondents

Our research has been supplement by 3rd party industry research

INTRODUCTION

“The UK’s simmering identity crisis has significant commercial implications.”

**Jack Duckett,
Senior Analyst**



“Brand Britain continues to be the most important asset this country has.”

**Heather Dansie,
Research Director**



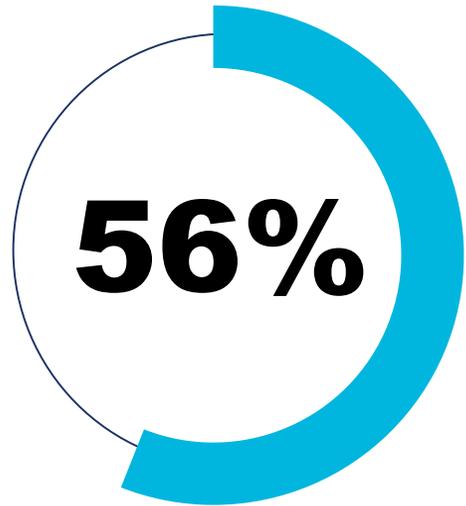
1

DIVIDED, YET DISENGAGED?

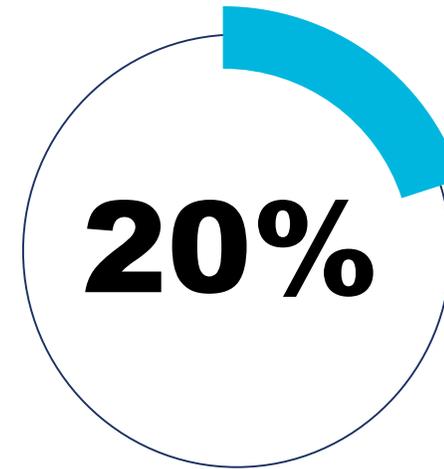
How do our readers currently feel about Brexit?

Damaging and dividing the nation

Fault lines have emerged between families and friends as well as cities and countries!



the referendum has done irreparable damage to social cohesion in this country

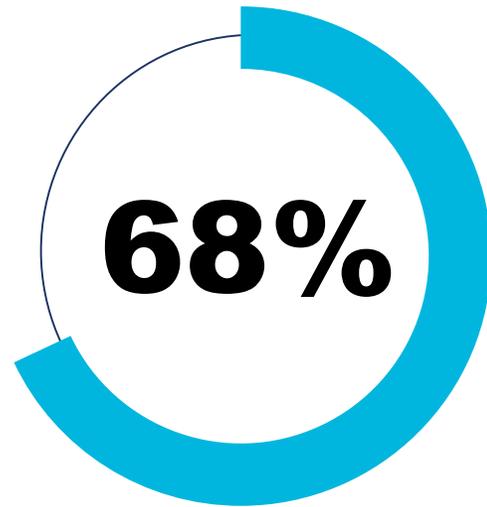


My relationships with some people have become strained because of my views on Brexit

