



UNDERSTANDING SCOTLAND

A NEW SURVEY FOR SCOTLAND

SOCIETY
October 2021



CONTENTS

INFORMATION	1
FOREWORD	2
OUR PRINCIPLES	3
INTRODUCTION	4
10 KEY POINTS	5
FINDINGS	7
SCOTLAND'S DIRECTION OF TRAVEL	7
PUBLIC PRIORITIES	8
TRUST	10
TRUST IN POLITICS	12
TECHNICAL DETAILS	14
FIND OUT MORE	14

UNDERSTANDING SCOTLAND

Understanding Scotland is a new quarterly survey tool measuring the most important facets of our lives and decision-making in Scotland: our society, economy, and environment.

This high-quality, large-scale survey tool is brought to you by Diffley Partnership and Charlotte Street Partners.

This inaugural wave has been made possible by, and developed in consultation with, subject-expert partners and sponsors from across diverse sectors of society. Their respective modules will be released as part of a series of reports over the coming weeks and months.



FOREWORD

THE NEED TO UNDERSTAND SCOTLAND

We are delighted to present the inaugural edition of our new quarterly study, Understanding Scotland.

Scotland sees an abundance of political polling at one extreme, and a number of large-scale annual surveys at the other. What we as a society, economy and polity lack, is regular, robust and timely data that captures the here and the now.

There is much that we do not know or monitor about economic sentiments, people's trust in key institutions, the kind of society they want to build, or indeed how happy we are as a country, among many others.

These insights and indicators are vital for effective planning and decision-making at all levels of society: politicians and policymakers need it to design effective policy and to deliver high-quality public services; businesses need it to plan their operations and investments; and the third sector needs it to understand their service-users and to inform their campaigns.

Understanding Scotland fills this vital gap in the market for robust and timely data on our lives in Scotland.



Coupling regularity with rigour, our new quarterly survey will measure and record this data at regular intervals, using robust sample sizes and analysis, to capture attitudes, understand values, and monitor trends over time.

Our large sample size of over 2,000 respondents from the adult Scottish population, will allow us to drill down into demographic and geographical nuances, and to truly understand Scotland: where it is, and where it's going.



OUR PRINCIPLES

UNDERSTANDING
SCOTLAND WILL ALWAYS
BE...

AUTHORITATIVE AND CREDIBLE

Using robust sampling strategies, research methods and data analysis, we will produce high-quality data and analysis that you can trust.

MEANINGFUL AND INCISIVE

Large, representative samples, and our in-house expertise will allow us to break findings down to a granular and local level, to unpick nuances and identify drivers of change.

UP TO DATE AND TIMELY

Regular quarterly polling will give a moving snapshot of attitudes, behaviours and confidence, providing certainty, clarity and foresight to stakeholders/partners.

NIMBLE AND RELEVANT

In addition to its regular topics, it will relate to current questions and concerns, with flexibility and responsiveness baked into its design.

INTRODUCTION

SOCIETY - OCTOBER 2021

We are delighted to present this first edition of Understanding Scotland.

Over the coming weeks and months we will roll out a series of reports outlining the public's attitudes to Scotland's society, economy and environment.

This first report lays the groundwork for understanding Scottish society as we emerge from the pandemic, and addresses the following fundamental questions: Is Scotland on the right track? Where do we want to go as a country? And who do we trust to help us get there?

The coming weeks will see similar reports on the Scottish public's attitudes and priorities with regards to the economy and the environment as the recovery and the COP26 conference get under way.

Subsequent waves of the survey will monitor changes and trends in this data. Thus, the value and insight of Understanding Scotland will grow exponentially over time, as we track, explain and anticipate long-term shifts and trends in public opinion.

UNDERSTANDING SCOTLAND

IN 10 POINTS

Our inaugural edition of Understanding Scotland brings you insights from over 2,000 members of the adult (16+) Scottish public on some of the most important aspects of our society.



