2015

# THE YEAR OF UNCERTAINTY

*State of the Nation*
*2015*

British Future...

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# 2015: A year of uncertainty

## On Thursday 7 May this year, we will choose who governs our country. More than at any time in the last 40 years, it's a fairly open contest. We don't even know how many parties will end up forming a government, let alone which ones.

A little bit of uncertainty can be a good thing. Winston Churchill, who faced no small amount of uncertainty in his time, said that without it "the drama of human life would be destroyed."

Our new ICM poll for this year's State of the Nation report finds that most people think a Conservative-led government is more likely than a Labour-led one. Yet it remains tight. No party has more than 17% of the public saying they'll 'definitely' vote for them.

How people predict the outcome depends very much on who they are, with most party supporters feeling that their team are in with a shout: 88% of Conservatives think their party will end up in government, while 78% of Labour supporters think theirs will. They can't both be right. That two-thirds of UKIP supporters think Nigel Farage and Co. will be part of the government and 49% of Lib Dems think they will, shows how open a contest it could be.

In an election which may well be dominated by questions about immigration and Europe, not everyone is confident that we can emerge from the debate unscathed, with social and community cohesion intact. Our poll finds that only a quarter of Britons believe we can come through the 2015 election campaign secure that we can have good community relations across our multi-faith and multi-ethnic society.

A similar number worry that we won't: that the tone of the election campaign will damage relations between different communities, while another group of voters wish the gloves would come off more.

Uncertainty about the outcome of an election is a good thing in a democracy. Uncertainty about whether we can handle having the debates, however, is not. A democratic election must address big issues of popular concern - but all sides need to commit to ensuring that we have a constructive and decent debate.

We won't have the open and constructive debate that most people want if both of the major parties decide that their best approach now is to try to "change the subject" when immigration is raised and to return to their favourite issues instead. Ironically, both of the major parties have now shown that they can also gain national newspaper headlines by not talking about immigration, such as when the Conservatives chose to omit immigration from their six major election themes, and so generated headlines about the missing issue, not the ones that they were seeking to project.

For UKIP, this election is the party's big moment in the spotlight. It could be their chance to shine and to show that they are a credible, mainstream party. But spotlights show up people's flaws. UKIP politicians, including the party leader, have overstepped the mark in past

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campaigns.

There's a role here for civil society and faith groups in helping to police the boundaries of this debate. Not by trying to shut debate down, but instead calling out any politician who steps outside the boundaries of what most of the public considers acceptable. Most, for example, reject prejudice based on the colour of someone's skin; and by a margin of two to one, people say that all parties should uphold Britain's proud tradition of protecting refugees.

Our State of the Nation findings offer an important reason why we might find more confidence in Britain's ability to handle the immigration and identity debates. In a polarised 'culture war', between pro-migration metropolitan liberals and 'close the border' rejectionists, there will be no winners, only losers – whether the battleground is immigration, identity or Islam.

Of course, there will be some votes in appeals to either end of the political spectrum – but no majority victory nor stable governing coalition could be won on that basis. Nor could it enable the type of broad alliances needed to win a majority in a referendum to decide on our place in Europe, which may be the biggest political event of the next parliament.

So our appeal for an open and responsible debate can be made not just to the social conscience of politicians but to their enlightened self-interest too.

Britain today is a considerably more liberal country than it was in the 1950s, 1980s or even in the 1990s. Whatever their party colours, any politician who seeks to appeal primarily to pessimism in modern Britain is likely to find themselves on the wrong side of important social changes, such as rising education and a big generational shift towards greater confidence about the diverse society we have become.

At the same time, the majority are anxious, rather than confident about both identity and opportunity in our society today. Day-dreaming about independence for London so metropolitans can escape from their fellow citizens is a poor substitute for engaging seriously with these anxieties.

In a political campaign, parties will seek to mobilise their own support, but need to try to reach out to secure new support too. The truth is that no party that tries to treat a General Election as if it were a single-issue campaign - whether on immigration, or the economy, or the NHS - will secure the broad confidence or support that it takes to elect a government. Voters expect political leaders who want to govern our country to talk about all of the big issues facing Britain, not just those where their party is more popular.

It is the job of politicians to articulate different views, but to aggregate them too. This has become more difficult as our fragmented politics show. But in a fractious society there will also be a greater appetite for politicians who do seek to tell a broader story about what brings us together - one which can engage people in the cities and on the coast, across the generations, and build common cause across class, faith and ethnic lines in the Britain we share.

In this year of uncertainty there are a number of reasons to be confident that this country – which in July marks 75 years since Churchill's historic defeat of fascism in the Battle of Britain – can show once again that our values of democracy, free speech and tolerance will prevail.

In a polarised 'culture war', between pro-migration liberals and 'close the border' rejectionists, there will be no winners, only losers – whether the battleground is immigration, identity or Islam

# About this report: State of the Nation 2015

This is the fourth State of the Nation report from British Future.

Each January, since our launch in 2012, the State of the Nation report has sought to look ahead to the big events and issues that will dominate Britain's conversations in the areas that matter most to us: integration and immigration, identity and opportunity.

In 2012, our launch report examined how the public felt the Jubilee and the Olympics might affect our sense of identity, and took a long-term perspective about how people felt Britain had changed, for better or worse, over the post-war decades. In 2013, we assessed how economic anxieties were affecting views on immigration, integration and opportunity in British society. The following year, the State of the Nation 2014 report looked at how the public felt significant national events - from the Scottish referendum to the European elections, the Centenary of the First World War, Commonwealth Games and the World Cup - would both reflect and potentially reshape our national identities. 2015 is our first general election year, so will be a year in which both politicians and citizens will debate issues of identity and immigration, as part of the democratic process of choosing who governs and represents us during the next Parliament.

British Future is firmly independent and non-partisan. It will be clear from the content of this report that it does not seek to advocate for any political party. Rather, State of the Nation 2015 captures why the way that people think and often disagree about identity, immigration, integration and opportunity will present challenges for all voices, across the political spectrum. The report therefore looks to capture how those who seek to represent us, from whatever perspective, might engage constructively with people's hopes and fears about what these issues mean in a changing society.

What is also clear, from the findings reported here, is that people believe that the way in which these democratic debates are conducted will have a significant influence not only on the outcomes of elections, but also on the climate of British society, and how confident we can be in our ability to deal with these issues successfully in our democracy and in the society that we share.

Polling for this report was by ICM for British Future. ICM surveyed a representative sample of 2,285 adults aged 18+ in GB online between 28-30 November 2014. Surveys were conducted across the country and the results have been weighted to the profile of all adults. The number of interviews with respondents in Scotland was boosted to 400 to give more representative results. ICM is a member of the British Polling Council and abides by its rules. Further information at www.icmresearch.com.

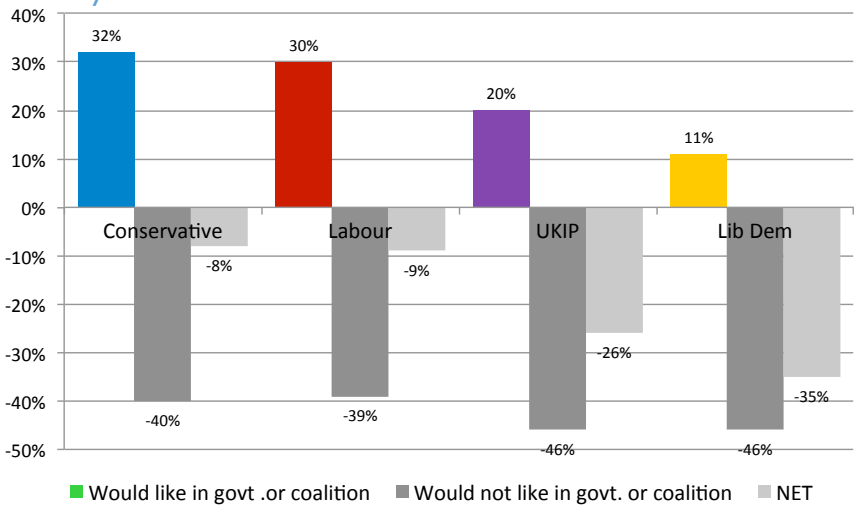
Full findings and questions relating to each graphic in State of the Nation can be found in the 'notes and tables' section at the back of the report.

# 1. The 2015 election - who will win? (And can't you all please lose?)

## What if they threw an election and nobody won? Overall, the British public think that 'none of the above' could well be the most appropriate outcome to the most unpredictable British General Election for forty years.

Every party gets a 'thumbs down' verdict when the public are asked whether they would like to see them as part of the next government.

Figure 1. Which parties would you like in government, and which would you not like?




Every party gets a thumbs down verdict when the public is asked if they would like to see them in government

But there will have to be a government of some kind after May - whether a majority, minority or coalition government of some combination or another.

Our State of the Nation 'wisdom of crowds' approach to political crystal ball-gazing finds that, once the electoral hurly-burly is done and the votes have been cast and counted, most people in Britain anticipate that the Conservative Party will still be in government.

54% of people think it is more likely than not that the Conservatives will be in government – while 25% think this is unlikely. The prediction that the Conservatives will still be running the show after May's election is broadly shared across Britain, regardless of region, social class, gender or age.

Conservative and Labour voters disagree about this - with Labour voters fairly confident that David Cameron and his party will be booted out, while Conservatives can't see Ed Miliband leading his party across the threshold of Downing Street. However, both Liberal Democrat and UKIP voters do think it is, on balance, likely that the Conservatives will stay in power.

However, Labour's election chances can't be written off. Many people

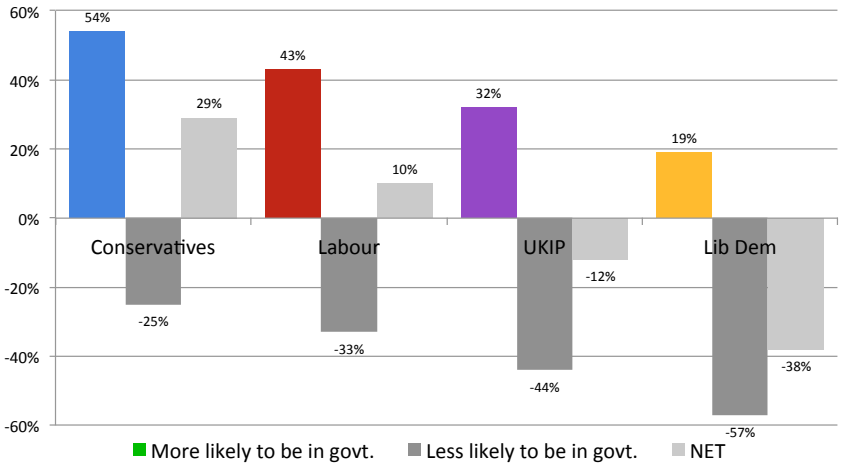
think they have a chance in the election. Indeed, 43% think it is more likely than not that they will end up in power, while 33% think that is unlikely.

Across the demographic groups in the survey, only ethnic minority respondents thought that Labour was more likely to be in the next government than the Conservatives, and then only by a slim margin, while Scottish and Welsh respondents found the outcome on more of a knife edge than the English.

Despite the Conservatives seeing strong leadership as one of their primary selling points at the election, respondents to this survey took a clearer view about the likelihood of the Conservative Party being in government than in predicting that David Cameron would emerge as Prime Minister. 35% predict that Cameron will be the occupant of 10 Downing Street after the election, while 21% are picturing Ed Miliband outside the famous black door. Reflecting wider uncertainty about the result, a third of people (30%) don't feel they can make a Prime Ministerial prediction.

Most people in Britain anticipate that the Conservative Party will still be in government

Figure 2. Which parties do you think are more or less likely to be in government?



# 2. Definitely Maybe: Who has decided? And who hasn't?

## Dig a little deeper and the image of an apathetic country, equally indifferent to the election choices on offer, starts to erode.

Many people are passionate about the election choices available - just over half of the country is already 100% certain about how they will vote in May - but in quite different ways. They each make up a series of minority electoral tribes.

What is most striking about "the partisans", of all political colours, is their sense of conviction that enough people will share their views to make a decisive impact on the election.

