

SPOTLIGHT ON SCOTLAND



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Independence

The odds are still against Scottish independence, but every vote will count

New Statesman

27 June 2013

Mark Diffley

Ipsos MORI Scotland

Polls of the Scottish electorate currently show a healthy lead for those arguing against independence. But even if public opinion doesn't shift significantly in the months ahead, every vote will be crucial in determining Scotland's constitutional future after the referendum.

With Holyrood about to go into recess, it's clear that if the referendum were held tomorrow there would likely be a clear victory for those arguing for Scotland to remain in the UK. Once we get back from the summer break, there will be a year left for both sides to make their case.

For those of us keenly watching every detail of the debate, it was surprising to read the First Minister's interview in last week's *New Statesman* in which he declared: "This is the phoney war. This is not the campaign." To some extent, he's right, and all sides expect some movement in public opinion in the months ahead.

Salmond's optimism is born out of a number of factors. He believes that on-going austerity measures, particularly cuts in welfare spending, will push voters towards voting 'Yes'. He will also have an eye on the outlook for the 2015 general election and hope that next year's Commonwealth Games in Glasgow may engender feelings of Scottish nationalism in the same way that last year's Olympics enhanced pride in 'Britishness' among many voters.

The main reason to suggest some shifts in opinion though is what our polls highlight about the number of people who are still to make up their minds. 'Undecided' voters come in three categories: those who tell us they may not vote if there were a referendum tomorrow (25 per cent of adults in our latest poll from May, including 2 per cent who tell us they definitely will not vote), those who would vote but are undecided (7 per cent) and those who lean towards one side but tell us they may change their minds before polling day (12 per cent). Taken together, this represents over four in ten Scots whose vote remains up for grabs and who will become an increasingly important group as the referendum comes into clear view.

This said, at present the odds remain firmly stacked in favour of the No campaign. This is because, although there are significant numbers of undecided and uncommitted voters, there is nothing in our polling to suggest that they are currently leaning towards voting Yes in sufficient numbers to make a decisive difference to the overall result.

In fact, analysis of these groups provides more comfort to those in the No camp. Among those who tell us they are uncertain to vote in the referendum, one in five, 20 per cent, would vote Yes while half, 49 per cent, would vote No, suggesting that a campaign to encourage participation is more likely to be beneficial those in favour of Scotland remaining in the UK.



Those who tell us that they are undecided or may change their minds are more evenly split, with 38 per cent leaning towards Yes and 43 per cent towards No. The remainder cannot be even gently swayed either way at the moment.

So, assuming undecided voters do not begin switching to 'Yes' in significant numbers in the coming months, the debate may begin to switch from who will win the referendum to the margin of victory and what that means for Scotland's constitutional future.

Our polling suggests that a majority of Scots want some form of constitutional change. For instance, our June 2012 survey showed 29 per cent in support of the status quo, while more than two-thirds of voters (68 per cent) supported either full independence (27 per cent) or the 'Devo-Plus' proposals for greater powers being devolved to the Scottish Parliament.

We do not yet know what will happen to Scotland's constitutional position in the event of a No vote next year. But it is possible that more radical and significant changes become more likely in a closely contested vote. That's why every vote will be significant and strongly fought for in the run up to the referendum.

Engagement not electioneering should be the focus in schools

6 June 2013

Christopher McLean

Ipsos MORI Scotland

Following the Scottish Government's decision to extend the franchise for the independence referendum to 16 and 17 year olds, national guidance detailing how teachers should approach the subject of the referendum during lessons is expected to be published by Education Scotland this summer. However, the issue of providing information for schoolchildren has been at the forefront of the debate this week with particular focus on the extent to which the campaigns will attempt to influence young voters through schools.

Young people are unlikely to shape the outcome since they only make up 4% of the electorate, even if they could be brainwashed into voting one way or the other. The real danger is that intense scrutiny and partisan electioneering will dissuade teachers and young people from participating in the debate. The consequence is that an already disengaged group could become further alienated from the political process.

Younger people are far less likely to vote in the referendum than older people. Our most recent poll in May found that those aged 35 and over were twice as likely as those aged 18-24 to be certain to vote (80% compared to 41%). In the same poll, only 29% of 18-24 years olds said they would be certain to vote in an immediate Scottish Parliament election compared with 69% of those aged 25 and over. The recent survey by Edinburgh University did little to suggest that 14-17 year olds would be any more likely to vote as only 44% said they were very likely to take part in the referendum.