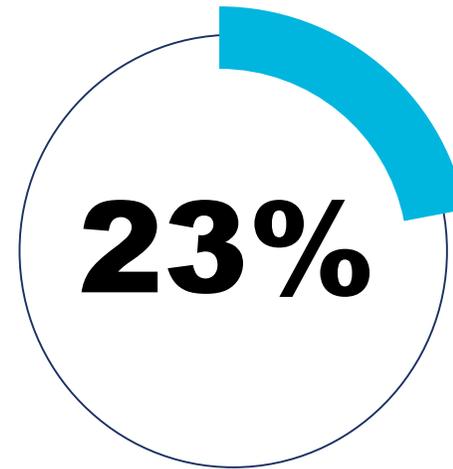


Breeding disillusionment and disengagement

Three years later, Brexit fatigue has well and truly kicked in



I am bored with all talk of Brexit



I am confident I could persuade others of my opinion on Brexit



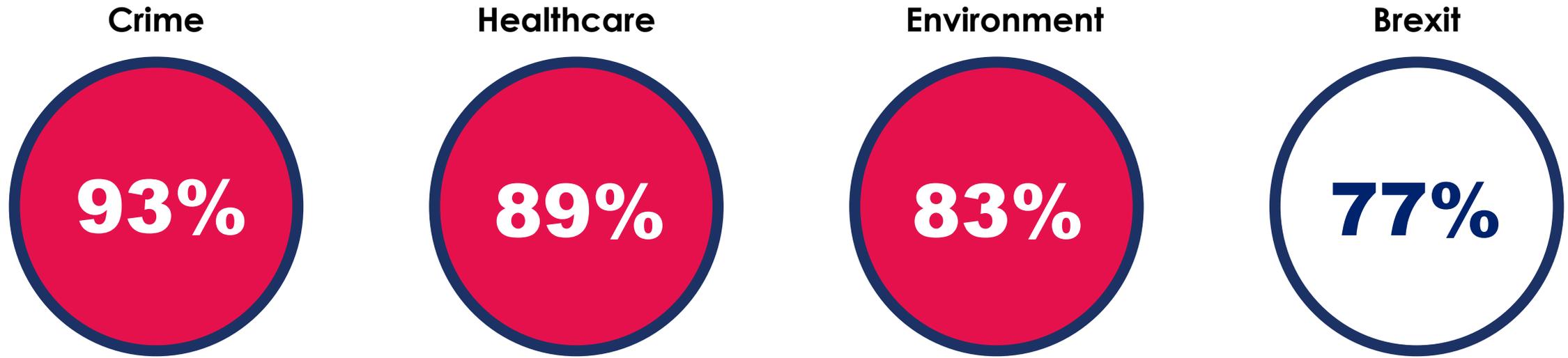
78%

of Brits said the country was on the wrong track in a recent poll conducted by Global Advisor. Britons are the self-proclaimed most pessimistic nation in a poll of 28 countries!



Brelax? There are greater concerns than Brexit

Our readers ranked crime, healthcare and the environment as more important issues



SUMMARY: DIVIDED, YET DISENGAGED

1. Brexit has caused divisions across families, friendship groups as well as towns and cities
2. Brexit is breeding disillusionment and both sides are disengaged
3. Brexit is only one of many issues people care about but is dominating the news agenda

KEY TAKEOUT:

The country is divided, yet disengaged. Brexit is casting a gloomy shadow over readers like a intoxicating pea-souper. However, it is important to remember that Brexit is only one of the many issues facing the country. What both sides agree on, is that they are bored of Brexit. But how do they think it will affect them if and when it finally happens?

2

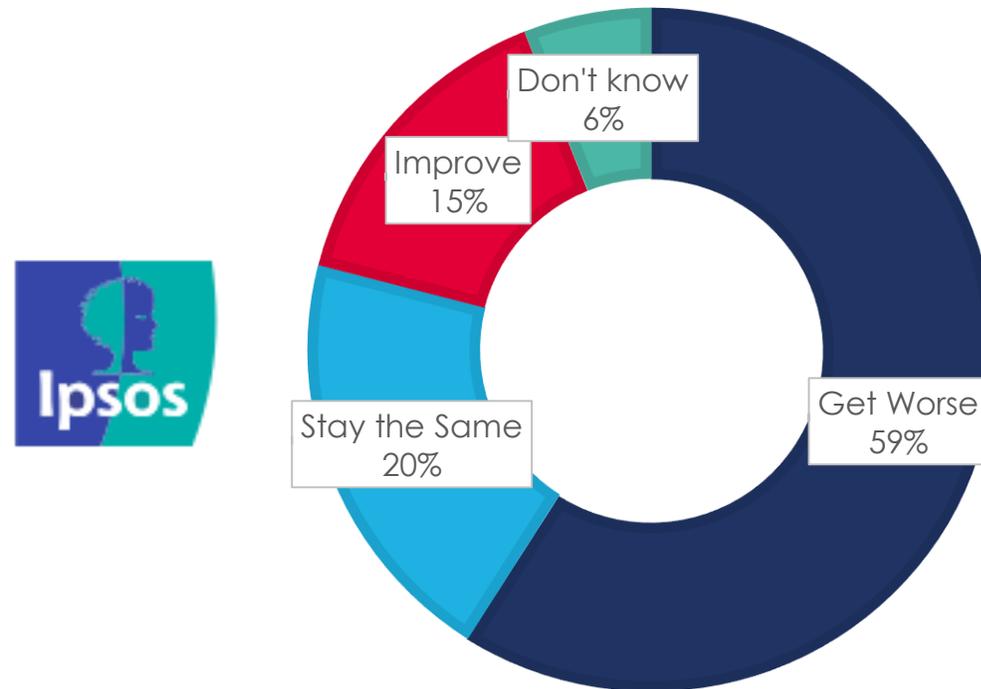
GREAT BREXPRECTATIONS?