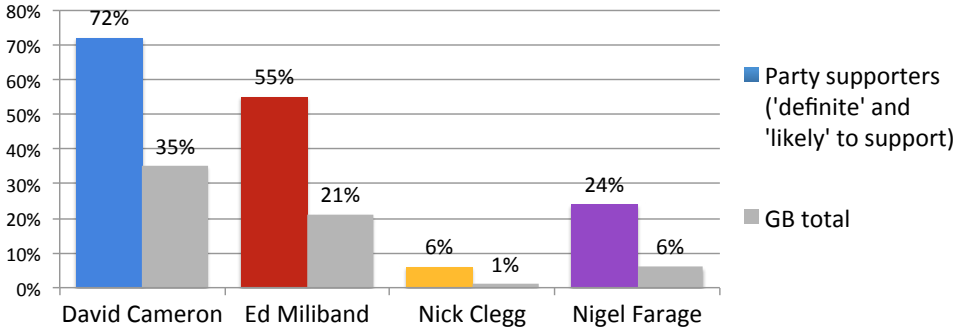
One in three (35%) of those who are certain to vote UKIP predict that Nigel Farage will be standing waving on the steps of number 10 Downing Street as our next Prime Minister. These 'definitely UKIP' voters make up a tenth of the electorate. If only a (sizeable) minority of them anticipate Prime Minister Farage, most (78%) of the committed UKIP vote believes that UKIP will be in the government after May's election.

55% of Labour voters believe Ed Miliband will make it to Downing Street, rising to 65% among those who say they are certain to vote Labour. 79% of 'definite' Conservatives expect David Cameron to be Prime Minister - and 93% think the Conservatives will be in government.

Liberal Democrats are more realistic than Ukippers: just 6% of Lib Dem voters think Nick Clegg will be the next Prime Minister. Yet half of the small band of committed Lib Dems believe their party will do well enough to be needed in the government again after the election.

The mood of the 2015 election will largely be set by the contrast between the certainties of the partisan tribes and the uncertainties of the wider electorate

Figure 3. Who will be Prime Minister after the General Election?




The mood among the professional politicians at Westminster has been fairly gloomy, on all sides of the House, but the State of the Nation poll shows that the supporters of each party are much more confident that they will have plenty to celebrate in May.

The mood of the 2015 election will largely be set by this contrast between the certainties of the partisan tribes and the uncertainties of the wider electorate. The hardest thing for these partisans may be to understand why the voters who they need to persuade don't already see the world as they do.

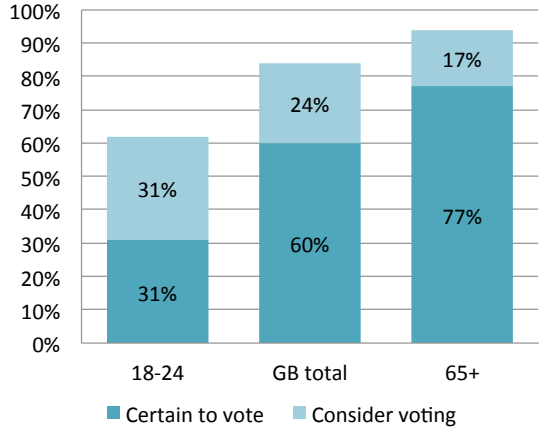
# 3. Will 2015's first-time voters be first-time non-voters?

## The youth vote has the potential to significantly influence the outcome of 2015's tightly-contested election. Approximately 3.3 million first-time voters are in a position to swing constituency results on a scale like never before. All they have to do is vote. And there lies the problem.

Young voters historically have the lowest turn out to elections in the UK. Our new findings suggest that 18-24 year olds are still only half as likely to actually cast their vote as the rest of the electorate.

However, with one third (31%) of 18-24 year olds certain to vote, and another third considering voting, there are potentially over 2 million votes up for grabs.

Figure 4. Likelihood to vote by age

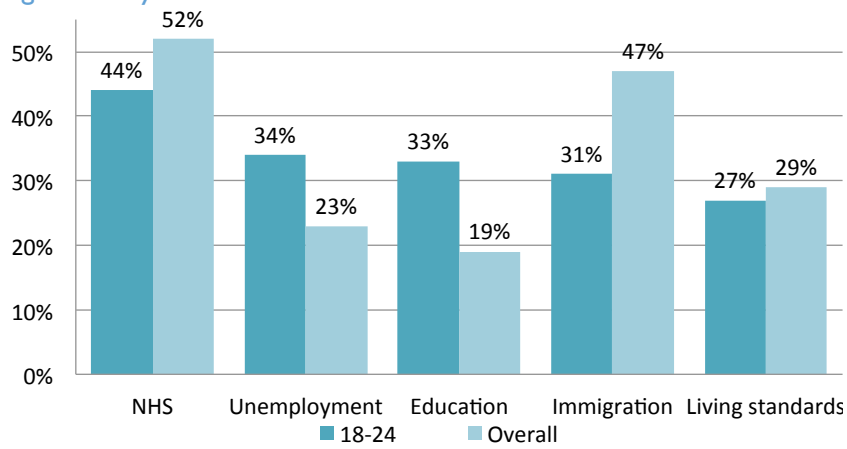



Polling for State of the Nation 2015 shows that young people's votes will be determined by different issues to those of the population as a whole. Looking at the top five issues most likely to influence how they will cast their ballot, it is the NHS, unemployment, education, immigration and living standards that rank as their key issues.

Immigration still features as an electoral issue for this generation of voters, but less prominently than for their elders. Greater significance, understandably for those still preparing to enter the world of work, is attached to unemployment and education. The fact that only half as many 18-24s fall into the 'migration sceptic' group, who give immigration a score of 0-2 out of 10, as the population as a whole suggests that young voters hold a more pragmatic view on their own circumstances and are not persuaded by arguments that a tough immigration policy is the solution to these problems. A large proportion of young voters are still waiting to be won over by clear proposals that will tackle the issues that matter most to them.

Young voters hold a more pragmatic view on their own circumstances and are not persuaded by arguments that a tough immigration policy is the solution to their problems

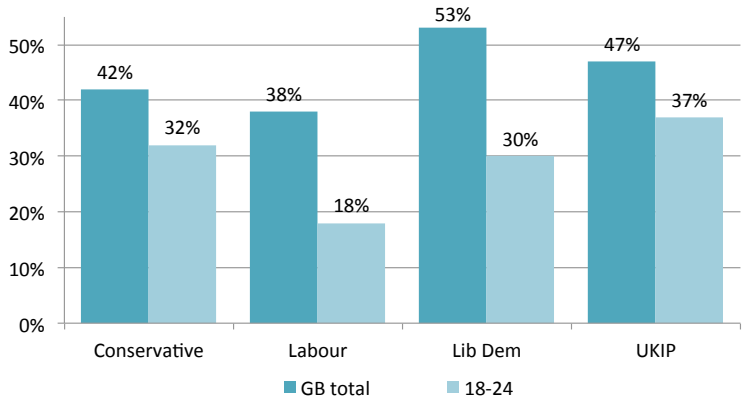
Figure 5. Key election issues for first-time voters




Young voters of today are a liberal generation, even more so in fact than the young voters of the past.[1] They are also less politically partisan than their elders. 18-24 year-olds say that they would never vote for a particular party less than any other group. With young voters showing Ed Miliband's party the lowest level of hostility by a significant margin, Labour appears to have the most to gain from this particular demographic.

The Liberal Democrats may also be pleasantly surprised by the small number of 'never' voters among the 18-24s. While the 'great betrayal' on tuition fees arguably had a far greater effect upon 2015's first time voters than any other group, the 18-24s are significantly more forgiving than the rest of the electorate, with only 30% saying they would never vote for the Liberal Democrats, compared to an average of 53% across the country.

Figure 6. Would 'never' vote for particular political party




UKIP has typically struggled to appeal to younger voters, and the fact that only 11% of 18-24 year olds would like to see UKIP forming part of the government after the general election, compared to 29% of those over 65, confirms that Nigel Farage's party still has a long way to go to win over the youngest voters.

In addition to those already planning to vote, there are over a million first time voters still to decide whether they will cast their ballot, and which box they will cross if they do. In an election which is likely to be won or lost in marginal seats gained with majorities in the hundreds, the presence in every constituency of 1,500 undecided youth votes, on average, could tip the balance.

1 The Economist, June 2013. 'Britain and the young - Generation Boris'. http://www.economist.com/news/britain/21578666-britains-youth-are-not-just-more-liberal-their-elders-they-are-also-more-liberal-any

# 4. What are the big issues of 2015?

## What's at stake in the General Election of 2015? The supporters of different parties have quite different views about that.

Asked what would most influence their vote, it was the NHS which emerged as the top issue overall in this survey, with over half of respondents (52%) choosing it as one of their top five issues, narrowly ahead of immigration (47%) and the economy (46%).

But it depends who you ask. Supporters of different parties have very different priorities.

Conservative voters will go to the polls thinking mostly about the economy.

Labour voters see the election as a chance to protect the NHS, chosen by 59% of the party's supporters.

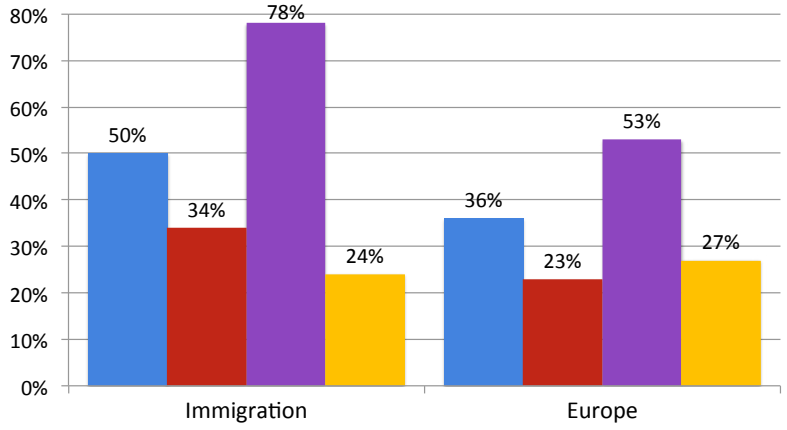
For UKIP voters, the issue that really matters is immigration, with 78% making this one of their priorities. Surprisingly, only just over half of UKIP voters (53%) selected Europe as one of their top five issues.

The priority issues with the broadest agreement are the NHS and the economy. The NHS ranks in the top three issues across the political spectrum, ranked third by both Conservative and UKIP voters, and top for Liberal Democrats, ahead of the economy.

There is more political disagreement about the importance of immigration and Europe, and about poverty and inequality too.

The NHS ranks in the top three issues for voters across the political spectrum

Figure 7. By party support: Immigration and Europe as issues that will influence how people vote




Immigration ranks first for UKIP voters and second for Conservatives, but fifth for Labour voters, and as low as 12th for Liberal Democrats.

While UKIP voters rank Europe second to immigration, and Conservatives place it fifth, it was the ninth and tenth priority for Lib Dem and Labour voters respectively.

Poverty and inequality, the third most important influence for Labour supporters, ranked eighth for Liberal Democrats, and outside the top ten for Conservative and UKIP voters.

Only Conservative voters ranked the best policies on taxation in their

top five issues, with it ranking sixth for Liberal Democrats, eighth for UKIP supporters and eleventh for Labour voters.