Furthermore, a recent report by the Hansard Society underlines the lack of engagement in politics among young people. Only 24% of 18-24 year olds across Britain were interested in politics, down from 42% in 2011, while the proportion that is certain to vote in an election fell from 22% to 12%. Although there is an overall decline in engagement with politics among people of all ages, the report argues that voting at an early age is likely to encourage voting in later life.

Some might argue that there is a life-cycle effect involved and that interest in politics increases as people get older and take on greater responsibilities, such as a home and family. However, analysis conducted by Ipsos MORI on generational differences suggests that this is not the case. Taking party affiliation as a proxy for interest, the analysis shows that each generation is less likely than the generation before to identify themselves with a political party. Crucially, it also shows that affiliation does not increase as people get older. This suggests that young people who are apathetic towards politics are likely to remain apathetic in later life, which could have severe implications for the future of voting in elections across the UK.



The referendum offers a unique opportunity to encourage engagement among younger people as the outcome will have a fundamental impact on their futures. It is important that schoolchildren are educated about the importance of the referendum and encouraged to participate in the debate on their own terms.

The legacy of enabling 16 and 17 year olds to vote in the referendum should not be its impact on the outcome, but that it sparks interest in politics that will last a lifetime.

Let's hear it for the 'Don't Knows'

21 May 2013

Steven Hope

Ipsos MORI Scotland

It's an old joke – I used to be indecisive but now I'm not so sure. And in the biggest constitutional decision most people in Scotland will be asked to participate in, a little uncertainty is to be expected.

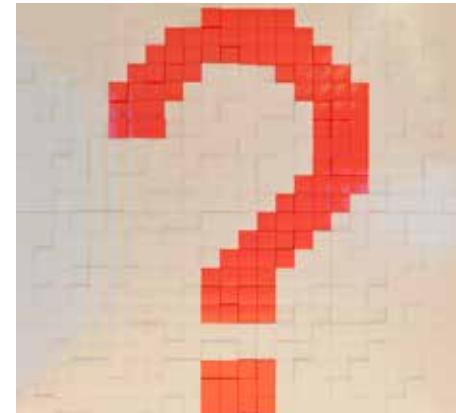
Analysis of survey results tends to pay little attention to uncertainty. We look at party support among people who are certain to vote. We look at people's intention to vote 'Yes' or 'No', hardly noticing the people who have yet to make up their mind. Maybe it's because there are so few of them and it seems like opinions have hardened. But more than a year away from the referendum perhaps we should be surprised and a little disappointed that there's not more uncertainty. At least people who are uncertain might ask questions and debate to learn and form an opinion rather than just to be louder than the other side.

Of course conviction has its place and if you were looking for people certain about supporting independence you might think that SNP supporters would be the place to start. You perhaps wouldn't think that of all the people saying that they were unsure about whether or not Scotland should be an independent country, more than half would be SNP supporters. An SNP supporter undecided about independence? Surely, that's a bit like a Green being unsure about global warming (or a bear wondering ... well, what else can bears wonder about?).

But that's what seems to be the case. Our latest poll, carried out for The Times between 29 April and 5 May, found that 10% of respondents who said they were certain to vote in the referendum were undecided about whether they would vote 'Yes' or 'No'. This pattern has been consistent in each of the previous four waves of the Scottish Public Opinion Monitor (SPOM) – our quarterly omnibus of Scottish opinion.

But when the data were published, one slide showing referendum voting intentions by party support suggested something else. In line with the tendency to only show those with clear opinions, the chart only showed 'Yes' and 'No' support. You had to calculate that among SNP supporters 14% were undecided, compared with 8% of Labour supporters. In comparison, Conservative and Lib Dem supporters seemed to be solidly following the party's position against independence – 95% and 94% respectively say they will vote 'No' – with only 2% of each undecided.

So who is undecided? There aren't many of them in a single wave of SPOM so we've combined the five most recent waves to give a big enough sample for some analysis.



In terms of social and demographic characteristics, the undecided are almost indistinguishable from the rest of the population. The key thing that stands out, and this has been noted by many analysts already, is that women less likely to say they would vote Yes. Across the combined sample from five waves of SPOM – a total sample of 3,700 adults who said they were certain to vote in the referendum – the Yes campaign would get the support of 43% of men but only 27% of women.

