State of the Nation 2014
The year of identity

Ipsos MORI for British Future
The State of the Nation survey

• Polling was conducted on behalf of British Future by Ipsos MORI from 6-11 December 2013
• We surveyed a representative sample of 2,244 online adults aged 16-75 in Great Britain, including 394 people in Scotland and 106 in Wales.
• Surveys were conducted across the country and the results have been weighted to the profile of the population.
2014: keep calm and carry on

• Green shoots of (fragile) economic optimism – so George Osborne’s budget is Britons’ key moment of 2014.
• UK to survive: Only 1 in 5 Scots think Salmond will win independence vote.
• Euro election: Farage fans say UKIP mostly a protest vote
• Sceptical Brits still a long way from EU exit, but want Cameron to secure a better deal
• Bulgarians and Romanians welcomed by most if they make the effort to work and fit in
• Britain unites for solemn First World War centenary – rejecting calls for both victory celebration or for no commemoration at all.
• But England fans stop dreaming of World Cup glory - while Commonwealth games and Six Nations rugby are top sports events for Scotland and Wales.
Who do we think we are? England

Which, if any, best describes how you see yourself? - England

- More English than British: 34% (18% 'English not British')
- Equally English and British: 38%
- More British than English: 22%
- Don't know: 6%

Ipsos MORI for British Future (Dec 2013).
England base size 1,744
Who do we think we are? Scotland

Which, if any, best describes how you see yourself? - Scotland

- More Scottish than British: 49% (24% 'Scottish not British')
- Equally Scottish and British: 31%
- More British than Scottish: 19%
- Don't know: 2%

Ipsos MORI for British Future (Dec 2013).
Scotland base size 394
Who do we think we are? Wales

Which, if any, best describes how you see yourself? - Wales

- More Welsh than British: 42% (15% 'Welsh not British')
- Equally Welsh and British: 22%
- More British than Welsh: 35%
- Don't know: 2%

Ipsos MORI for British Future (Dec 2013). Wales base size 106
Personal optimism, national anxieties

Will 2014 be a good or bad year

- **Optimistic**
- **Neither**
- **Pessimistic**

### Personal/family
- Optimistic: 50
- Neither: 28
- Pessimistic: 20

### Place I live
- Optimistic: 36
- Neither: 36
- Pessimistic: 25

### Britain
- Optimistic: 29
- Neither: 29
- Pessimistic: 39

### Europe
- Optimistic: 14
- Neither: 38
- Pessimistic: 42
Anxious but hopeful about the economy: optimism rising as pessimism falls

- Optimistic
- Neither
- Pessimistic

2012: Optimistic 74, Neither 9, Pessimistic 40
2013: Optimistic 50, Neither 19, Pessimistic 29
2014: Optimistic 40, Neither 29, Pessimistic 29
Economic optimism: a question of politics – and class

<table>
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<th>Pessimist</th>
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Ipsos MORI for British Future (Dec 2013)
Its gloomier up north – as south looks up

<table>
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<td>+11</td>
<td>-10</td>
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<td>+30</td>
<td>+18</td>
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<td>+33</td>
<td>+22</td>
<td>0</td>
<td>-19</td>
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Ipsos MORI for British Future (Dec 2013)
One nation?
Our year of (multiple) identities

State of the Nation 2014
Which 2014 events matter most to you personally?

- The budget: GB 47, Welsh 33, English 32, Scottish 45
- Football World Cup: GB 24, Welsh 23, English 22, Scottish 24
- Scottish referendum: GB 72, Welsh 11, English 16, Scottish 22
- Romania and Bulgaria immigration: GB 23, Welsh 18, English 22, Scottish 23
- Centenary WW1: GB 17, Welsh 13, English 13, Scottish 16
- Commonwealth Games: GB 38, Welsh 24, English 24, Scottish 38
- Rugby Six Nations: GB 25, Welsh 10, English 10, Scottish 11
- European Elections: GB 14, Welsh 11, English 11, Scottish 2
- None: GB 20, Welsh 19, English 17, Scottish 10
Which 2014 events most affect how you feel about Britain?

- The budget: GB 31, Welsh 35, English 29, Scottish 31
- Football World Cup: GB 5, Welsh 12, English 13, Scottish 13
- Scottish referendum: GB 26, Welsh 22, English 25, Scottish 25
- Romania and Bulgaria immigration: GB 26, Welsh 29, English 29, Scottish 29
- Centenary WW1: GB 18, Welsh 18, English 14, Scottish 14
- Commonwealth Games: GB 37, Welsh 15, English 15, Scottish 15
- Rugby Six Nations: GB 29, Welsh 8, English 7, Scottish 4
- European Elections: GB 24, Welsh 22, English 15, Scottish 15
- None: GB 25, Welsh 22, English 15, Scottish 15
## Not ‘one nation’ in 2014

(Based on question “Which three events matter most to you personally”)

<table>
<thead>
<tr>
<th>Rank</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
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<td>1st</td>
<td>The budget 47%</td>
<td>Scottish referendum 72%</td>
<td>The budget 33%</td>
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<tr>
<td>2nd</td>
<td>World Cup football 24%</td>
<td>Commonwealth Games 38%</td>
<td>Rugby six nations 25%</td>
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<td>3rd</td>
<td>Romania/Bulgaria 23%</td>
<td>The budget 32%</td>
<td>Scottish referendum 24%</td>
</tr>
<tr>
<td>4th</td>
<td>WW1 centenary 17%</td>
<td>WW1 centenary 13%</td>
<td>Commonwealth Games 24%</td>
</tr>
<tr>
<td>5th</td>
<td>Scottish referendum 16%</td>
<td>World Cup football 11% and Romania and Bulgaria immigration 11% (tied)</td>
<td>World Cup football 23%</td>
</tr>
</tbody>
</table>
January
Immigration from Romania and Bulgaria
State of the Nation 2014
What we expect Romanians and Bulgarians who come here to do

Q: "What are the most important things EU migrants can do to be accepted?"