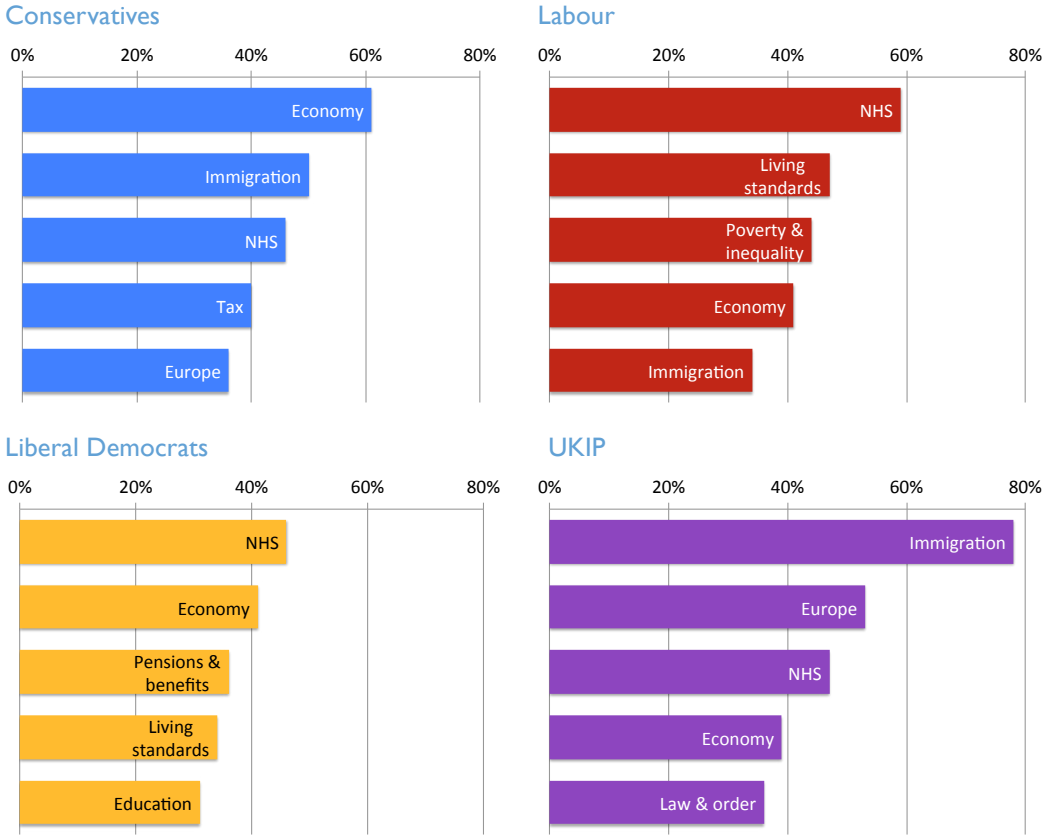
Although voters proved much more likely to identify specific issues as key to their votes, 29% of Conservatives identified the 'best party leader' as a reason for their vote – compared to 18% of UKIP voters, 16% of Liberal Democrats and 12% of Labour supporters. Overall, only 16% of respondents chose having the best leader as an important influence on their vote.

One in four voters (24%) said that the party with the worldview closest to theirs was an important influence, with 15% saying they would vote for the 'best of a bad bunch' and 9% that their vote was because it was who they or their family had always supported.

The opening skirmishes of the 2015 campaign clearly show that each of the parties have a clear idea as to how to speak to and mobilise their own voters.

That may well help them to get their supporters to turn out – but the bigger challenge for each of them could well be engaging with the issues that lie outside their respective comfort zones.

Figure 8. By party: 5 issues that will most influence how people vote



# 5. If it's all about immigration, can we handle the debate?

## A worrying finding in the State of the Nation poll is that few people remain confident that British society can handle the impact of an election debate focused on immigration.

Just a quarter of people (26%) agree that Britain should be confident that we can come through the 2015 election secure that we can have good community relations across our multi-faith and multi-ethnic society.

Around the same number of people (23%) think the tone of debate will harm and damage community relations. At the same time, however, a significant section of the population remain concerned about shutting this conversation down. A further 23% say we will worry too much about the impact of the election debate on community relations and this will unfairly restrict the debate.

More than half the public are directly at loggerheads with each other over whether we talk too much or too little about immigration. A third of people (32%) say they don't think politicians are talking nearly enough about it; while one in five (19%) think it's bad that they're talking too much about immigration.

While some people feel very strongly indeed about immigration, not everyone does. In fact, only UKIP supporters cite immigration as the number one issue determining how they will vote in the election, to a quite striking extent. 35% of Ukippers say that immigration is the most important issue determining how they will vote, compared to just 14% who say Europe – a surprising finding for an explicitly Eurosceptic party. Only 14% of Conservatives cite immigration as their most important issue, with 10% of Labour supporters and 6% of Lib Dems in agreement.

This may explain why people's opinions of UKIP, the party that has done most to keep immigration front-and-centre in voters' minds, are similarly polarised. More than a third of people (38%) say UKIP is a dangerous and divisive party who risk bringing prejudice into debates about immigration. But 29% take the opposite view, describing UKIP as an important new voice who are just saying what most people think. Only one in five (21%) are sat in the middle on Nigel Farage's party, seeing them as mainly mainstream with a right to their view, provided they do more to ensure that candidates don't hold extreme views. So it is clear that UKIP has more work to do if it is to persuade the British public that it seeks to be a party "for all Britain and all Britons, first and second generation as much as every other" as its first elected MP Douglas Carswell argued in his acceptance speech in Clacton.

Yet there is a middle ground in this polarised debate. British Future has long studied public attitudes to immigration. When asked to rate from 0-10 whether immigration is good for Britain, the public splits into three groups. Around a quarter are 'migration sceptics', who hold very negative

Only UKIP supporters cite immigration as the number one issue determining how they will vote in the election

views about immigration and give it a score of 0-2; a similar number are 'migration liberals', who feel very positively about immigration and give it a score of 8-10. Most people, about half the public, fall somewhere between the two. We call them the 'anxious middle': they are worried about the pressures brought by immigration on jobs, public services and the 'Britishness' of their communities; but they recognise the benefits too – for skills needed in our economy, staff for the NHS and the international students that help make our universities some of the best in the world.

Reaching the anxious middle is not only key to getting through the election debate with community relations in good health; for politicians it may be the key to getting themselves elected. Playing to the gallery is fine if you're content with up to 25% of the vote but only those who reach the anxious middle will take their support into the thirties and beyond to victory in constituency races and across the country more broadly.

For the anxious middle, the economy and NHS are more important than immigration, with the economy their number one electoral issue. They think that politicians are talking enough – not too much or too little – about immigration. But it's important to them that we have that debate in a decent way, which doesn't overstep the mark or jeopardise our basic values. Most of the anxious middle (53%) thinks, for example, that Britain has a proud tradition of protecting refugees and that all of the parties debating immigration in this election should commit to uphold that tradition.

Interestingly, our poll suggests a somewhat more positive outlook can also be found among those who are themselves the subject of much of this debate. Migrants - respondents born outside the UK - are more likely than British-born people to think Britain will get through the election with community relations undamaged. More than half of them think we are talking enough, or even too little, about immigration. Non-white respondents, who this year will make up a greater proportion of the electorate than ever before, take a similar view.

When debating immigration at the hustings that means politicians from all sides need to seek to strike the balance, neither dismissing public anxieties, nor stoking them up, but engaging them with constructive ideas about practical responses to how to manage social pressures from immigration fairly, in a way that can secure the economic and social benefits which can result from migration and integration. Parties will come across as authentic when they find their own voice, rather than trying to sound like their political rivals, because their arguments for managing immigration fit with their broader economic and social vision, about how Britain competes in the world, or manages change at work fairly, rather than jarring with it.

Politicians who take the risk of treating the voters as grown-ups could well find they would gain more respect by being clear about when they can't make promises that they will be able to keep than if they just try to avoid the subject entirely, as British Future's detailed research into public attitudes, reported in 'How To Talk About Immigration' has shown.

Britain perhaps need not be a nation so divided over immigration as some fear. But it is a nation that is worried and uncertain – about the pace of change brought by immigration and also about how we as a society will respond to public concern about it in this election year. If our politicians can speak to both of those anxieties at once, they may yet be able to find the common ground.

# 6. How well will UKIP do?

## Nigel Farage's UKIP insurgency will be one of the big features of the election campaign. By-election victories in Clacton and Rochester put the party into the House of Commons. But this creates some significant challenges for the party too.

### Purple-tinted spectacles

Firstly, the by-election victories have sent expectations sky high among UKIP supporters. Most UKIP supporters expect the party to be in government this Spring – and a significant number think that Nigel Farage will be Prime Minister.

If the party were to win four or six seats, that would be an impressive breakthrough for a party which did not come close to winning a seat in 2010. But that could now come as a disappointment to UKIP's own supporters, who are expecting much more than that by the end of May 2015.

A quarter of UKIP supporters predict that Nigel Farage will be Prime Minister in May

Figure 9. UKIP supporters: Who do you think will be Prime Minister?

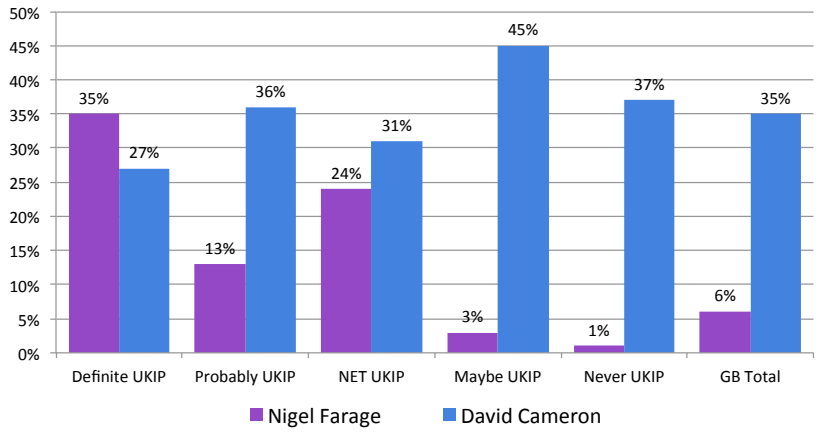
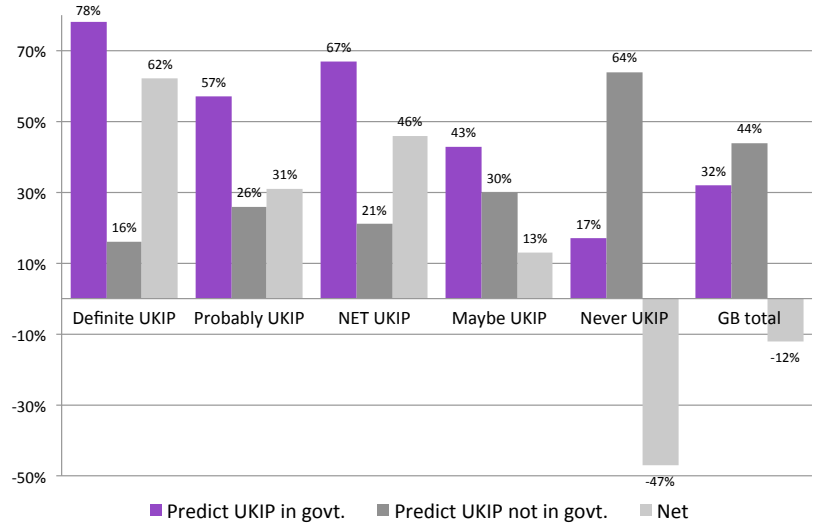



Figure 10. UKIP supporters think their party will be in government



## UKIP if you want to...

Secondly, this highly engaged and mobilised UKIP support could prove double-edged.

The one in ten who will definitely vote UKIP have very different views than the rest of the electorate, and considerably tougher views on immigration than Nigel Farage and the UKIP frontbench themselves.

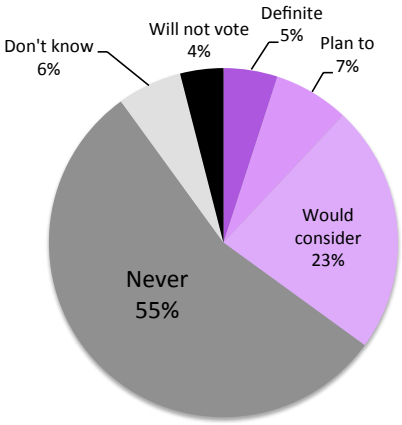
This committed UKIP core is against all immigration – and would cut student migration and skilled migration from inside and outside the EU, and is deeply sceptical about the allegiance and loyalty of British Muslims. However, those who are "UKIP considerers" don't agree on any of those points and instead share the views of the moderate majority that immigration brings pressures to manage as well as benefits to Britain. Parties welcome activism and energy – but the views of its strongest supporters could be a headache for UKIP, for three reasons.

**1.** These strongest supporters may often be among UKIP's most vocal champions, for example, on social media. As ambassadors for the party, they will enthuse others who share their views, but may toxify the party not just among political opponents, but even with some potentially sympathetic voters.

**2.** UKIP has got a long way as a party with a strong appeal to 20% of the electorate who have felt 'left behind' by mainstream parties. These voters will mostly respond strongly to 'party of no' messages, and have little interest in policy scrutiny over whether the tax plans add up.

UKIP will need to reach out to 'moderate majority' votes to seriously compete to win seats in 2015, rather than simply stacking up third and second places around the country. Its chances are higher in tight contests in which three parties have a fair chance – but even then, it may well need to aim for 33% to 40% of the constituency vote. This means that UKIP needs moderate 'anxious middle' voters to switch over to them – 55% of whom currently say they would never vote for the party.

Figure 11. 'Anxious middle' electoral support for UKIP




**3.** Finally, voters who are 'leaning out' of the EU, but are not firmly decided, are considerably more moderate on immigration than the UKIP core. A tough anti-immigration message could repel 'better off out' voters without whom a 50% 'out' vote on Europe is impossible.