How do they think Brexit will impact their personal finances and the performance of economy?

Confidence is low for the next 12 months

59% of Brits surveyed think that the economy will get worse in the next year

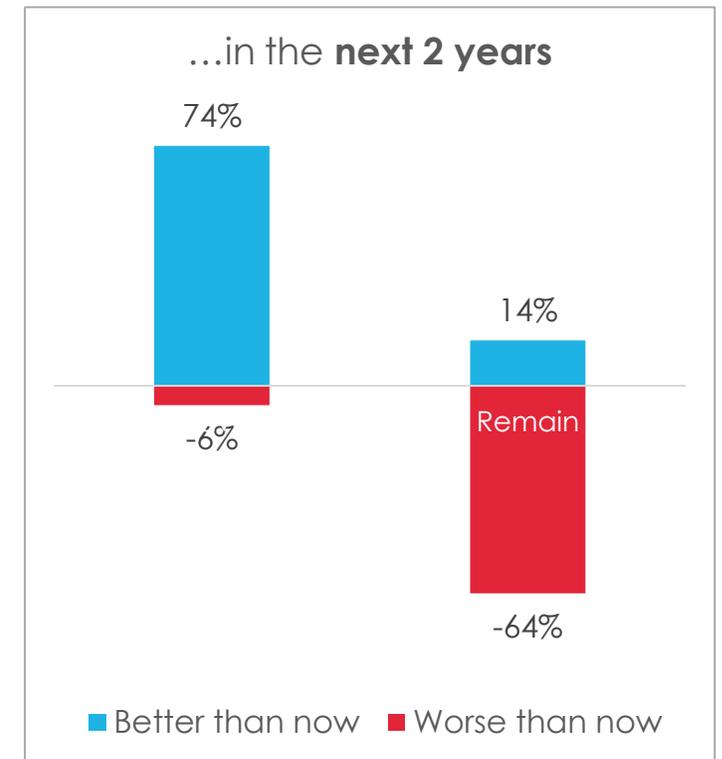
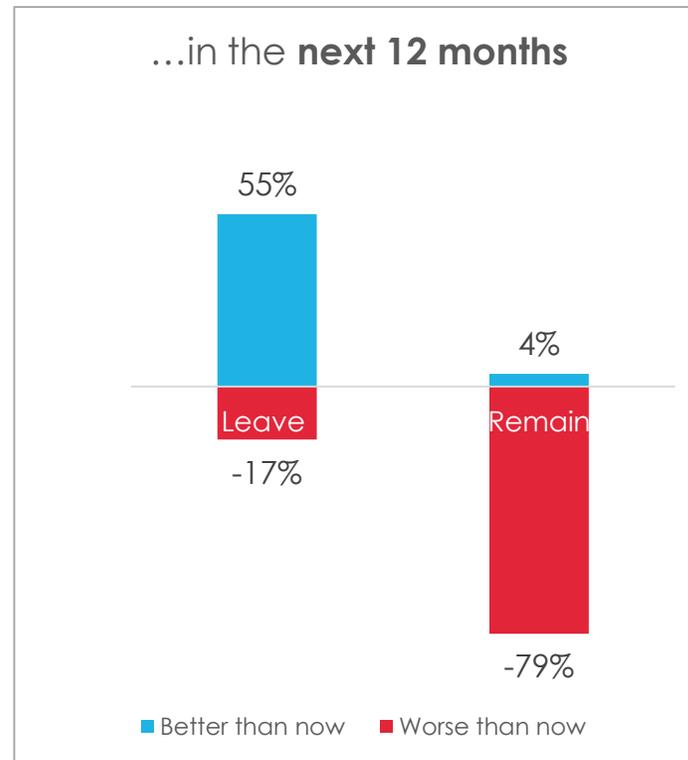
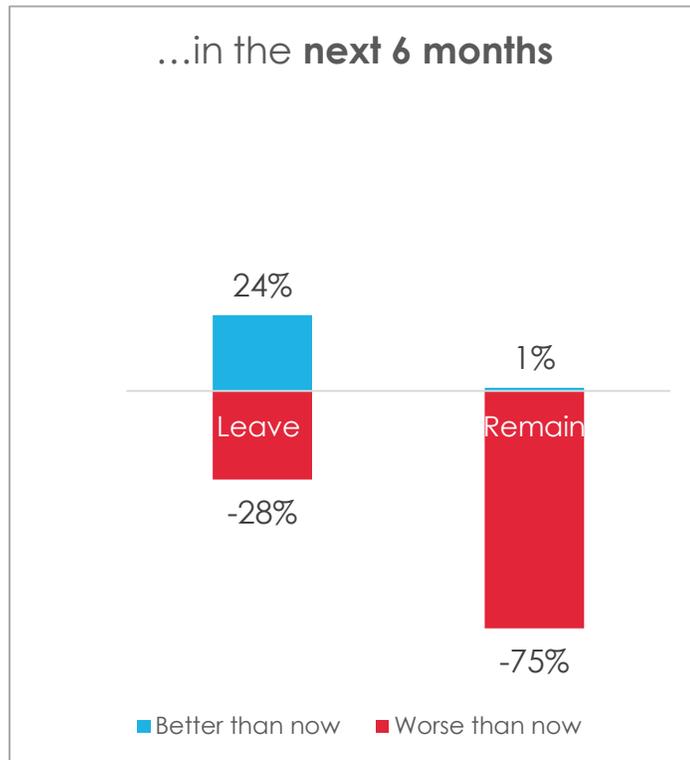
Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Getting worse before it gets...