But this does not translate directly into opposition to independence.

There seems to be a clear link to party support at least to the extent that apart from SNP supporters, there is little variation within party blocs. Looking at Labour supporters we see that 12% of men and 10% of women say they would vote Yes. Also that 12% of Labour-supporting women are undecided compared with 8% of Labour men. Not much difference. It seems that Labour men are just a little more set in their position than women.

But there is a much greater gap between men and women who support the SNP. Over three-quarters (77%) of SNP supporting men say they would vote Yes in a referendum but only 65% of women who would support the SNP in elections to the Scottish Parliament are likely to support its defining policy in the referendum – a gap of 12 percentage points. Among female SNP supporters, 19% say they would vote 'No' (12% of men) and 17% are 'Undecided' (12% of men).

How you might interpret this depends on your viewpoint. There is the tribal line: what hope is there of a 'Yes' vote if the 'Yes' campaign can't even win the support of many people who should be on 'their side'. The flip side is that the job of convincing the undecided just got a lot easier – they are halfway there already. It's a relatively small step from supporting the SNP for the Scottish Parliament to voting Yes in the referendum.

But we'll leave that to the factions. Soberly, it suggests two things. First, that while the SNP seems to have been successful in attracting support for its policies in the Scottish Parliament – the freeze on Council Tax, free bus passes, tuition fees and prescriptions – and translating that into voting intentions for Scottish Parliamentary elections, this hasn't yet translated into solid support for its core policy of independence, particularly among its female supporters where 36% say they would vote 'No' or are 'Undecided'.

Second, and more generally, across all the parties, 30% of adults who support parties whose official position is to support independence say they will vote No or are undecided. Among supporters of parties whose official position is to vote No, 20% say they will vote 'Yes' or are 'Undecided'.

So both the 'Yes' and 'No' campaigns need to be wary of over-simplifying the parties as unified blocs of opinion. Labour may be formally in the No campaign but 1 in 9 of its supporters intends to vote Yes. Similarly, the SNP may be the party most closely associated with the call for a Yes vote but about 1 in 6 of its supporters plan to vote 'No'. Instead of trying to convince the "opposition", each would do well to look closer to home and try to understand what it is about their policy or their contribution to the debate that makes the party's own supporters want to vote with the other side.

Why it is hard to see much hope for Salmond and his political dream

The Times

10 May 2013

Sir Robert Worcester and Mark Diffley

Founder of Ipsos MORI and
Ipsos MORI Scotland



The prospect of a 'Yes' vote in next year's referendum appears to be disappearing, as those who are certain to vote and have made up their minds now say they are against independence by about two to one.

There are still nearly 500 days until the vote, and it's true that 'a week is a long time in politics', according to former Prime Minister Harold Wilson. But when there is such a gap and it's running in the wrong direction, it's hard to see much hope for Alex Salmond's realisation of his dream.

A third of Scots who tell us they will vote and have definitely made up their minds, say Scotland should be an independent country while two-thirds disagree. This two to one opposition to Scotland becoming an independent country represents a five-per cent swing in favour of support for staying in the UK since our last poll in February.

Of those in the 18-24 age group, half are supportive of independence, compared to just 27% of those aged 55 or over. Young people are significantly less likely than older people to turn out and vote on the day of the referendum, so the value of this advantage to nationalists is diminished. As a rule, 'grey' votes are four times as powerful as the youth vote, as there are twice as many of them, and they are twice as likely to vote.

Once again, support for independence among women lags far behind support among men. A little under a quarter, 23%, of committed female voters now support independence, down by five points since February, suggesting that the higher campaign profile of Deputy First Minister Nicola Sturgeon has yet to persuade more women to back the nationalist cause.

And there is nothing to suggest that those who remain uncertain whether to vote and undecided about which way to vote in the referendum are leaning heavily towards supporting independence. Among those who tell us that they are not certain to vote and who have not definitely decided how they will vote, 16% would support independence while 33% wish to remain in the UK.

These last few weeks have been difficult for the 'Yes' campaign as the UK government has stepped up its efforts to persuade Scots to vote 'No' in 2014. In particular the debate around the currency options in the event of a 'Yes' vote was widely seen as being beneficial for the 'No' campaign. And the recent debate around state pension provision in an independent Scotland may also have had some negative consequences on public opinion as far as the nationalists are concerned.