While 50% of those who definitely plan to vote 'out' in the event of an EU referendum would like to see UKIP form part of the next government, this falls to 27% among those who are 'leaning out' and 7% among those who are 'leaning in' but not yet decided.

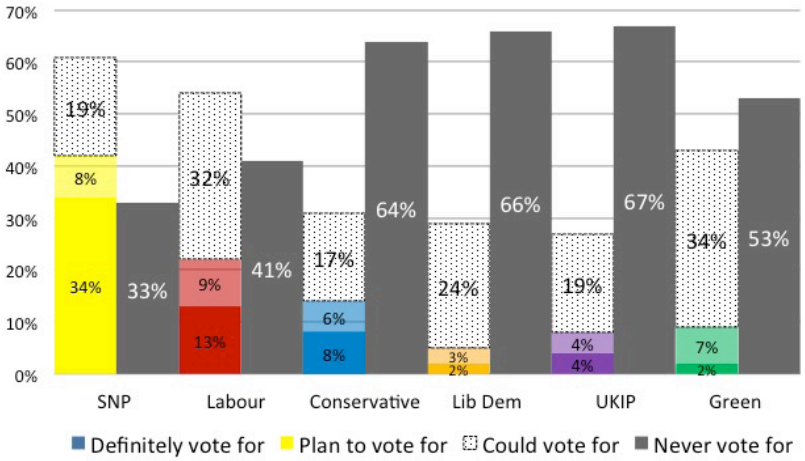
# 7. Will Scotland decide the future of the UK again?

## The General Election in Scotland is probably the least predictable the nation has ever seen – and the contest in the 59 Scottish constituencies could play a significant role in deciding who governs Britain.

The State of the Nation poll highlights the extraordinary achievement of the SNP in capitalising politically on a referendum defeat in which Scottish independence was rejected. Its opponents in Scotland - particularly the Labour party, which was in the process of selecting a leader when the poll was conducted - will hope to improve on their poor showing in this survey by the time the votes are cast in May.

The SNP's current Scottish political ascendancy is not simply about having a strong appeal for those who want independence

Figure 12. Who could the Scots vote for in 2015




Only one in three Scots say that they would never vote SNP. That is a lower score, among Scots, than the proportion who say that of the Conservatives or Labour across Britain – a remarkable achievement for a party that recently sought to dissolve the United Kingdom.

This suggests that the SNP's current Scottish political ascendancy is not simply about having a strong appeal for those who want independence, and the limited competition for that 45% of the electorate. Despite 55% of people rejecting independence, the party can also seek to appeal for the votes of a significant tranche of those who disagree with it on independence, in Holyrood and perhaps increasingly now for seats in Westminster too.

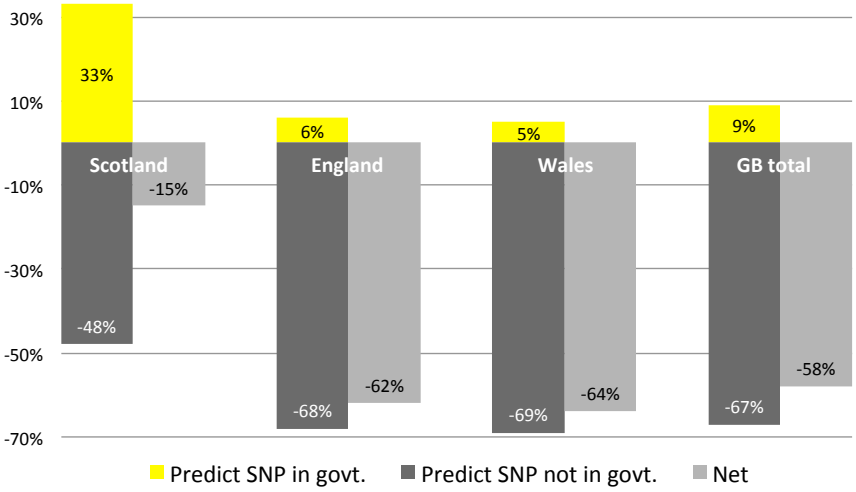
### Could the SNP hold the balance of power?

The SNP has a strong chance of increasing the six seats that it holds, and would aim to surpass its record number of Westminster seats: there were a dozen SNP MPs in 1979, but the party lost 10 seats in the election triggered by its support for Margaret Thatcher's vote of no confidence in

the Labour government.

One third of Scots predict that the SNP will participate in the next government. Voters in England and Wales are much less likely to agree. That is probably an accurate prediction: if the SNP did hold the balance of power, it would be much more likely to use its parliamentary power on an issue-by-issue basis than to take ministerial office in Westminster. The finding, however, may reflect how little the post-independence SNP surge is known outside Scotland, except to those who follow politics most closely.

Figure 13. Will the SNP be part of the next government?




## Who would like the SNP in government?

There is a stark difference in views outside Scotland. This presents an interesting dilemma – or perhaps choice – for the SNP in the event that it does have a significant presence in a hung parliament.

On the one hand, if its negotiating demands are seen as legitimate by many Scots, but viewed with much more suspicion, and less legitimacy, in England and Wales, then this could well, over time, prove corrosive of the legitimacy and purpose of the United Kingdom, and so help to boost the SNP's core mission of Scottish independence.

However, if the SNP does want to show positive results from its strategy of "standing up for Scotland" then it could have a clear interest in shifting perceptions beyond Scotland too. Other parties could well be more constrained, politically, by what deals they can make if SNP demands are perceived to lack legitimacy with voters outside Scotland.

One feature of attitudes towards devolution, which is often overlooked, is that voters across Britain are often in favour of stronger devolution for their own nation in the UK, and are usually then in favour of reciprocal arrangements for the other UK nations too. This is again reflected in the State of the Nation poll; by a margin of more than two to one people believe that a stronger recognition of England would help the UK work as a multi-national state, a view also shared by almost a third of Scottish (28%) and Welsh (32%) respondents.

The SNP's political support for a stronger English and Welsh voice in the Union would probably come as a surprise to most English voters in particular, and may also help to shift sceptical perceptions of the nationalist party's agenda at Westminster. Yet it remains to be seen whether those attitudes would affect how the SNP would use any extra power and influence in Parliament after the General Election.

The State of the Nation results demonstrate the scale of the uphill challenge in the 2015 election faced by Jim Murphy, who was elected as the new leader of Scottish Labour after the polling survey for this report took place.

Scots turn out to be pretty agnostic about a Labour-led government in Westminster, yet are much keener to see both the Conservatives and Liberal Democrats leave power.

29% of respondents in Scotland said that they would like Labour to govern, while 37% would prefer they didn't, and 23% don't mind.

But most Scots are clear that they want both the Conservatives (57%) and Liberal Democrats (54%) to leave office.

And they are split down the middle in terms of predicting what will happen, with 49% of Scottish respondents predicting a Labour-led government and 51% predicting the Conservatives will remain in power. Their own votes may decide whether that happens.

The outcome in the Scottish election in 2015 will depend on whether the SNP can maintain its claim that strengthening the party's presence in Westminster will do most to stand up for Scottish interests, against Labour's argument that it is the only party capable of changing the government in London.

The outcome of that argument could do much to determine how the kaleidoscope of Scottish domestic politics shifts and settles after the historic 2014 referendum vote.

Scots turn out to be pretty agnostic about a Labour-led government in Westminster, yet are much keener to see both the Conservatives and Liberal Democrats leave power

Figure 14. Net scores: Who would you like in government after the General Election?

| Party | Scotland | England | Wales |
|---|---|---|---|
| Labour | -8% | -9% | -10% |
| Conservatives | -36% | -4% | -24% |
| Lib Dems | -45% | -35% | -37% |
| SNP | +9% | -58% | -47% |
| UKIP | -54% | -22% | -33% |
| Greens | -19% | -26% | -34% |
| Plaid Cymru | -35% | -51% | -32% |
| *Sample size* | *401* | *1791* | *93* |

Figure 15. Net scores: Who do you think will be in government after the General Election?

| Party | Scotland | England | Wales |
|---|---|---|---|
| Labour | +19% | +8% | +16% |
| Conservatives | +22% | +31% | +16% |
| Lib Dems | -39% | -38% | -37% |
| SNP | -15% | -63% | -65% |
| UKIP | -29% | -9% | -26% |
| Greens | -61% | -62% | -67% |
| Plaid Cymru | -64% | -69% | -61% |
| *Sample size* | *401* | *1791* | *93* |

## There are more than two nations in the Union

With the politics of the United Kingdom in flux, what impact will that have on Wales and Northern Ireland? Some hope for a deepening of 'home rule all round' if the arguments about the future of devolution could be viewed more holistically.

Welsh First Minister Carwyn Jones has long advocated a UK-wide constitutional convention, and the Institute of Welsh Affairs is running a crowd-sourced constitutional convention to try to get the debate going. But many political observers fear that Wales risks being marginalised in the debate about the future shape of devolution, by intense political competition within Scotland during the campaign.

The State of the Nation poll findings appear to indicate a broad scepticism in Wales about whether the SNP holding the balance of power in Westminster would bring benefits across the UK for the common good, though the small sample of Welsh respondents mean the findings should be treated with caution.

That there has been no similar political earthquake for nationalism in Wales as in Scotland appeared clear from a larger BBC Wales poll in December 2014, which showed Plaid Cymru (12%) trailing UKIP (18%) by a striking margin across Wales, after UKIP had risen 8% over the previous twelve months, mainly at the expense of Labour, though Labour continued to lead the Conservatives by 36% to 23%. Because Plaid Cymru have stronger prospects at a constituency level, currently holding three seats, they could play an important role in Westminster. If the widely unnoticed UKIP rise in Wales is sustained, it could have unpredictable impacts on the outcomes in other marginal seats.

The State of the Nation poll findings appear to indicate a broad scepticism in Wales about whether the SNP holding the balance of power in Westminster would bring benefits across the UK

## The more predictable politics of Northern Ireland

If a hung Parliament results from the counting of the votes on May 7th, then the dynamics of any political negotiations which follow could prove quite different depending on whether the Liberal Democrats or the SNP are the third largest party in the Commons, as well as on whether UKIP has a significant or more minor presence in the new House of Commons.

The year of political uncertainty will have least electoral impact in Northern Ireland, where much more stable patterns of voting, and the demographic make-up mean that there is a clear favourite, and fairly predictable outcome, in 16 of the 18 constituencies.

The province did boast the most marginal seat anywhere in the United Kingdom in 2010, in Fermanagh and Tyrone, with Michelle Gildernew of Sinn Fein winning the seat by just 4 votes, against an independent candidate backed by both large Unionist parties.

Most attention in 2015 will focus on East Belfast, where the DUP deputy leader Nigel Dodds, the party's most senior Westminster politician, has a slender majority of just over 2000 over Sinn Fein.

If Dodds does hold the seat then leading a contingent of eight or nine DUP MPs could well make him the most influential Nigel in Westminster in May 2015, being likely to have more MPs than UKIP's Nigel Farage, and probably being considerably more willing to negotiate a deal in Parliament too.

So if there will be little national attention paid to Northern Ireland during the General Election campaign, the politics of Northern Ireland could become a crucial factor in the "confidence and supply" arrangements which a minority government may depend on, or otherwise in close Parliamentary votes where a government or coalition with a slender majority faces backbench dissent.

It is also possible, in a hung Parliament, to play a crucial role by not turning up. Few have yet noticed that the continued abstention of Sinn Fein's election MPs does move the winning line a little if political leaders are seeking to scramble a de facto majority together to survive a confidence or budget vote.

Sinn Fein holds five seats, and hopes it might make a further gain in May. Five or six MPs who do not take their seats could, in their absence, play a crucial role in the Parliamentary arithmetic. Might Gerry Adams and his colleagues even be tempted to change their minds, and to take an oath to the Queen to take up their seats, if the prize for doing so were to be able to impede or prevent the formation of Her Majesty's government?

# 8. Could the Liberal Democrats survive - and recover?

## There are several sobering findings in the State of the Nation poll for the Liberal Democrats, as the party heads into an election year, trending with only a third of the vote share that it received in 2010.

Given that a larger proportion of the electorate say that they would never vote Lib Dem than say that they would never vote UKIP, Nick Clegg would find it hard to argue that the eurosceptic party are an entirely marginal voice whose concerns can be ignored.

The Lib Dems are not secure in fourth place either: the State of the Nation survey found a very similar level of actual and potential support for both the Green Party and the Lib Dems. And there were, across Britain as a whole, more definite SNP voters than Liberal Democrat supporters who were certain to vote for Nick Clegg's party.