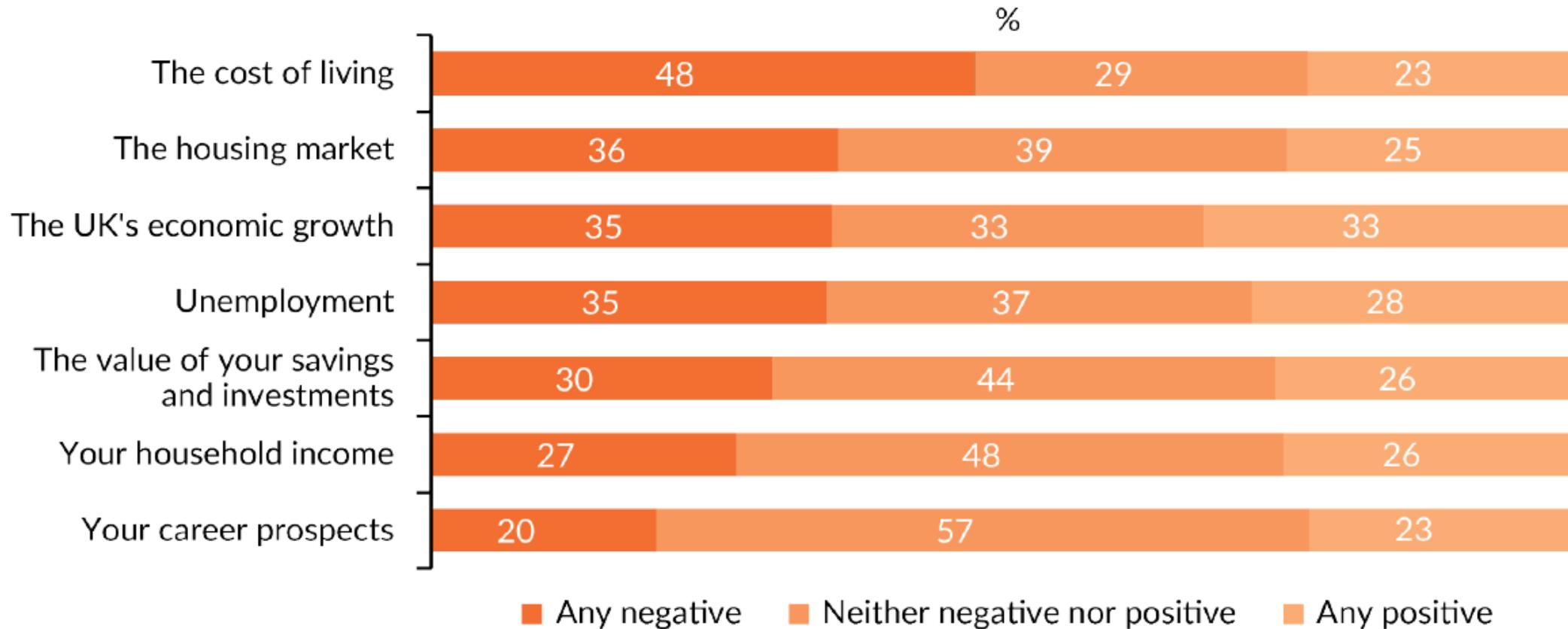
...better if you're a leave voter. Even worse if you are a remain voter