So, where now for the two campaigns? An historical perspective on previous campaigns highlights the challenges faced by 'Yes Scotland'. Nationalists often cite the remarkable turnaround in the SNP's fortunes before the Holyrood election of 2011 as evidence that their dream of independence remains achievable. However, the poll leads enjoyed by Labour in advance of that election were far less than those enjoyed by the 'No' camp in our new poll. And there is nothing to suggest that the nationalists will have the advantages of an ineffectual and discredited opposition which the SNP benefited from in 2011.

Still, remember that at the time of the 1975 EEC referendum, Gallup found that by % the British public intended to vote 'out', not 'in', and six months later the referendum vote was 67% to 33% in favour of staying in. But then all the major national newspapers, the trade unions and big business were in favour of a yes vote; it's not like that in Scotland today, and therefore opinion is less likely to swing in favour of independence.

So, while we are still a long way out from the vote and events may change opinion, it is clear that nationalists face a serious challenge in the months ahead. And there will need to be an unprecedented change in public mood for their dream of independence to be realised.

Business leaders and the prospect of independence

Business Scotland

8 May 2013

Mark Diffley

Ipsos MORI Scotland



Hardly a week goes by without the media reporting the views of a well-known business figure on the forthcoming referendum on independence. Whether it's Jim McColl pledging his support for 'Yes Scotland', Michelle Mone threatening to move her business south in the event of a 'Yes' vote or Sir Tom Farmer arguing for the detailed debate to be postponed until nearer the date of the referendum, we seem to have a keen appetite for reading the latest deliberations from the business community in advance of next year's vote.

For the two campaigns at the heart of the debate, endorsements from business leaders, like those from celebrities, are huge prizes. Each time a well-known entrepreneur or business leader publicly states any opinion on the perceived economic effects of a vote for independence, one side or the other takes to the airwaves or to their laptops, trumpeting these views as proof either that Scotland would be more prosperous as an independent country, or that the economy will go to hell in a handcart if we separate from the rest of the UK.

Perhaps this at least partly explains why so many business leaders and large employers are so reluctant to state their opinion. What would they gain from such public pronouncements and would their views really affect the outcome anyway?

While the reluctance to make public announcements, particularly at this stage of the campaign, is understandable, our polling illustrates that the single most important issue to voters ahead of the referendum will be around business and the economy. And, of course, it is decisions made by large employers and business figures in Scotland that will, in part, drive the economic future of the country.

Conducting surveys is one way round the reluctance to make public announcements, offering the opportunity to give an entirely confidential view. When Ipsos MORI last took the temperature of senior decision-makers in medium sized and large organisations in the autumn of 2012, we found that over half thought that independence would worsen prospects for their business and seven in ten thought it would have a negative impact on the Scottish economy as a whole.

On the face of it this seems like a pretty definite statement. But there are a couple of notes of caution. Firstly, the survey was conducted a full two years before the referendum and before the detailed debate about the economic consequences of independence has taken place. Secondly, the survey may, in part, reflect a natural conservative stance of many business leaders, who prefer dealing in certainty than perceived risk. In advance of the first Holyrood elections in 1999, our survey of senior business figures in Scotland revealed that only a quarter expected devolution to yield an improved business environment. Yet in the period since, it is widely acknowledged that much of the business community has benefited from devolution.

Our 2012 survey also found that three quarters of senior business decision makers in Scotland had yet to begin planning for the possibility of Scotland becoming an independent country. This may also reflect the possibly conservative outlook of many business leaders. It may also reflect a view that, according to polling evidence over many years, there is a greater likelihood of Scotland staying within the UK than there is of a vote for independence. Although our latest general public polling in February showed a marginal increase in support for independence, all recent polls and a historical view perspective of polls illustrates the challenge faced by 'Yes Scotland' if it is going to win the referendum. The other reason for an apparent lack of preparation for the possibility of independence may also simply represent business priorities, in other words most business leaders are running their core businesses rather than planning for the possibility of independence.

The referendum is still over a year and a half away and the detailed debate around the future of Scotland's economy and business environment is still to be had. We may never publicly know the views of many of Scotland's leading business figures and companies but further research will throw light on the overall views of businesses of all sizes. And the decisions and actions of the business community will continue to be crucial in determining Scotland's economic future, regardless of the result next year.