Among the public generally, only one in ten people would like to see the junior Coalition partners return in the next government – though twice as many think it likely that Nick Clegg's party will find itself back in office. Yet Liberal Democrats may find a few glimmers of hope through the gloom.

Firstly, morale remains fairly good among the small band of committed Liberal Democrat supporters. Despite being taunted by opponents with the prospect of electoral Armageddon, over half of those who are certain to vote Lib Dem believe that the party will return to power.

Secondly, the party may still have a broad enough pool of potential supporters to achieve its defensive aims. The key to the Lib Dems' electoral performance will be how far it can defend the seats that it already holds, with incumbent MPs in particular hoping that they can persuade enough voters to back them locally. That 36% of voters say that they could consider voting Liberal Democrat shows they will have a reasonable pool to fish in.

Thirdly, the general public mood towards the Liberal Democrats would be better characterised as indifference rather than loathing. Nick Clegg may have struggled to make Coalition a positive virtue in the British political culture, but four out of ten people wouldn't mind if his party were in government again.

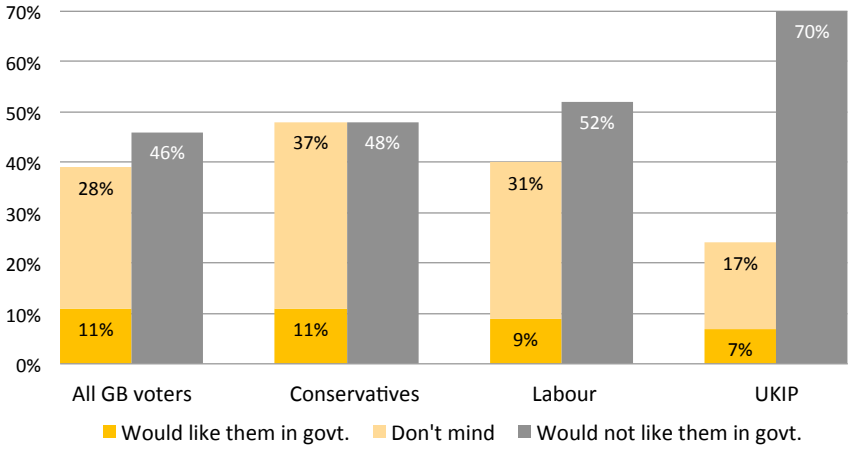
There is also now a broadly 'equidistant' approach to the Liberal Democrats across the political spectrum. Somehow, the impact of this left-leaning centre party having formed a Conservative-led Coalition which is ending considerably more acrimoniously than it began means that there are rather balanced attitudes among both Labour and Conservative voters towards the Lib Dems.

Most would prefer their own parties to govern alone, but the menace with which the more ardent activists of both the red and blue tribes loathe the Lib Dems for their part in the Coalition is not as widely shared as

The menace with which the more ardent activists of both the red and blue tribes loathe the Lib Dems for their part in the Coalition is not as widely shared as many think

many think.

Figure 16. Would people have the Liberal Democrats in government again?

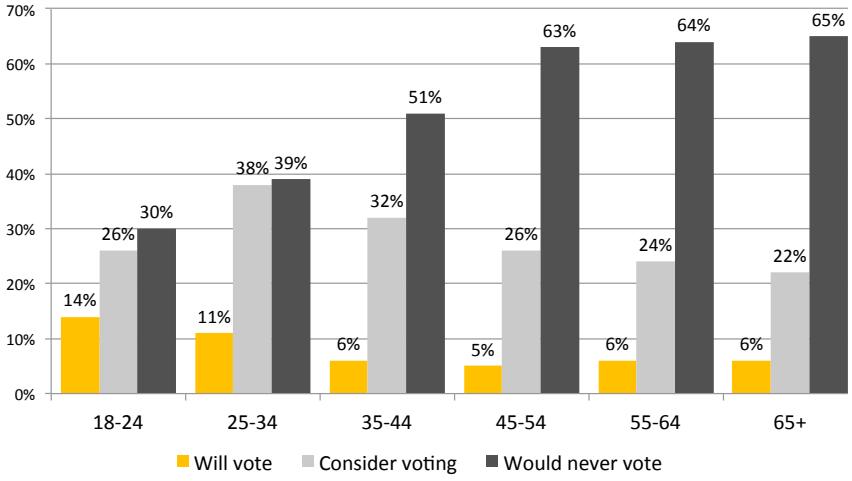



In the State of the Nation poll, first time voters (14%), ethnic minority respondents (15%) and those born abroad (12%) were more likely to say they plan to vote Lib Dem in 2015.

In the longer-term, the State of the Nation survey shows that the Liberal Democrats would need to rebuild support among younger Britons, who hold more liberal views.

Younger Britons are still more likely to consider voting yellow than their parents or grandparents

Figure 17. Liberal Democrat support by age demographic



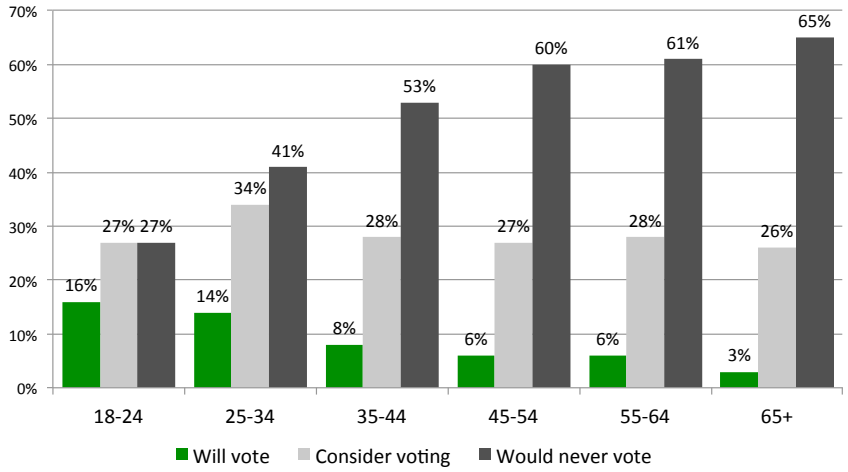

The Lib Dems have paid a large political price for the controversial U-turn on the university tuition fees pledge made at the last election. But younger Britons are still more likely to consider voting yellow than their parents or grandparents. In 2015, however, the Green Party may well seem a more straightforward expressive vote. The more challenging task for the Liberal Democrats is to make the case that a party prepared to make compromises in power can be an effective champion of liberal values.

## Could the Greens beat the yellows?

Although UKIP are the party likely to make the largest gains in May, there are also positive signs for the Green Party. Eight per cent of people say they will vote for the Greens, the same number as the Liberal Democrats. Almost a third of people say they would consider voting for the Greens

- again, the same as the Lib Dems. Considering that only 10% of people rate the environment as one of their top 5 issues this is a positive result for the environmental party. Although falling well below UKIP as an outsider party, in some constituencies they could be in a position to benefit from the protest votes of those on the left of the political spectrum.

Figure 18. Green Party potential support by age demographic



# 9. Beyond the election - the future majority challenge

## Neither major party will have given up hope of sneaking across the 326-seat line for a Commons majority in 2015. The chances of a strong working majority, however - still less the types of thumping victories won in successive elections by both Margaret Thatcher and Tony Blair in the 1980s and from the 1990s - now seem a distant memory for both sides.

Specific short-term factors have doubtless contributed, from tough economic conditions to the reputations of individual political leaders. But this also reflects how the two big political tribes have been in long-term decline across the post-war period. Their joint share has fallen from a duopoly of 97% in the 1950s, to three-quarters of the vote from the mid-1970s to the late 1990s, and then again to a joint share of just two-thirds in the elections of both 2005 and 2010.

It is very likely that the two biggest parties will again, between them, still command the allegiance of a majority of voters in 2015. Yet each now feels itself to be a long way short of winning the 40% vote share that had long been considered the benchmark for a decent Commons majority.

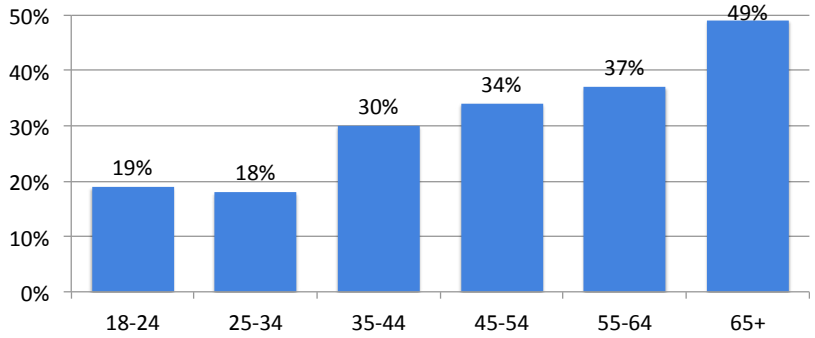
While their precise comparative standing in the pre-election polls will doubtless fluctuate over the weeks and months ahead, the State of the Nation survey captures a snapshot which can illuminate the longer-term challenges that either of the two big political tribes face if they are to broaden their appeal. Indeed, any alternative political formation that was to make a serious effort at a majority appeal would face similar challenges.

### The Conservatives

The Conservative Party will go to the polls aware that it has not won an overall majority for nearly a quarter of a century; since John Major's comeback victory in 1992 in a Britain with a significantly different demographic to that which will go to the polls in 2015.

Only those aged over 40 today took part in that 1992 election - and there is a sharp age gradient in those who hope to see the Conservatives govern in 2015.

Figure 19. By age: "I would like to see the Conservative party in government"



The State of the Nation findings confirm that, if the Conservative party is to extend its appeal, it needs to head north of the Watford gap, speak to younger voters and compete seriously for a decent share of ethnic minority votes.

There has been a marked increase since 2010 in awareness of the importance of the party's ethnic minority challenge. While non-white voters are considerably more likely to vote Labour, the fact that ethnic minority voters are no more likely than white voters to say that they would "never" vote Conservative suggests that party strategists are right to consider that this is one of the most significant pools of potential new support.

Who says they would "never" vote Conservative?

42% of white voters
41% of non-white voters
34% of those born abroad

37% of AB voters
53% of DE voters

34% of southern voters
37% of voters in the Midlands
46% of northern voters
64% of Scottish voters

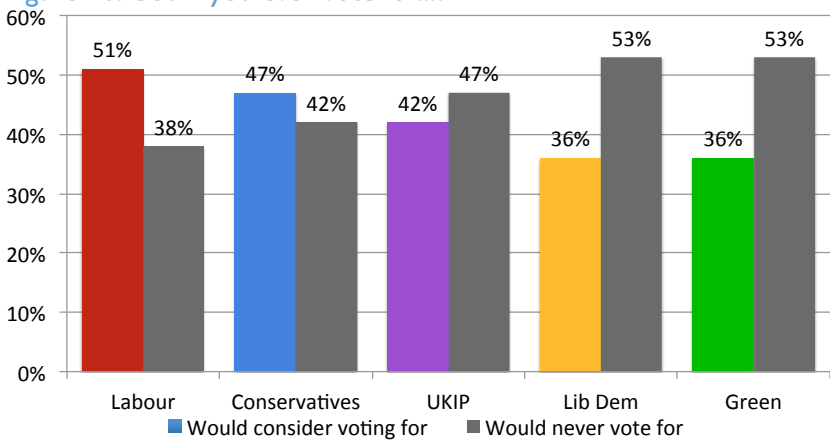
If the Conservative party is to extend its appeal, it needs to head north of the Watford gap, speak to younger voters and compete seriously for a decent share of ethnic minority votes

The party's challenge after 2015 will be how it can, in practice, find a way to break the now-repeated pattern whereby the aspiration to build long-term outreach across ethnic, regional and class boundaries, articulated in the first half of a Parliament, has tended to be overshadowed and to get lost as each election nears, because the difficulty of making rapid immediate gains sees the party's strategic long-term interests sacrificed for short-term tactical efforts to mobilise the voters whom the party already knows best.

## Labour

The Labour party has struggled to articulate a clear sense of purpose or identity since the mid-2000s, whether in government or in opposition. Although Labour retains one potentially significant advantage in the party competition: the State of the Nation poll shows that it is the only party that a majority of voters could at least imagine themselves voting for.

Figure 20. Could you ever vote for...?



But a potentially broad appeal brings its own challenges, which help to explain the party's struggle for definition. To win, Labour would need to resonate with voters with differing instincts about cultural and social change.