Q) On the following scale, how do you think that the UK's economy will perform...?



Brits think Brexit will impact cost of living

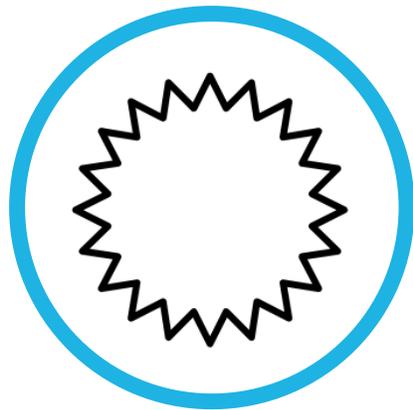
There appears to be underlying optimism about personal finances despite the feeling that they are negative about the broader economy



What are their Brexpectations from brands?

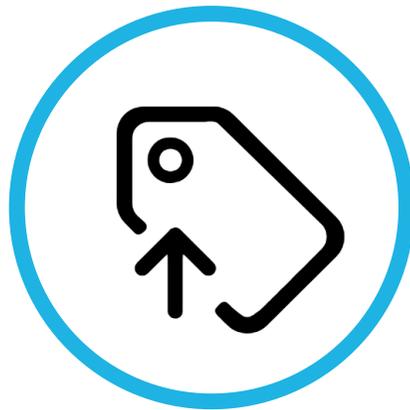
Many expect to see price increases and others expect declines in quality and availability

Q) What, if anything, do you expect to see from leading brands in the next 12 months



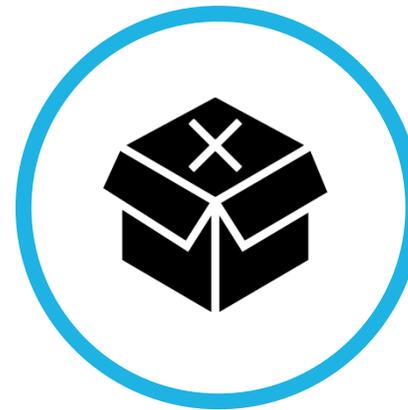
33%

**more promotions
for their products**



32%

**increased prices
in the long term**



22%

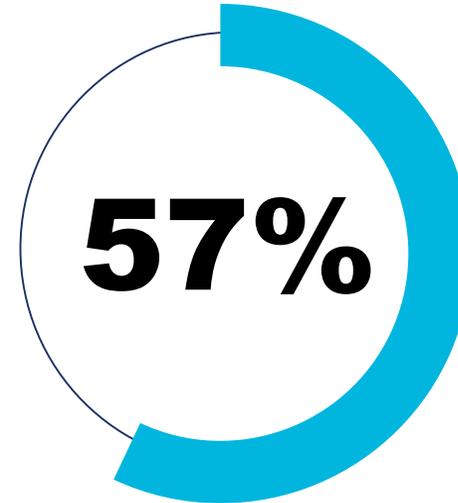
**reduction
in availability**



21%

**Compromises
on the quality**

They want help to navigate uncertainty



think business leaders should help consumers to navigate the economic uncertainty



SUMMARY: GREAT BREXPECTATIONS?

1. There's consensus that the next 6-12 months will be a difficult period
2. Brits expect their costs of living to increase and the potential for falls in quality of products
3. They are open to brands that help them to navigate the economic uncertainty

KEY TAKEOUT:

No matter which side you are on, Leave or Remain, you think things are likely to get slightly worse before they get better. With some consumers worried about price increases and product shortages. Brands have a role to play in reassuring consumers that they have a plan and they are there to help guide them through difficult times.