01

TACKLING POVERTY & INEQUALITY IS A TOP CONCERN FOR THE SCOTTISH PUBLIC

A third of respondents (34%) put tackling poverty and inequality in the top three issues facing Scotland, at least 8 percentage points ahead of all other issues,

02

THE SCOTTISH POPULATION WANT A FAIR RECOVERY

Coupled with the economy being the second most important issue of concern, there is an evident appetite from the Scottish population for a fair recovery from the pandemic that tackles socioeconomic disparities.

03

THE ECONOMY TOPS THE CONCERNS OF THE BETTER OFF, WHILE THE LESS PRIVILEGED ARE FOCUSED ON DAY-TO-DAY PRACTICALITIES

The less well-off were more likely to prioritise poverty and inequality, the cost of living and inflation, and mental health and wellbeing, with the economy coming in fourth place.

04

OTHER PRIORITIES ARE REFLECTIVE OF THE CURRENT CONTEXT AND TOPICAL DEBATES

Recent news stories appear to have cut through, with the cost of living, mental health and wellbeing, and the environment all featuring in the public's top concerns.

05 THE ENVIRONMENT IS HIGH AMONG YOUNG PEOPLE'S CONCERNS

29% of 16-34 year-olds consider the environment to be one of the most important issues facing Scotland today, placing it in third place behind poverty and inequality (40%) and mental health and wellbeing (35%).

06 THE NHS IS SCOTLAND'S MOST TRUSTED INSTITUTION

With a fifth of people saying that they trust it 'entirely', the NHS is Scotland's most trusted group, followed by other people in Scotland, and universities.

07 CONVERSELY, THE MEDIA ARE AMONG THE LEAST TRUSTED

With 19% of people reporting that they do not trust the print media 'at all', and 14% saying the same of the broadcast media, there is evidently little faith in the journalistic profession.

08 FAITH IN POLITICS IS LOW

With a fifth of people saying that they do not trust the Government or the political system 'at all', faith in politics is low, and especially so among the less well off.

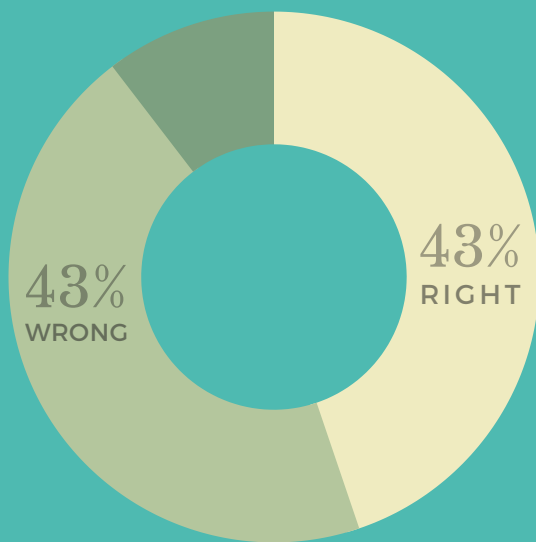
09 TRUST IS CONSISTENTLY LOWER AMONG LOWER SOCIAL GRADES

On all but one item, trust in given institutions was lower among the less well off. This was especially pronounced with regards to Government and the political system, as well as the broadcast and press media.

10 SCOTLAND IS SPLIT DOWN THE MIDDLE ON ITS DIRECTION OF TRAVEL

43% of the Scottish population believe that Scotland is heading in the right direction, while the same proportion believe that it is heading in the wrong direction, with the remaining 14% undecided.

SCOTLAND'S DIRECTION OF TRAVEL



Generally speaking, do you think things in Scotland are heading in the right direction or the wrong direction?

The country is split down the middle on the question of whether Scotland is heading in the right or wrong direction. Excluding those who are unsure, there is a 50:50 split in public opinion.

Younger and urban respondents were more likely to believe Scotland is on the right track. Conversely, male, older, and rural respondents were more likely to think that Scotland is heading in the wrong direction.