- Learn English language: 69
- Get a job and pay taxes: 64
- Not claim benefits: 48
- Spend money in Britain, not send it home: 29
- Make friends outside their community: 20
- Celebrate British customs: 4
- Support British sporting teams: 1
- Nothing – shouldn't have to do anything: 2
- Nothing – will never be accepted: 2
- Don't know: 6
Minimum standards and benefits matter more than in/out questions

Q: "How should the UK government respond to immigration from Romania and Bulgaria?"

- Enforce minimum wage: 45
- Restrict benefits that people from other: 63
- Stay in EU but try to change rules: 24
- Leave EU if rules don't change: 26
- Support areas with higher immigration: 22
- Advice to promote integration: 18
- Shouldn't do anything: 2
- Other: 2
- Don't know: 9
A worried, yet welcoming, nation?

Romanians and Bulgarians coming to Britain have got to learn the language, work hard and pay taxes, fit in and be part of the community. If they do that we should welcome them to the UK.

Agree: 68%
Disagree: 13%
Neither: 15%
Britain in Europe and the European Elections
State of the Nation 2014
How much Europe do we want?

Britain's longterm policy should be ...

- Leave the EU: 28%
- Stay and try to reduce EU powers: 17%
- Leave things as they are: 3%
- Stay in EU and try to increase EU powers: 8%
- Work towards single European government: 6%
- Don't know: 3%
Most prefer EU renegotiation to exit – but UKIP supporters think its time to get out.

Do you think Britain’s long-term policy should be ...

- **Leave EU**: 73 (Conservative), 22 (Labour), 19 (LibDem), 15 (UKIP), 17 (All)
- **Stay in, reduce powers**: 41 (Conservative), 43 (Labour), 19 (LibDem), 11 (UKIP), 17 (All)
- **Leave as they are**: 38 (Conservative), 14 (Labour), 15 (LibDem), 11 (UKIP), 17 (All)
- **Stay in, increase powers**: 2 (Conservative), 8 (Labour), 3 (LibDem), 6 (UKIP), 17 (All)
- **Single European government**: 6 (Conservative), 11 (Labour), 6 (LibDem), 4 (UKIP), 17 (All)
- **Don’t know**: 6 (Conservative), 11 (Labour), 6 (LibDem), 4 (UKIP), 17 (All)
Most UKIP voters say May 2014 is a protest message

Q: Which of the following reasons describes why you vote for the party you choose in the European election?

- Party with the best policies to run Britain
- Party with the best policies on Europe
- Send a message to other parties that I'm unhappy
- Other

![Bar chart showing reasons for voting](chart.png)
June-July
The World Cup
State of the Nation 2014
Who will you support in the World Cup?

- Nobody - won't watch: 37 Welsh, 31 English, 20 Scottish
- Nobody - will watch as neutral: 20 Welsh, 13 English, 7 Scottish
- Another team: 10 Welsh, 4 English, 5 Scottish
- Whoever plays England: 15 Welsh, 8 English, 4 Scottish
- England: 53 Welsh, 27 English, 13 Scottish
50 years of hurt – how England fans stopped dreaming

Q: How far will England get in the World Cup?

<table>
<thead>
<tr>
<th>Stage</th>
<th>GB</th>
<th>Welsh</th>
<th>English</th>
<th>Scottish</th>
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<td>2</td>
<td>3</td>
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<tr>
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<td>Quarter-final</td>
<td>11</td>
<td>15</td>
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<tr>
<td>Second Round</td>
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<td></td>
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<tr>
<td>Knocked out in first round</td>
<td>26</td>
<td>27</td>
<td>29</td>
<td>32</td>
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<tr>
<td>Don't know</td>
<td>25</td>
<td>27</td>
<td>29</td>
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</tbody>
</table>

Don't know
How far will England get?

(All GB respondents, excluding 26% who answered “Don’t know”)

- **Win**: 3
- **Final**: 2
- **Semi-final**: 6
- **Quarter-final**: 21
- **Second Round**: 32
- **Knocked out in first round**: 36
August
The first world war centenary
State of the Nation 2014
A solemn commemoration, not victory pride

How should Britain mark the centenary of the first world war in 2014?

- Remembrance of loss of life and national reflection (59%)
- Proud commemoration of victory in just war (22%)
- No commemoration of unnecessary war (6%)
September
Scotland votes
State of the Nation 2014
Should Scotland be an independent country?

Voters across Britain want Scotland to stay in the Union – Scots themselves are the least likely to still be on the fence.
Can you predict the Scots’ referendum result?

Three-quarters of Scots who express a view think there will be a No vote.

- **GB**: 24% Remain in UK, 48% Vote for independence, 28% Other
- **Scotland**: 22% Remain in UK, 58% Vote for independence, 20% Other
- **England**: 24% Remain in UK, 47% Vote for independence, 29% Other
- **Wales**: 20% Remain in UK, 56% Vote for independence, 24% Other

Legend:
- Red: Remain in UK
- Green: Vote for independence
The impact of independence

• 47% of Britain say whole country weaker if Scotland leaves
• 57% of Scots say UK weaker without Scotland (vs 45% of English).
• 50% of Scots think Scotland will be weaker if it leaves UK; 34% think they’ll be stronger
• 60% of English think an independent Scotland would be a weaker country; 31% of them think England would be weaker if Scotland left the UK.
British Future...