The party's internal debates about this challenge have often quickly descended into caricature, of whether it wants to be a party of latte-sipping liberal graduates or the tribune of the northern working classes. Any party asking which voters it doesn't want to represent may find itself pitching too narrowly to govern.

The Labour vote is now a good deal more socially liberal on cultural issues, like identity and immigration, than it was in 2005. This reflects generational change: its traditional strong support among ethnic minorities means it is doing well among this growing section of the electorate. It is also because political changes since 2010 have seen Labour attract some liberal votes from anti-Coalition Lib Dems, while losing some migration sceptic voters to UKIP.

Yet Labour's vote also remains significantly divided on cultural issues. For example, it is split into three almost-equal segments when asked whether politicians talk about immigration too much, too little or have got it right now.

Figure 21. Do Labour supporters think we're talking too much or too little about immigration?

| | Politicians are now talking too much about immigration | Politicians are talking enough about immigration now | Politicians are still not talking enough about immigration |
|---|---|---|---|
| Labour voters | 29% | 33% | 26% |
| All voters | 19% | 36% | 32% |

The majority of the party's voters, however, are among what British Future has termed the 'anxious middle': those who see migration as bringing both pressures and benefits, rather than taking an entirely 'pro' or 'anti' migration view. Whether it were to win narrowly or to fall short, Labour's ability to find its own voice on issues of identity and culture will need to be an important part of its long-term thinking beyond the 2015 election.

Figure 22. Labour and the 'anxious middle'

| | Migration liberals | Anxious middle | Anti-migration |
|---|---|---|---|
| GB total | 18% | 51% | 27% |
| Definite Labour | 34% | 44% | 21% |
| Probable Labour | 24% | 54% | 20% |
| Would consider voting Labour | 18% | 57% | 22% |
| Would never vote Labour | 10% | 52% | 36% |

There will be no broad-enough electoral coalition in national elections in the foreseeable future without the major parties finding a platform that can transcend these differences, and find an effective politics to appeal to those who are both optimistic about change and anxious about it.

# 10. The EU: Is Britain going to make its mind up?

## Whether or not we stay in the EU could well be the biggest decision made during the next Parliament.

2015 is unlikely to be the year of decision – but whether there will be a referendum soon, and when it might be likely to take place, may well become clear once the next government is formed.

The State of the Nation poll shows that the British are sceptical about the European Union – but far from sure about leaving the club. Most people have yet to make up their minds, nor have even given the issue much thought.

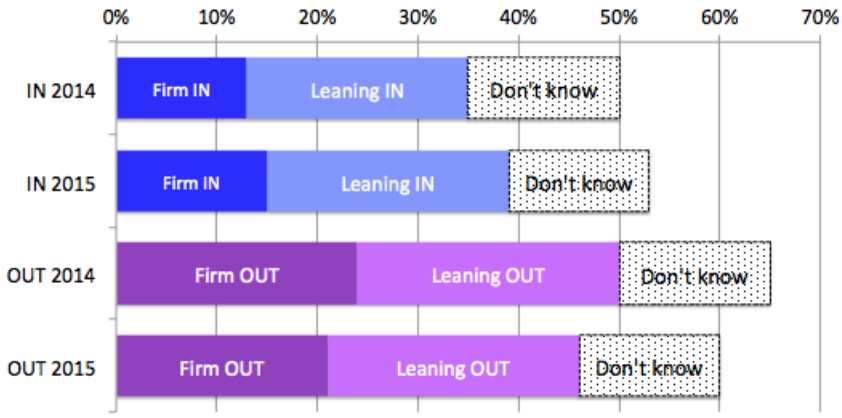
2014 was a dramatic year in the politics of Britain's EU debate. Several significant developments saw Europe often on the front pages. The year began with controversy over the opening up of free movement to Romania and Bulgaria; UKIP topped the poll in the European Elections; a new European Commission took office, as the British government fell out with its EU partners over the appointment of Jean Claude-Juncker and over the EU budget too; and David Cameron set out his proposals to reform EU free movement.

The overall effect of these events on views about Britain's place in the European Union appears to have been pretty minimal. The State of the Nation poll finds that views about whether Britain should be in or out of the EU are similar to those in a 2013 ICM poll for British Future, exactly one year earlier. The public is leaning more 'out' than 'in', with a slight narrowing of the gap between the two polls, from 13 points to 7 points.

It may be significant that two-thirds of Conservatives (65%) say that the terms and conditions of membership will be important to making up their mind about in or out – a higher proportion than for Labour (48%), Liberal Democrat (47%) or UKIP (38%) voters.

Most people are a long way from making up their minds - only just over a third of the electorate are sure about how they would vote on a referendum

Figure 23. Attitudes to EU membership: tracking opinion over the last year




Firstly, most people are a long way from making up their minds. Only just over a third of the electorate are sure about how they would vote on a referendum. There are committed minorities on both sides of the debate

– but most people have not given the issue much thought yet.

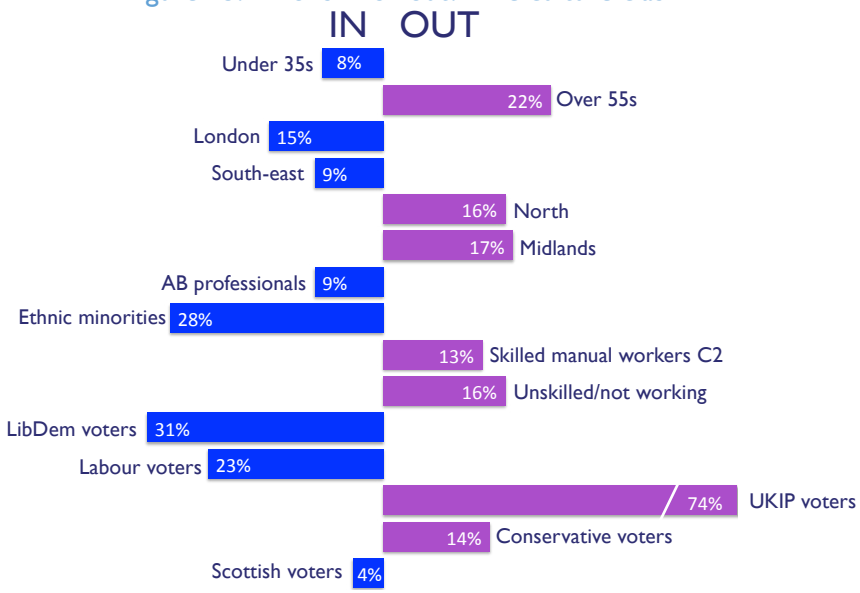
Figure 24. Who has made their mind up on EU membership? And who hasn't?

| | All | Out | In |
|---|---|---|---|
| Committed | 36% | 21% | 15% |
| Wavering - depends on terms | 49% | 25% | 24% |
| Don't know | 14% | - | - |

What is clear is that any future referendum on the EU will be decided by those for whom the EU is not an especially big issue, and who aren't sure which side has the stronger case.

What the 'in' and 'out' responses do capture at this stage is a clear sociological divide - in terms of age, class and region - over the comparative advantages of Britain choosing to stay or leave.

Figure 25. Who is in or out?* The culture clash

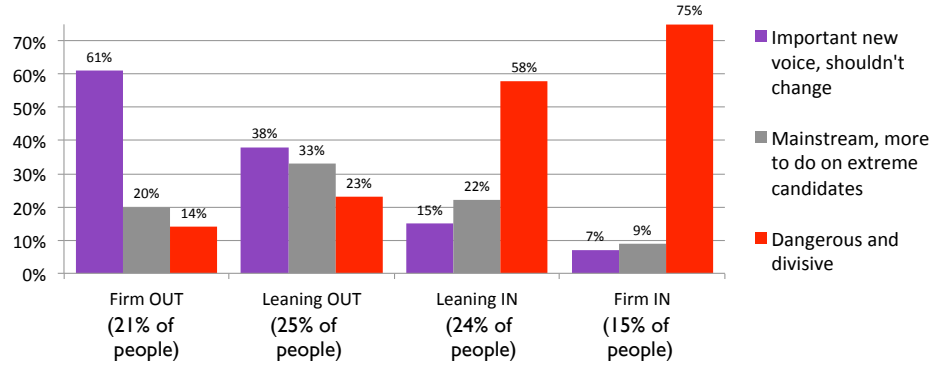



* by net support for voting 'in' or 'out' in a referendum on EU membership

Culture and identity will matter in the EU debate – but both sides are much more confident when talking to those who already agree with them than when trying to engage with those who are undecided.

The 'Farage paradox' is that the rise of UKIP has enthused and mobilised staunchly anti-EU opinion but appears to have done little or nothing to expand support for leaving the EU, and instead risks putting a ceiling upon it. With only 50% of people believing that UKIP is either mainstream - but with more to do on extreme candidates - or already an important new voice in British politics, any 'out' campaign would need to tackle the possible toxification of the eurosceptic cause by it's most public champion. While 38% of people overall feel that UKIP is a dangerous and divisive party, this rises to 58% of those who would consider voting to stay in the EU but are not 100% decided. The 'out' campaign therefore, would have a significant mountain to climb in persuading the undecideds to vote with them by virtue of the company that the 'out' campaign keeps, and its perception amongst these voters.

Figure 26. By attitude to EU membership: How is UKIP perceived?




The phenomenon of the 'Farage paradox' is matched, however, by a similar phenomenon of public interventions from Brussels seeming to more often boost the 'out' cause than the case for British membership.

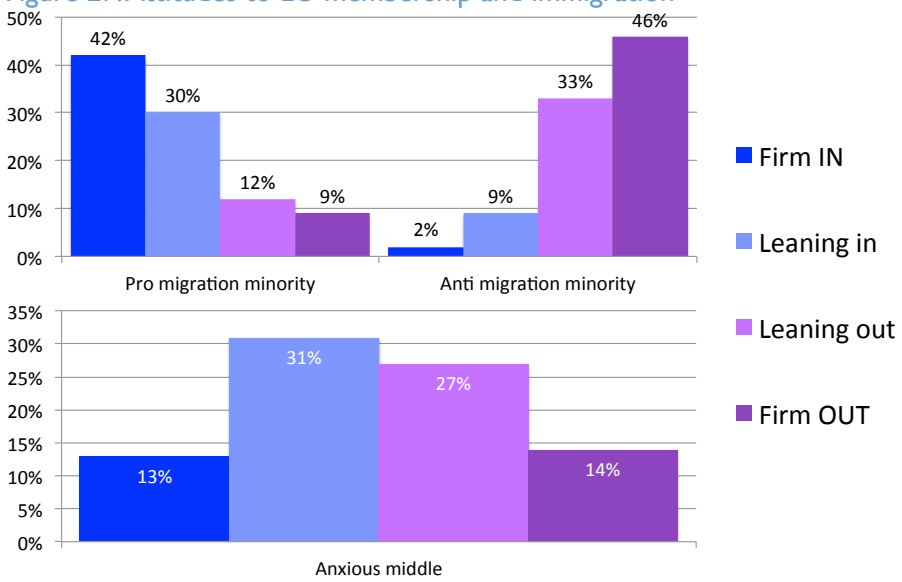
This has given the early skirmishes in the battle over Britain's EU membership a curious feature: it is like watching a Champions League match in which all of the scoring is through own goals.

The 'out' side faces significant challenges in persuading younger, more affluent and more metropolitan voters - both that it has a proper, real-world plan for exit, and that it is confident and at home in modern Britain, rather than seeking to turn the clocks back to a bygone era. The 'in' side struggles to understand culture and identity, and in particular struggles on immigration.

Yet attitudes towards immigration are a very strong predictor of people's views on EU membership. Pro-migration liberals, who make up roughly 18% of the population are firmly pro-EU, while the quarter (27%) who form Britain's anti-migration minority are staunchly anti-EU. The majority of the population (51%), however, are far less polarised when it comes to the immigration debate. This 'anxious middle' are equally unsure about where they stand on the question of Europe.

If the EU referendum were to be lost by those who want to stay in, then it will almost certainly be because of immigration

Figure 27. Attitudes to EU membership and immigration




If the EU referendum were to be lost by those who want to stay in, then it will almost certainly be because of immigration. However, the case for free movement most often put forward by pro-EU voices is doing very little to connect with anybody beyond the liberal minority who are already firmly committed to the EU.