PRIORITIES

There is an evident appetite for a fair recovery, with poverty and inequality, and the economy leading people's concerns. These are followed by the constitution and devolution, the cost of living and inflation, and mental health and wellbeing.

Poverty and inequality top people's concerns regardless of sex and social class, and in all but one age bracket (i.e. 55-64). Overall, a third (34%) of respondents suggested that this was one of the top 3 issues facing Scotland today.

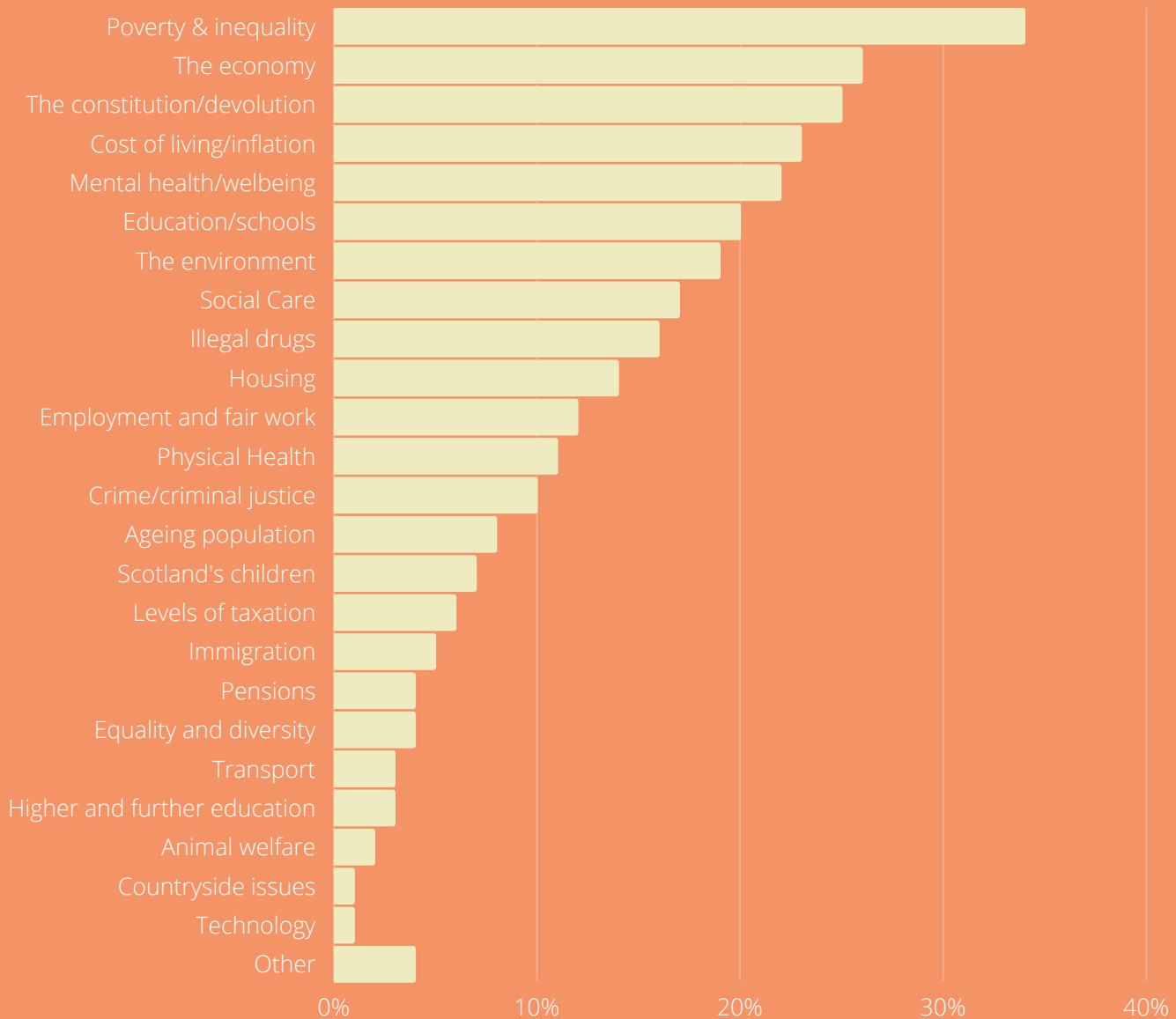
In addition to poverty and inequality, male respondents' top issues included the economy, and the constitution and devolution, where female respondents were more likely to prioritise mental health and wellbeing, and the cost of living and inflation.