3

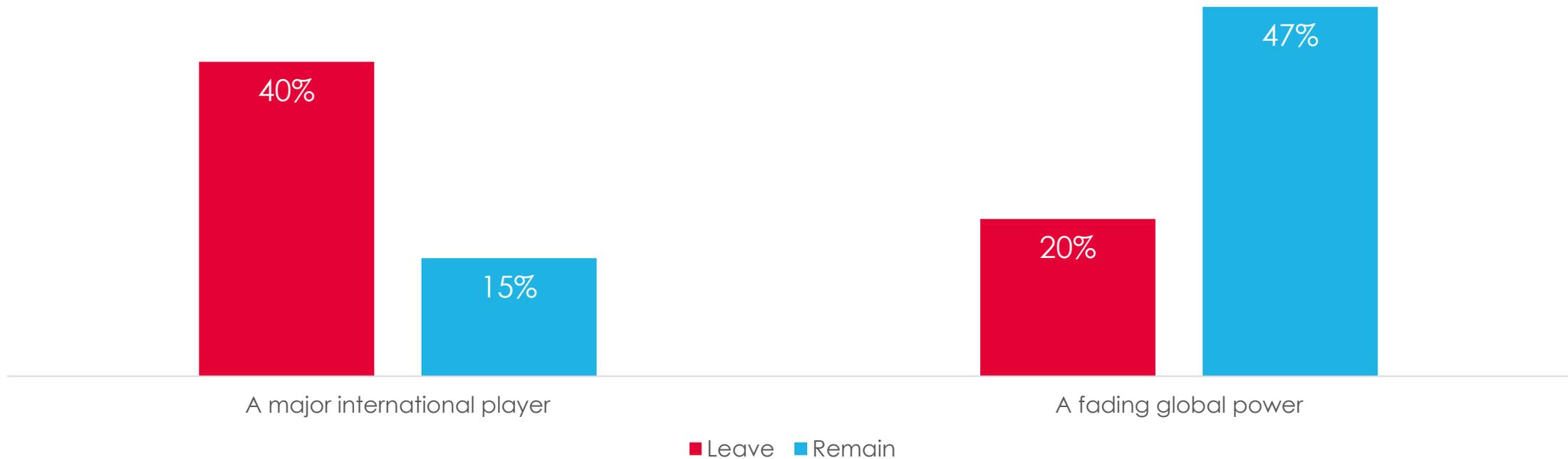
BREXIT AND BRAND BRITAIN

How is Britishness perceived against a Brexit backdrop?

There's confusion around Britain's trajectory

With Leavers more positive about Britain's international role than remainers

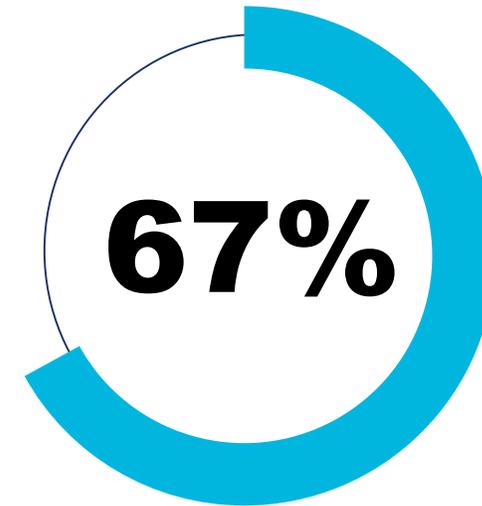
Which, if any, of the following values, statements and or qualities do you strongly associate with Great Britain?