The State of the Nation poll casts some important light on this disconnect. Most people who are firmly pro-EU wish the immigration debate would go away. They are discomfited by debates about immigration – and would like politicians to talk less about it. It is an instinct that leaves pro-EU voices struggling to understand or engage the crucial 'leaning out' group and helps to explain why pro-EU voices struggle to engage with the concerns of the undecided without appearing to simply dismiss them as misinformed and wrong.

Figure 28. By attitude to EU membership: "Politicians are now talking too much about immigration"

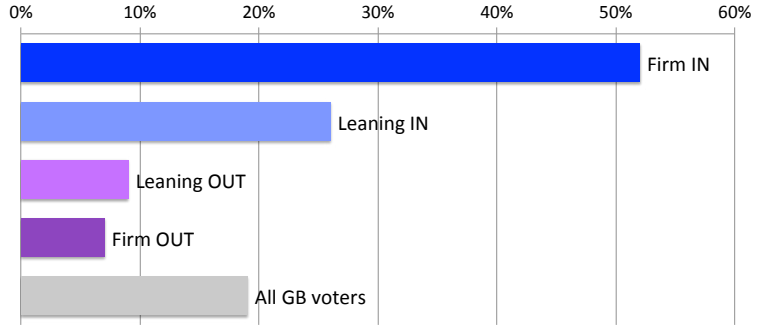



Figure 29. By attitude to EU membership: Are politicians talking too much or too little about immigration?

| | Politicians are now talking too much about immigration | Politicians are talking enough about immigration now | Politicians are still not talking enough about immigration |
|---|---|---|---|
| Firm IN | 52% | 28% | 11% |
| Leaning IN | 26% | 47% | 20% |
| Leaning OUT | 9% | 43% | 41% |
| Firm OUT | 7% | 29% | 58% |
| All GB voters | 19% | 36% | 32% |

Finally, there is the intriguing possibility that the next Parliament will see the tale of two Unions become intertwined, as the future of the UK itself and of our place in the EU feature heavily on the political agenda. A vote to leave the European Union would promote a significant political crisis for the UK, and significantly boost the chances of Scottish independence. That could create significant cognitive dissonance for those who are pro-UK and want Scotland to stay, yet are anti-Europe and in favour of an EU exit.

If it proves very difficult to get the United Kingdom out of Europe intact, the prize that may actually be on offer could turn out to be getting England, alone, or some combination of three UK nations, out of the EU.

# 11. A decade after 7/7, where is the Muslim integration debate headed?

## The 7th of July 2015 marks the tenth anniversary of the 7/7 bombings in London, the worst terrorist atrocity in Britain since the 1988 Lockerbie bombing.

Ten years on from the terrorist attacks in London questions about the radicalisation of young British Muslims have been raised again after stories emerged of British citizens travelling to Syria and Iraq to join the so-called Islamic State (IS) group in 2014.

When the State of the Nation 2015 poll asked respondents whether most British Muslims oppose the extremism and violence of IS, 58% of people agree that they do, while 13% disagree.

That finding can perhaps be taken as a measure of 'glass half-full' reassurance, as an indicator of a bedrock resilience in British attitudes towards the multi-faith and multi-ethnic society that we have become.

However, that might be a cautious welcome. Only a quarter of respondents 'strongly agree' with the statement, so this is something that many people 'tend to agree' with. And the bar here is set fairly low: whether people think that most of the nearly 3 million Muslims in Britain oppose a group as extreme as IS.

Perhaps some respondents may reasonably feel that they do not have sufficient personal knowledge or information to offer any clear view on what most British Muslims think. However, active disagreement with the statement suggests, at best, a highly sceptical take on the views of British Muslim fellow citizens.

The 13% who disagree are fairly evenly distributed across society – variations across all regions, social classes and age cohorts remain less than 5%. Men (17%) are more likely to take this view than women (9%), and ethnic minority respondents (8%) less likely than their white British fellow citizens (13%).

The only significant differentiator is politics – particularly views of immigration, Europe and tendency to support UKIP.

UKIP voters do, on balance, agree that most British Muslims oppose ISIS. But they are twice as likely to disagree with the statement compared to most Britons. There is little difference between the views of the other parties' supporters.

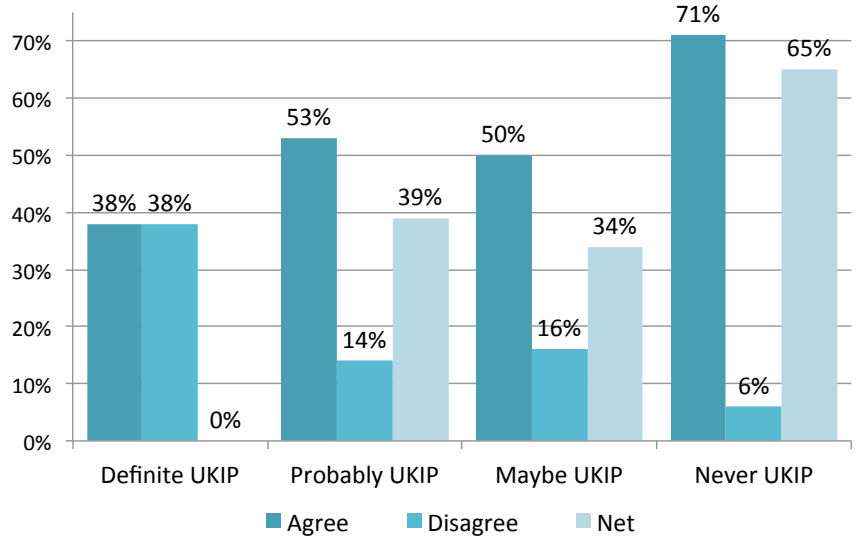
This 'glass half-full' finding suggests some bedrock resilience in British attitudes towards our multi-faith and multi-ethnic society

Figure 30. By party support: "Most Muslims in Britain oppose the extremism and violence of the IS"

| | Agree | Disagree | Net |
|---|---|---|---|
| Conservative | 66% | 12% | +54 |
| Labour | 61% | 11% | +50 |
| Lib Dem | 64% | 6% | +58 |
| UKIP | 46% | 26% | +20 |

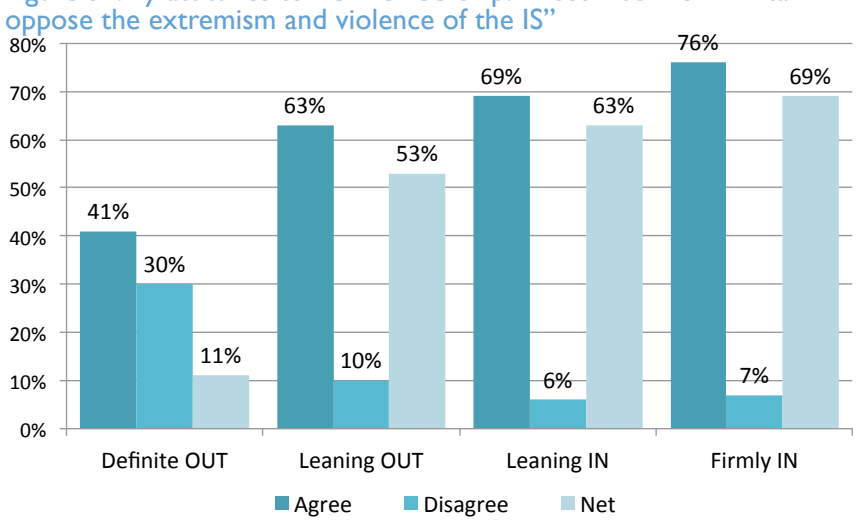
However, what really makes a difference is the strength of identification with UKIP. The real distinction is between the most committed 10% of the UKIP vote and others who are considering UKIP, who hold views that are much closer to those of the other parties.

Figure 31. By support for UKIP: "Most Muslims in Britain oppose the extremism and violence of the IS"




Similarly, attitudes towards the EU are a strong predictor of scepticism towards Muslims, but it is only the 'definite out' group which is distinctive, while the 'leaning out' group resembles median public attitudes.

Figure 32. By attitudes to EU membership: "Most Muslims in Britain oppose the extremism and violence of the IS"




A couple of conclusions might be drawn from this.

Firstly, this helps to exemplify why campaigns against Islam are unlikely to form any significant part of the national party campaigns in 2015. The form which even populist politics takes in Britain is distinct, on this issue, from several other European countries, including the Netherlands, Denmark and France, where politicians from both populist and more established parties have made issues such as Halal meat a significant focus of political campaigns. Seeking to emulate this in Britain would have limited impact. One would struggle, for example, to imagine the recent anti-Islam Pegida marches in Germany that have drawn crowds of up

to 25,000, being replicated here in the UK. Hope Not Hate's research reports that far right groups like the EDL and the BNP are at their weakest for two decades. There are certainly important public concerns about integration, but explicitly anti-Muslim campaigning could well be both contentious and unpopular. Such campaigns could, however, be more common at a local level and it will be important for civic groups to be vigilant about this.

It is much too early to predict what impact the Paris murders of January 9th will have on integration debates around Europe.

The public mood in France was strongly for unity – reflected in the warm and peaceful rallies across the country.

Nigel Farage's political rivals criticised his language about a "fifth column" in British society, with Home Secretary Theresa May describing the language as "irresponsible".

The State of the Nation findings show why the idea of a fifth column will have resonated with UKIP's strongest supporters, but also suggest that it would not be in UKIP's interests to stoke-up issues of Muslim integration. Beyond principled objections about the risks of doing so, it is also clear that this would be more likely to narrow the party's appeal than to extend it.

Farage also wrote about his commitment to "actively support and rally behind the people who are leading the charge against radical Islam, especially those in Britain's Muslim communities", but civic Muslim voices involved in anti-extremism work felt his language risked making that work harder.

"Nobody should be in denial about the real challenges we face, but using language like 'fifth column' overheats and polarizes the debate in an unhelpful way. It is bound to spark headlines which can be seized upon and twisted by those seeking to spread a 'them and us' agenda of grievance and radicalization among young vulnerable men", said Dilwar Hussain, of the New Horizons in British Islam group.

Other voices in UKIP, particularly Communities spokesman Ajmad Bashir, have struck a more constructive and nuanced tone in discussing British Muslim identity and integration. It would make an important difference if more of his party colleagues were to join him in this. The State of the Nation findings also suggest that UKIP may be one of the few institutions or voices trusted by the hard-to-reach groups that are very sceptical of Muslims, including those who hold prejudiced views against Muslims.

In the heat of an election campaign, some may exacerbate and stoke up prejudices, but UKIP candidates could also take an intelligent risk by deliberately confronting prejudiced views. Candidates from any party that sincerely wants to promote integration would further this cause by taking a strong stance against prejudice.

# 12. Scotland and the Union - how long before a sequel?

## Did the Scottish independence referendum of 2014 settle the question?

'Yes and no agree it's a once-in-a-lifetime vote' read newspaper headlines on the eve of the Scottish independence referendum in September 2014, reflecting the Edinburgh agreement's conditions that the result was considered decisive by all parties. That seems rather less likely now, given the way in which the Scottish National Party have turned the disappointment of the referendum result into a nationalist surge.

One in four people think Scotland will be independent within a decade – but that rises to 48% of Scottish respondents to the State of the Nation poll.

Two-thirds of Scottish respondents believe that Scotland will become an independent country within half a century – while only 17% are confident that will never happen. A minority of English and Welsh respondents agree: 24% in England think Scotland will be independent within a decade, and 44% that Scotland will become independent within half a century.

It is not clear when the question of independence will be put again – but that could become one of the big political questions during the second half of 2015. After the General Election results are known, the question of whether or not the SNP will pledge a second referendum in their 2016 manifesto for the Holyrood elections could well be a dominant focus in Scottish politics.

Scottish First Minister Nicola Sturgeon has said that a decision will not be made about this in the Autumn of 2015, which kicks the question beyond the election, but makes it the key question of the 2015 party conference season.

Politics north of the border is currently taking the form of a permanent campaign, with the September 2014 referendum being followed by the most intensely fought Scottish Westminster campaign that anybody can remember, with little time to catch anybody's breath before the May 2016 Holyrood rematch to elect a Scottish government.

Should the SNP make a referendum pledge in the Scottish campaign, and win a Holyrood majority, it could well prove difficult for Westminster to refuse, despite the Edinburgh agreement.

There is clearly a high and sustained appetite for politics in Scotland, demonstrated by the 84% turnout in the referendum, but that may not extend to wanting to do it all again so quickly.