Among those living in the fifth of most deprived neighbourhoods, there was higher concern for poverty and inequality (cited by 38% as a top issue), mental health and wellbeing (27%), and the cost of living and inflation (26%). There was also markedly lower concern for the economy (19%) than in the least deprived areas, where it led people's concerns with 34% deeming it as a top issue.

Younger respondents aged 16-34 were particularly motivated by poverty and inequality, with 40% of respondents ranking it among their top concerns, as well as mental health and wellbeing (35%) and the environment (29%). Among older respondents aged 65 and over, there was an above-average concern for social care, with 25% citing it as a top issue.

PUBLIC PRIORITIES

Proportion of respondents citing an issue as among the top 3 issues facing Scotland



What do you think are the three most important issues facing Scotland today? Select up to three.



TRUST

Across all age groups, sexes and social classes, the NHS was the most trusted institution listed, with a fifth of respondents (19%) saying that they trust the NHS 'entirely' and almost three quarters (72%) giving the NHS a Trust score of 7 out of 10 or higher. Overall, the next most trusted groups were other people in Scotland, followed by universities and colleges.

Conversely, trust was lowest in social media regardless of age, sex, and social class. There is broadly low trust in the broadcast and press media, and in the political system and Government.

Respondents of the ABC1 social grade reported higher levels of trust in all but one item (i.e. social media) than their C2DE counterparts. This difference was especially marked with regards to (local and national) Government and the political system, as well as the broadcast and print media.

Younger respondents reported considerably lower levels of trust in businesses, the police, and other people. Conversely, younger people had significantly more faith in charities than their older counterparts.



TRUST IN INSTITUTIONS & GROUPS

Weighted average of all respondents out of 10, where 0 is 'Do not trust at all' and 10 is 'Trust entirely'



To what extent do you trust or not trust the following. Please answer on a scale of 0-10 where 0 is 'do not trust at all' and 10 is 'trust entirely'.