And inherent positivity towards home grown

2 in 3 favour goods made in Britain

**MADE IN
BRITAIN**



**I feel more favourably towards
products and services that are
made in Britain**



Brits want brands to break stereotypes

As well as identifying who you are talking to and what they want to hear



1. Recognise Diversity

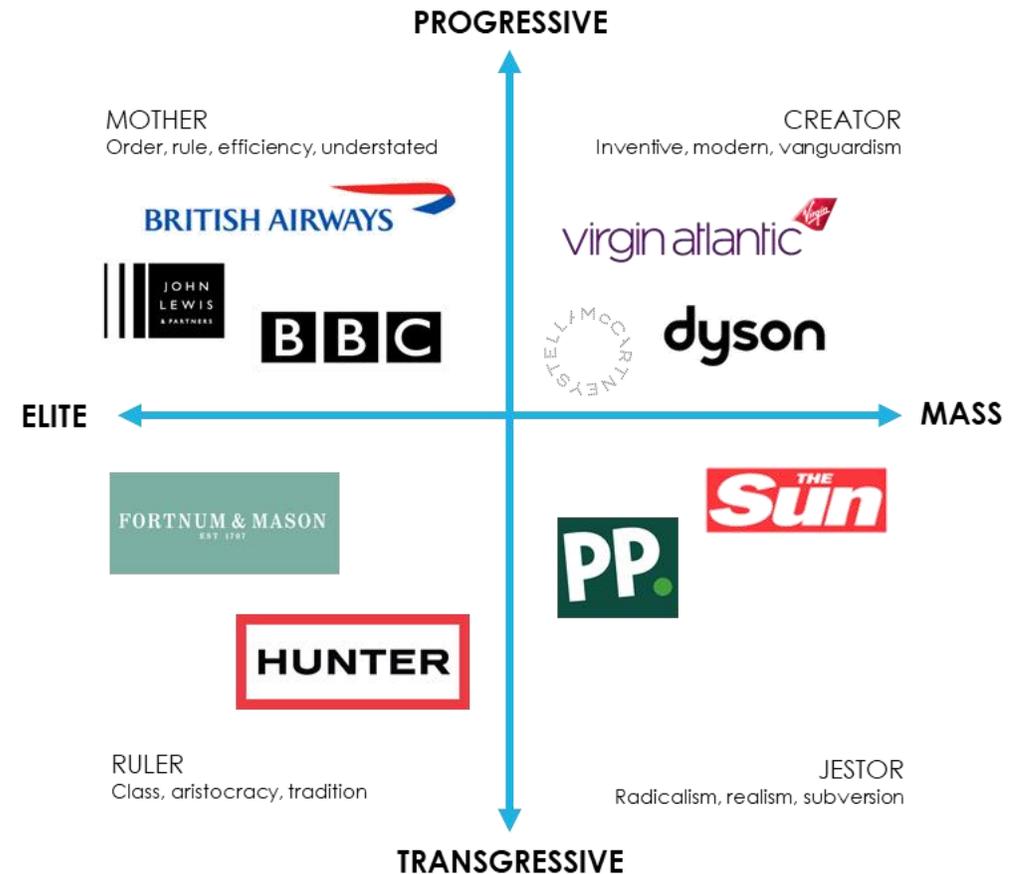
Britain is almost always an addition to one's national repertoire. It accepts that people exist in the middle spaces and will tug on different parts of their identity.

2. Brand Britain is not brand London

British and international brands need to understand that regional diversity is key. Brand Britain must continue to strengthen its urban stories from across the country.

3. Break boundaries

Really successful brands don't sit comfortably in their boxes. Brands that inflect, mock or straddle the different codes are able to tap into the paradox of modern Britain.

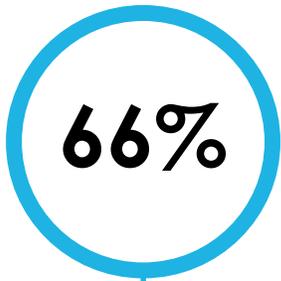


Be inclusive and involve those underrepresented

Groups not often represented in advertising are viewed most positively

Q) Which of the following groups do you have a positive opinion of?

Hard Working Families



Business people



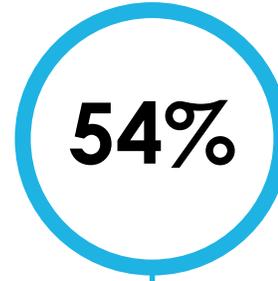
Pensioners



Millennials



Working Class



Middle Class



People from North



People from South



And focus on what unites us

Newsworks identified happiness, hard work and generosity as traits that unite us

WHAT DIVIDES US?

MONEY

AGE STEREOTYPES

CLASS STEREOTYPES

WHAT UNITES US?