How much does the referendum question matter?

The Times

5 February 2013

Lorraine Murray

Ipsos MORI Scotland

In the autumn of 2014, we will be asked what is, perhaps, the most important question in our democratic history. The wording probably won't affect the outcome. We all know what the question is about. And most of us already know what our answer will be.

So if the question wording is unlikely to affect the outcome, does it matter? Yes. It matters that arguments about the wording of the question do not detract from the debate about the real issues. And it matters that people have faith in the democratic process and accept the outcome as being a fair reflection of the will of the Scottish people. It matters that the question doesn't matter.

For a referendum question to work it must pass two tests. Firstly, voters must understand what they are being asked and find it easy to answer the question in a way that matches their views on the issue. Secondly, voters must perceive the question to be neutral and not to encourage a particular response. Thorough testing with voters is the only way to determine whether a question works.

Note that testing can only examine the perceptions of the neutrality of a question. There is no way to test whether a referendum question actually is neutral. Large scale surveys of the population could be used to test different versions of a question and see which wording was more likely to lead to a particular result and how much difference it was likely to make. But there is no way of knowing the 'true' result because all we can do is ask the question in different ways – all of which are potentially flawed or biased in some way. It's true that a version that led to a wildly different result from other versions (or from recent polling on the issue) would seem suspect, but assuming that the wording isn't blatantly leading and makes a relatively small difference, we would have no way of knowing which of our versions came closest to the 'real' level of support/opposition.



The question recommended by the Electoral Commission and accepted by the Scottish Government - "Should Scotland be an independent country?" - has been thoroughly tested with voters. People understand what they are being asked. The question does its job. It can do no more. What's needed now is more information and debate on the real issues so that Scotland can better decide how it wants to answer.

What impact will national identity have on the outcome of the referendum

Politics.co.uk

13 September 2012

Christopher McLean

Ipsos MORI Scotland

Recent polls have shown a decline in support for independence, a trend which many commentators have attributed to the impact of the Queen's Diamond Jubilee and Team GB's performance at the London Olympics. It's been argued that the consequent promotion of 'Britishness' has strengthened support for the Union.

Likewise, some have argued that the SNP's decision to hold the referendum in 2014 is based on an assumption that the combination of the Commonwealth Games being held in Glasgow and the 700th anniversary of the Battle of Bannockburn will generate an increased sense of 'Scottishness', boosting the chances of a 'Yes' vote.

This begs the question: what impact will public feelings of national identity have on the outcome of the referendum?

Evidence does suggest a link between national identity and attitudes towards independence. Our most recent poll, conducted in June, found two-thirds of those who described themselves as Scottish not British support independence, while over three-quarters of those who described themselves as equally British and Scottish oppose it. Indeed, trend data from the past 20 years shows that fluctuations in the proportion of the population who consider themselves Scottish and not British reflect changes in support for independence.

A closer look at the data provides some hope to both sides of the campaign.

For the nationalists, the relatively high proportion of Scots describing themselves as Scottish not British between 1999 and 2001 closely followed devolution and the opening of the Scottish parliament. This would suggest that the campaign for devolution went some way to instilling a greater sense of 'Scottishness' among the population. Could a similar campaign ahead of the referendum do likewise?