Holding a referendum within five years would be an enormous risk for Scottish nationalists. There would be little time to hold any serious inquest into why No won a majority in 2014, and little chance of making a significantly different case for independence. Despite the energy of the 2014 campaign, the Yes campaign did not persuade Scots of the economic case for independence. Recasting an approach to the economy, currency and oil will not be an easy task, and will take two or three years. So a "one more heave" approach to trying to secure independence with a similar

It is not clear when the question of independence will be put again – but that could become one of the big political questions during the second half of 2015

campaign could well lead to a similar result.

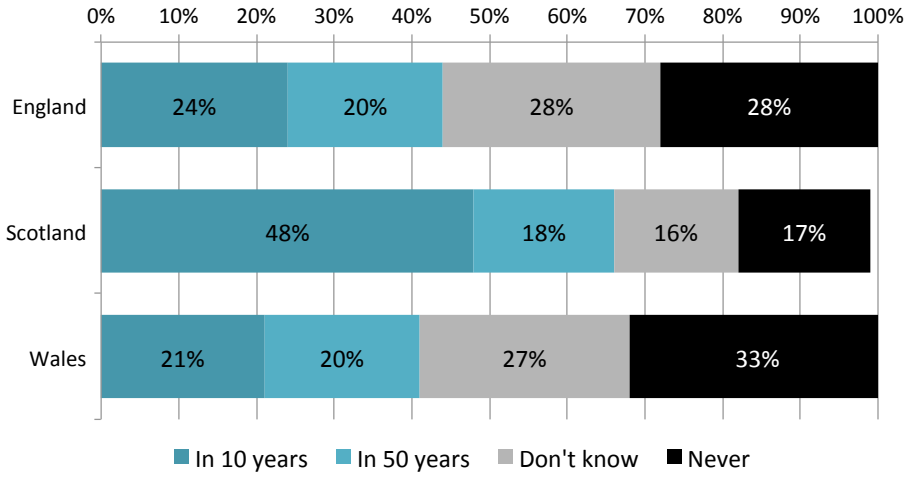
However, the new members who have quadrupled the ranks of the SNP to over 100,000 members since the referendum may be loath to give up a renewed bid to make Scotland independent.

The Holyrood system of proportional representation makes it difficult to secure a majority. If no attempt is made to hold another vote during an SNP third term in office, there can be no guarantees as to when the opportunity would arise again.

Events, particularly the uncertain outcome of an EU referendum, could yet prove a game-changer in Scotland too. But, until there is a change of that magnitude, which voters did not know about when they made their 2014 choice, the strategic case for caution may well prevail within SNP ranks this Autumn.

Asking the question a second time and losing could put independence beyond reach for a lifetime after all.

Figure 33. Will Scotland be an independent country?



# Notes and tables

## Notes

Polling for this report was by ICM Unlimited for British Future. ICM Unlimited surveyed a representative sample of 2,285 adults aged 18+ in GB online between 28-30 November 2014. Surveys were conducted across the country and the results have been weighted to the profile of all adults. The number of interviews with respondents in Scotland was boosted to 400 to give more representative results. ICM Unlimited is a member of the British Polling Council and abides by its rules. Further information at www.icmresearch.com.

Percentages do not always add up to 100 due to rounding.

## Tables

Question 1. In May next year we will be having a general election. Who do you think will be Prime Minister after the 2015 general election?

| David Cameron | Ed Miliband | Nick Clegg | Nigel Farage | Boris Johnson | Theresa May | Yvette Cooper | Don't know |
|---|---|---|---|---|---|---|---|
| 35% | 21% | 1% | 6% | 3% | *% | 1% | 30% |

*See 'Figure 3' (page 8) for breaks by party.*

Question 2. Some people have said they would not vote in a new General Election, while others have said they would vote. I would like to know how certain it is that you would actually vote in the 2015 general election?

| Certain to vote (10) | Possible voters (7-9) | Unlikely to vote (2-5) | Certain not to vote (1) | Don't know |
|---|---|---|---|---|
| 60% | 24% | 8% | 4% | 3% |

*See 'Figure 4' (page 9) for breaks by age.*

Question 3. The Conservatives, Labour, the Liberal Democrats and other parties would fight a new election in your area. Which party do you think you will vote for in the 2015 general election?

| | I will definitely be voting for this party | I plan to vote for this party (but not 100% decided) | I would consider voting for this party | I would never vote for this party |
|---|---|---|---|---|
| Conservatives | 16% | 11% | 20% | 42% |
| Labour | 17% | 10% | 24% | 38% |
| Lib Dems | 3% | 5% | 28% | 53% |
| UKIP | 10% | 10% | 22% | 47% |
| SNP | 4% | 2% | 9% | 75% |
| Green | 3% | 6% | 28% | 53% |
| Plaid Cymru | 1% | 2% | 9% | 78% |
| Other | 1% | 2% | 13% | 73% |

*See 'Figure 6' (page 10) for 'never vote for' breaks by age.; See 'Figure 17' (page 23) for Lib Dem break by age; See 'Figure 18' (page 24) for Green Party break by age; See 'Figure 20' (page 26).*

Question 4. After the General Election, there may be a single party government or another Coalition. For each of the parties, please say whether you would like them to be in government, or not after the election.

| | I would like this party to be part of the government after the election | I would not like this party to be part of the government after the election | I don't mind if this party is part of the government or not | Don't know |
|---|---|---|---|---|
| Conservatives | 32% | 40% | 14% | 14% |
| Labour | 30% | 39% | 17% | 14% |
| UKIP | 20% | 46% | 18% | 15% |
| Lib Dem | 11% | 46% | 28% | 15% |

*See 'Figure 1' (page 6); See 'Figure 19' (page 25) for Conservative break by age.*

Question 5. For each of the parties, whatever your view of them, please say whether or not you think they are more likely to be in government or not.

| | I think this party is more likely to be part of the government | I think this party is unlikely to be part of the government | Don't know |
|---|---|---|---|
| Conservatives | 54% | 25% | 21% |
| Labour | 43% | 33% | 23% |
| UKIP | 32% | 44% | 25% |
| Lib Dem | 19% | 57% | 24% |
| SNP | 9% | 67% | 25% |
| Green | 7% | 69% | 24% |
| Plaid Cymru | 3% | 71% | 26% |

*See 'Figure 2' (page 7); See 'Figure 9' (page 15) for UKIP breaks; See 'Figure 13' (page 18) for SNP breaks by region; See 'Figure 16' (page 23) for Liberal Democrat break by party support.*

Question 6. From the list below, please rank the top 5 issues that will most influence how you vote in the 2015 general election.

| | % who selected issue |
|---|---|
| Best policies on NHS | 52% |
| Best policies on immigration | 47% |
| Best policies on the economy | 46% |
| Best policies on pensions & benefits | 33% |
| Best policies on Europe | 32% |
| Best policies on living standards | 29% |
| Best policies on poverty & inequality | 26% |
| Best policies on taxation | 26% |
| Their world view is closest to mine | 24% |
| Best policies on crime and law & order | 24% |
| Best policies on unemployment | 23% |

| | |
|---|---|
| Best policies on education | 19% |
| Best party leader | 17% |
| Best of a bad bunch | 15% |
| Best policies on housing | 13% |
| Best policies on the environment | 10% |
| It's who or my family have always supported | 9% |
| To send a message | 6% |
| Something else | 3% |
| Don't know | 7% |

*See 'Figure 5' (page 10) for breaks by age; See 'Figure 7' (page 11) for Immigration and Europe breaks by party support.*

Question 7. On a scale of 0 to 10, where 10 means you think immigration into Britain is an entirely positive thing, and 0 means you think immigration into Britain is an entirely negative thing, how would you describe your views towards immigration?

| Migration liberals (8-10) | Anxious middle (3-7) | Migration opponents (0-2) | Don't know |
|---|---|---|---|
| 18% | 51% | 27% | 4% |

*See 'Figure 22' (page 27) for break by support for Labour.*

Question 8. Immigration is likely to be an important topic in the 2015 general election debate. Which of the following statements comes closest to your own view of the impact of that debate on British society?

| | % who agree with statement |
|---|---|
| I think Britain should be confident that we can come through the 2015 election campaign secure that we can have good community relations across our multi-faith and multi-ethnic society | 26% |
| I think Britain will be damaged by the 2015 election campaign, because the tone of the debate will harm and damage community relations within our society of different faiths and ethnicities | 23% |
| I think we will worry too much about the impact of the 2015 election campaign on community relations and this will unfairly restrict the debate | 23% |
| None of these | 10% |
| Don't know | 19% |

Question 9. Immigration, and how different parties would handle it, is again likely to be one of the key topics for debate in the run-up to the 2015 election. Which of the following statements comes closest to your view.

| | % who agree with statement |
|---|---|
| I think it's good that politicians are now talking enough about immigration: the election debate should be about who has constructive answers to the challenge we face | 36% |
| I don't think politicians are yet talking nearly enough about immigration: we need a much stronger approach if we are going to get to grips with the issue | 32% |
| I think its bad that politicians are talking too much about immigration: this is now taking up too much attention that would be better used for other issues | 19% |
| None of these | 4% |
| Don't know | 10% |

*See 'Figure 21' (page 27) for Labour breaks; See 'Figure 28' and 'Figure 29' (page 31) for break by attitude to EU membership.*

Question 10. To what extent do you agree or disagree with the statement: "Britain has a proud record of protecting refugees and as parties debate immigration in the 2015 election, they should all agree to uphold that tradition."

| Strongly agree | Tend to agree | Neither agree nor disagree | Tend to disagree | Strongly disagree | Don't know |
|---|---|---|---|---|---|
| 16% | 29% | 25% | 13% | 10% | 6% |

Question 11. The United Kingdom Independence Party (UKIP) looks set to contest more seats in the general election this year. Some have seen the party's focus on immigration and Europe as controversial. Which of the following statements comes closest to your view of UKIP?

| | % who agree with statement |
|---|---|
| I see UKIP as mainly a dangerous and divisive party who risk bringing prejudice into debates about immigration. | 38% |
| I see UKIP are an important new voice who are just saying what most people think, and they should not change their approach even if some people think it goes too far | 29% |
| I see UKIP as mainly a mainstream party with a right to their view, but I think they need to do more to make sure they don't have candidates with extreme views | 21% |
| Don't know | 9% |
| None of these | 4% |

*See 'Figure 26' (page 30) for break by attitude to EU membership.*

Question 12. To what extent do you agree or disagree with the following statement: "Most Muslims in Britain oppose the extremism and violence of IS (Islamic State)."

| Strongly agree | Tend to agree | Neither agree nor disagree | Tend to disagree | Strongly disagree | Don't know |
|---|---|---|---|---|---|
| 24% | 34% | 18% | 7% | 5% | 11% |

*See 'Figure 30' (page 32) for breaks by party support; See 'Figure 31' (page 33) for break by UKIP support; See 'Figure 32' (page 33) for break by attitude towards EU membership.*

Question 13. In the future, Britain may hold a referendum on whether to stay in the EU or leave the EU. The Prime Minister has also discussed the possibility of renegotiating the conditions of the UK's membership of the EU. Thinking about a possible referendum on Britain's EU membership, which of the following best sums up your current voting intention?

| | % who agree with statement |
|---|---|
| I am leaning towards voting to leave the EU, but will want to know what the conditions are before I make up my mind | 25% |
| I am leaning towards voting to stay in the EU, but will want to know what the conditions are before I make up my mind | 24% |
| I will vote to leave the EU, whatever the conditions are | 21% |
| I will vote to stay in the EU, whatever the conditions are | 15% |
| Don't know | 14% |

*See 'Figure 23' (page 28) for 2014 to 2015 comparison - polling conducted on behalf of British Future by ICM Research from 29 November to 1 December 2013, and surveyed representative sample of 2,027 adults aged 18+ in GB online.*

Question 14. Scotland held a referendum on independence in 2014, which was defeated by 45% to 55%. Do you think Scotland will be an independent country...

| ...in ten years time | ...in 50 years time | Scotland will never be an independent country | Don't know |
|---|---|---|---|
| 26% | 20% | 27% | 27% |

*See 'Figure 33' (page 36) for breaks by region.*

Question 15. As Scotland and Wales have gained a stronger national voice, some people think the English should do more to recognise and celebrate English identity - while others worry that it may provoke division. Which of the following comes closest to your view?

| | % who agree with statement |
|---|---|
| A stronger recognition of England would help the UK to work as a multi-national state in this era of increased devolution | 40% |
| A stronger recognition of England would damage the UK and make it more likely that it will break up into separate countries | 15% |
| A stronger recognition of England would neither help nor damage the UK | 25% |
| Don't know | 20% |

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