HARD WORK

GENEROSITY

HAPPINESS

SUMMARY

1. Pride, Tolerance and Fairness are traits of Britishness that shine through the Brexit gloom
2. There is still positivity towards Britain and British brands
3. It is more important than ever to understand your consumer
4. Focus on what unites us and be inclusive

KEY TAKEOUT:

Britain is broken but is not unfixable. We are a proud nation and should celebrate our achievements. The nation is facing a period of uncertainty and moving forward we need to celebrate what unifying factors rather than what divides us. Brands can have an important role to play in this.



3

KEY TAKEOUTS



1

BE PROUD

Despite our current divisions. We still define ourselves as a proud and tolerant nation and this should be celebrated.

Brands should (obviously) avoid 'Brexit', but should celebrate Britain with a small 'b'. Removing reference to the flag but not ignoring their roots or values.

Nor should they shy away from the traits that unite us. Newsworks identified these as graft, hard work and community, but pride and fairness should be added this.



2

BE THERE

Increased cost of living is the most anticipated consequence of Brexit, so consumers are open to brands helping to help them navigate the uncertainty.

Brands could help by being there. This could be demonstrated through price guarantees, quality assurances but most importantly understanding their needs and empathising with their situations, to alleviate the niggles and concerns.

Page 26 Daily Mail, Wednesday, September 11, 2019

150 Sainsbury's
EST. 1899

2 Salmon Fillets

£3

240g

£ LOCKED DOWN

100s of prices locked down for at least 8 weeks

Serving Suggestion

Look for the padlock on 100s of products in supermarkets. Prices locked down for at least 8 weeks. Selected products only, subject to availability. Not in centrals and locals. For dates see shelf edge labels on stores or sainsbury.co.uk. By Sainsbury's 2 Salmon Fillets 240g, £3.00, £12.50/kg

The advertisement features a central image of a salmon fillet on a fork, garnished with green onions and lemon slices. A large orange circle contains the price '£3' and the weight '240g'. A red padlock icon with the text '£ LOCKED DOWN' is positioned below the price. The background is white with decorative elements of lemon and green onions. A woman's face is visible in the bottom right corner, and the Sainsbury's 150th anniversary logo is in the top right.

3

BE BRAVE

There are issues that many deem more important than Brexit and brands should not forget this. Britishness is not a dirty word, and seemingly divisive issues need not be taboo.

They expect more from advertising, with more inclusivity, more thought provoking and more humour demanded.

Brands should shun the vanilla, reconnect in an honest manner with an increasingly cynical and disengaged populous.

ITV interrupts Britain's Got Talent to get people talking about mental health



England's 100% Yorkshire Football Team

- Southgate: lives in Yorkshire
- Delph, Maguire, Rose, Stones, Vardy, Walker: from Yorkshire
- Butland, Cahill, Pickford, Pope, Trippier: played in Yorkshire
- Alexander-Arnold: likes Yorkshire puddings
- Dier: has driven through Yorkshire on the M1
- Alli: once said the word "Yorkshire"
- Jones: owns a flat cap
- Kane: holidays in Bridlington
- Lingard: is the great-great-grandson of Charlotte Brontë
- Loftus-Cheek: breeds whippets
- Henderson: named after Henderson's Relish
- Rashford: liked Ed Sheeran before he was big
- Sterling: has a tattoo of Neville Longbottom
- Young: owns all of Last of the Summer Wine on Blu-ray
- Welbeck: has a season pass to the National Railway Museum

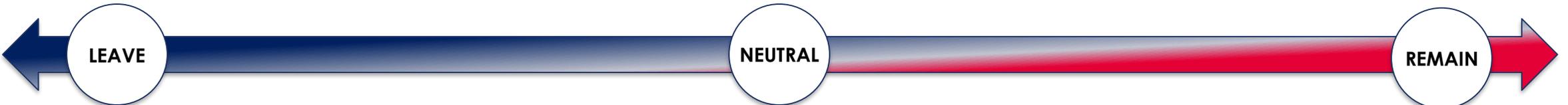


Our audiences span the Brexit divide

Our nine brands, editorial voices and audiences span the both sides of the Brexit divide



0.7bn
Article views on
Brexit content since
referendum*



SOURCE: *Omniure 2016-2019 – Number of article views on Brexit content across our digital portfolio since the Brexit referendum