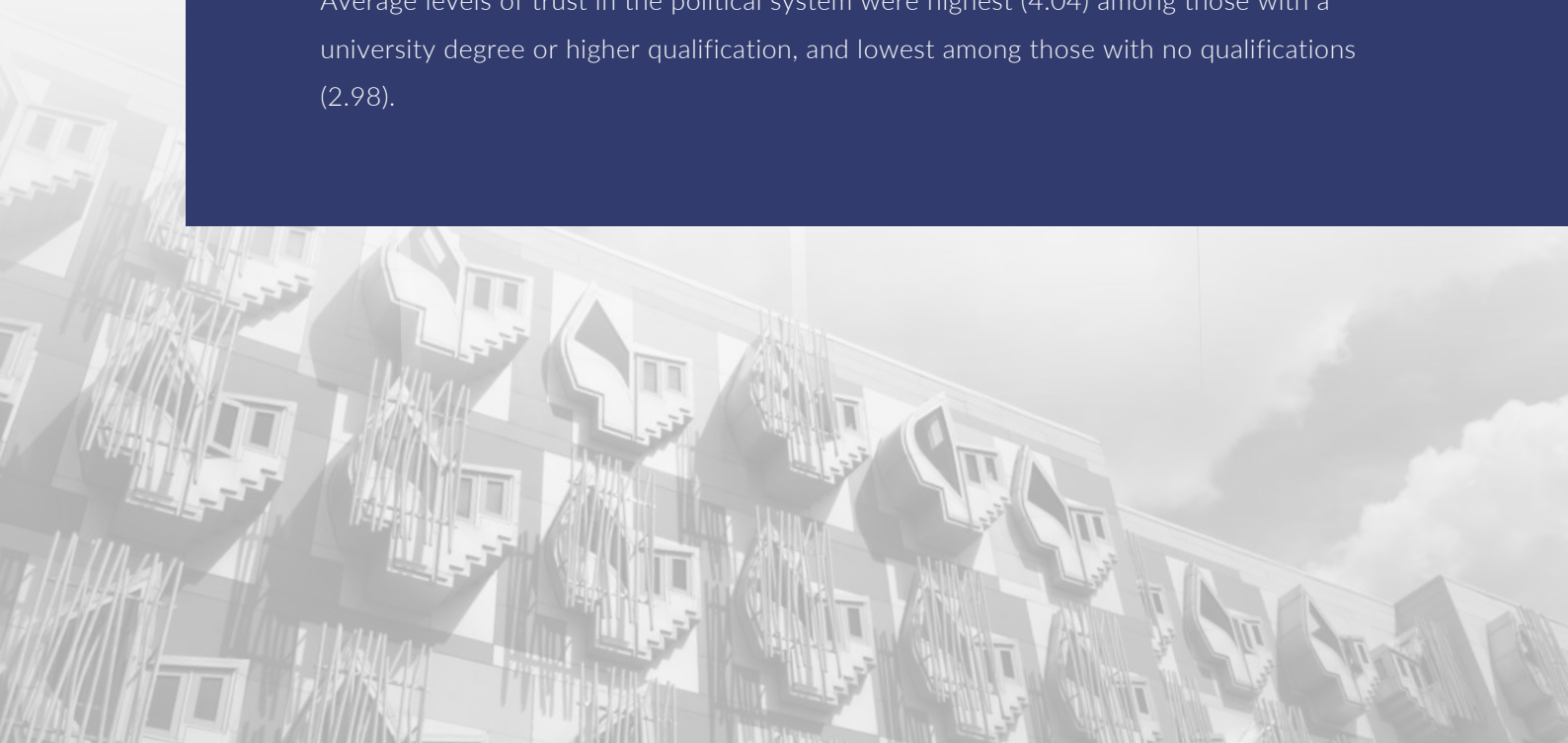
TRUST IN POLITICS

The Government and the political system more broadly, were among the least trusted institutions overall. 20% of the Scottish population report that they do not trust the government at all, compared to only 3% who trust it entirely. The equivalent proportions with regards to the political system stand at 20% and 2% respectively.

Faith in the political system was highest among the younger population, falling notably into middle age, before rising again among older age groups, with the same pattern noted regarding the Government.