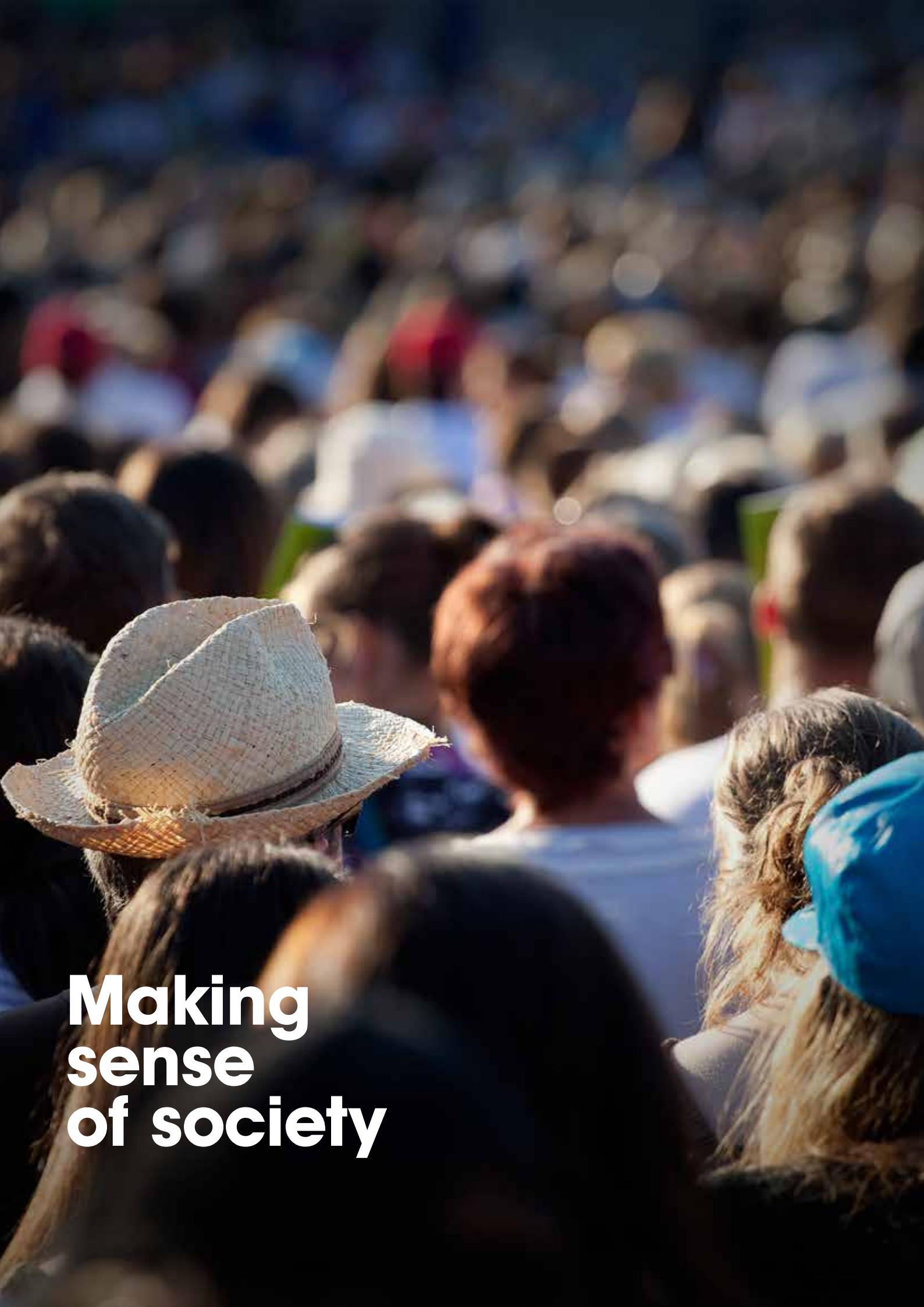
The unionist camp can take heart from the fact that, minor fluctuations aside, the trend over the last ten years suggests that Scots are becoming less inclined to consider themselves Scottish rather than British. This may be the result of Scots becoming more comfortable with the constitutional settlement following devolution. Our polling consistently shows a stronger preference among Scots for further devolution rather than outright independence, which may work in the unionists' favour if they can articulate the advantages of devolved government within the union.

However, it would be dangerous for either side to concentrate too strongly on accentuating either 'Scottishness' or 'Britishness' in the forthcoming campaign.



The link between national identity and attitudes towards independence is particularly clear cut when explaining partisan positions. Those who consider themselves as exclusively Scottish are far more likely to vote 'Yes', while those who consider themselves equally British and Scottish are far more likely to vote 'No'. These positions will be difficult to change and are likely to become even more entrenched as the referendum approaches.

The group which will be of greatest importance to both camps, is made up of those who describe themselves as more Scottish than British. Attitudes towards independence are finely balanced among this group: 45% oppose independence, 38% support it and 12% are undecided. The proportion of Scots in this group (around a third of the adult population) has been relatively stable, particularly in the last ten years, which suggests they are less likely to be swayed either way by nationalistic sentiments. They are also exactly the group that both sides need to win over in order to secure victory.

A photograph showing a large, dense crowd of people from behind. In the foreground, the back of a person's head is visible, wearing a light-colored straw hat. The crowd extends into the distance, creating a sense of depth and community.

**Making
sense
of society**

Scottish universities and reputation management

Scottish Policy Now

13 July 2013

Sara Davidson

Ipsos MORI Scotland

March saw the publication of the Times Higher Education World Reputation Rankings. Only seven UK institutions were ranked in the top 50 and, of these, only one – the University of Edinburgh – was Scottish (ranked 46th).

The Russell Group, the main representative body for the UK's leading research universities, responded to the Rankings by pointing out that UK institutions "punch above their weight" and "do more with less", outperforming most rivals relative to expenditure. Still, there is no doubt that the Times data will have come as a major disappointment to all those charged with marketing UK institutions – and Scottish ones more especially – who over recent years have been battling harder than ever to attract a greater share of the global market amidst increased competition from the US, East Asia and Europe. So, why aren't Scottish institutions performing better in reputational terms and is there more that can be done to address this?

Research conducted by Ipsos MORI Scotland over many years has provided some possible answers to this question. On the one hand, we have found good brand recognition, among international academics and prospective / current students alike, of some of Scotland's ancient institutions; particularly Edinburgh. (Rankings like those produced by The Times appear to have been key in fostering this recognition, along with promotional efforts on the part of individual institutions and word of mouth advocacy).

More generally, we've found evidence that international awareness and perceptions of Scotland as a study destination have been positively affected by key Scottish Government strategies over the years, particularly the Fresh Talent: Working in Scotland scheme and the current policy of offering free tuition to EU nationals.

On the other hand, it is also clear from our work that, for the large proportion of non-Scottish domiciled academics and prospective/current students, Scotland remains something of an unknown quantity and this significantly undermines the potential appeal of even its best institutions. Even among 'Rest of UK' (RUK) audiences, self-reported familiarity with Scotland is often astonishingly low, with perceptions of the country tending to reflect (largely negative) national stereotypes – for example, that Scotland is predominantly rural; that its towns and cities are quiet/quaint with little in the way of night-life; that the Scottish accent is hard to understand; and that the weather is consistently cold and wet. Among some applicants there is also a perception that Scottish degrees are less highly regarded by employers than those obtained south of the border.



The Scottish university fee structure has furthered detracted from the country's appeal among the RUK applicant market specifically. The fact that English, Welsh and Northern Irish students are charged tuition fees while Scottish and EU students are not has been interpreted by some RUK applicants as a tacit signal that they are not welcome in Scottish universities.

A number of developments on the horizon have the potential to further shape perceptions of Scottish institutions, both in the rest of the UK and further afield. Arguably, the most significant of these is the result of the 2014 independence referendum. In an independent Scotland, RUK students may have the status of EU students and therefore could be entitled to free tuition. While this could increase significantly the appeal of Scottish institutions to those students, it could also, as Riddell et al have recently highlighted, result in Scots students being squeezed out of their home institutions. Accordingly, there has been some suggestion of reserving quotas for Scottish domiciled students or of introducing a separate admissions system for EU students, involving an administration fee. Clearly, however, these options could have downsides in terms of Scotland's UK and global competitiveness.

An independent Scotland could also herald changes to research funding in Scottish universities. Currently, Scottish academics compete with their peers across the UK for research grants from the Research Councils and, indeed, have traditionally received a disproportionate share of those grants. Universities Scotland and individual Scottish university principals have expressed concern that if Scottish institutions were to lose access to these funds under independence, they may find it difficult to retain and attract the highest calibre academics (and by extension students) from across the globe.

Alongside these potential challenges, a host of other developments are likely to impact on the attractiveness of Scotland's HE sector over the coming years; in particular, the recent changes to international students visas, yet greater competition from global competitors and, on the domestic front, the introduction of the Curriculum for Excellence and outcome agreements – which both raise important strategic questions concerning the role of universities in 21st century Scotland.

Against this backdrop, it will be more important than ever for institutions to continually take stock of how they are perceived by key external audiences – from prospective undergraduates and postgraduates to academic staff and employers – and to ensure that their branding, marketing and recruitment strategies are clearly informed by this evidence; as well as wider intelligence on target markets' needs and expectations. At the same time, and given the significant role that perceptions of Scotland as a country appear to have on evaluations of individual Scottish institutions, there is a strong case to be made for greater cross-institutional (and, indeed, cross-sectoral) working towards common objectives.