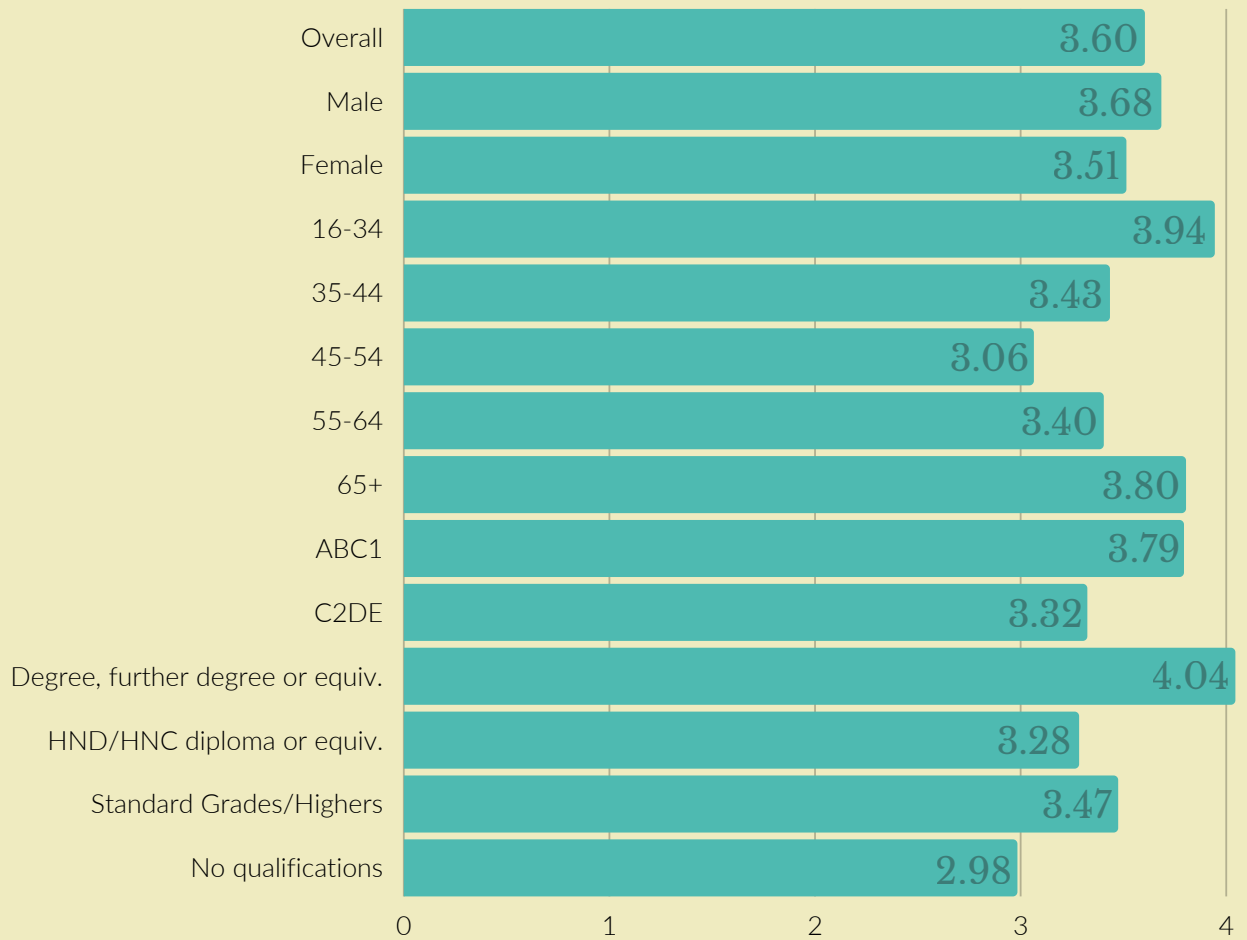
Differences between social grades were among the most marked with regards to the political system and the Government. Just under a quarter (24%) of C2DE respondents reported that they do not trust the political system at all, compared to 18% of ABC1 respondents. Similarly, respondents living in the most affluent fifth of neighbourhoods gave the political system an average 3.93 out of 10, compared to 3.08 among respondents in the most deprived quintile.

Some of the starkest differences in political trust, however, fell along educational lines. Average levels of trust in the political system were highest (4.04) among those with a university degree or higher qualification, and lowest among those with no qualifications (2.98).



TRUST IN THE POLITICAL SYSTEM

Weighted average of all respondents out of 10, where 0 is 'Do not trust at all' and 10 is 'Trust entirely', broken down by sex, age, social grade, and highest qualification



To what extent do you trust or not trust the following. Please answer on a scale of 0-10 where 0 is 'do not trust at all' and 10 is 'trust entirely'.





TECHNICAL DETAILS

The survey was designed by Diffley Partnership and invitations were issued online using the ScotPulse panel. Fieldwork was conducted between the 29th September - 1st October, and received 2,203 responses from a representative sample of the adult population, aged 16+, across Scotland. Results are weighted to the Scottish population by age and gender.



FIND OUT MORE

To explore the results for yourself, visit our website [here](#), and register for exclusive updates and a quarterly bulletin [here](#).

If you are interested in having your own questions asked and answered in future waves of Understanding Scotland, email us at contact@understanding-scotland.co.uk



UNDERSTANDING SCOTLAND

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