Public service reform and public opinion

7 May 2013

Mark Diffley

Ipsos MORI Scotland

Reform to public services in Scotland is coming. When the Christie Commission published its 2011 report, setting out how the welfare state was facing its most serious challenges since inception, reform began in earnest.

The report, accepted in its entirety by the Scottish Government, outlined how increased demand for public services, driven in the main by an ageing population, has combined with the ongoing squeeze on public spending to create these challenges.

These issues are highlighted by predictions that the population of pensionable age is set to rise by 26% between 2010 and 2035, while the working age population is set to rise by only 7% over the same period. At the same time, it is estimated that the Scottish public sector budget is likely to suffer a £39 billion shortfall between 2010/11 and 2025/26, the year when the budget will finally return to 2010 levels in real terms.

Policymakers tasked with implementing changes to public services therefore face considerable challenges. As well as likely resistance to significant change from within the organisations who deliver services, a range of evidence from opinion surveys highlights that the public too is likely to resist significant changes to the status quo and will be difficult to win over to radical reform.

In accepting the Christie report, the current Scottish Government has stated its commitment to shifting resources towards preventative action, better partnership working between service delivery bodies and enhanced reporting of public service performance. But what about more radical reform in terms of how services are planned and delivered?

Ideas about market-oriented management of public services, adopted by UK governments of all shades since the 1980s, have not gained traction with devolved administrations in Holyrood. In part this is down to these administrations reflecting the significantly different views of the public in Scotland, compared to attitudes south of the border.

Put simply, Scots view public services as hugely important, are increasingly satisfied with their delivery and are wedded to the current model of these services being delivered by public bodies. According to the 2011 Scottish Household Survey, 88% of adults in Scotland are satisfied with local health services, up from 81% in 2007. Similarly, levels of satisfaction with local schools rose by 6-points over the same period, from 79% in 2007 to 85% in 2011.



Moreover, when we compare Scotland with the rest of the UK, we can see different attitudes to how public services should be delivered and funded. For example while the appetite for increasing taxes to pay for additional spending on health, education and social benefits has declined in both Scotland and England during the 2000s, it remains an option more favoured in Scotland, with 40% supporting such a policy move, compared to 30% of the public in England.

When it comes to the delivery of public services, the strength of public opinion in Scotland opposed to radical change becomes clearer. Scots have clearly different views from their neighbours about how public services should be delivered in order to maximise value for money, understand what service users need, provide care and compassion and provide a professional and reliable service.

On each of these performance criteria, Scots are clear that public authorities are best placed to provide public services. Moreover, public opinion surveys illustrate that the appetite for the involvement of the private sector in the provision of public services is significantly higher among the public in England and Wales than it is in Scotland.

When asked which sector would be best at providing public services that best understand what service users need, over half of Scots (54%) believe public authorities do the best job while just 11% believe that the private sector would do a better job, compared to figures of 30% for public authorities and 16% in favour of the private sector among adults in England and Wales. Similarly, 58% of Scots believe that public bodies would provide the most professional and reliable public services, compared to 19% who would favour the private sector in that regard. This contrasts with figures of 30% for public bodies and 29% for the private sector among adults in England and Wales.

Even when asked to consider which sector would provide the best quality service for the money, a measure where one might expect public bodies to do less well, 50% of Scots believe the public sector would provide the best public services, compared to 17% in favour of the private sector. Again, this contrasts significantly with England and Wales, where 27% believe the private sector would perform best on this measure, while 25% preferred public bodies.

This survey data has significant implications for policymakers in Scotland. Any moves to 'privatise' the delivery of public services in Scotland is likely to be met with much sterner public opposition than is the case south of the border. While this may not be on the immediate political agenda, it is clear that the public is very much supportive of the status quo in terms of how these vital services are provided and delivered.

The current political discourse in Scotland is dominated by next year's independence referendum. But regardless of the outcome of that vote, and the results of the Westminster and Holyrood elections of 2015 and 2016, the need for changing the public services landscape will be an ever present challenge. Whoever is charged with delivering reforms will need to be wary of the strength of public opinion and work hard to ensure that the public is brought along every step of the way.

The acceptability of carrots

1 November 2012

Jane Eunson and Lorraine Murray

Ipsos MORI Scotland



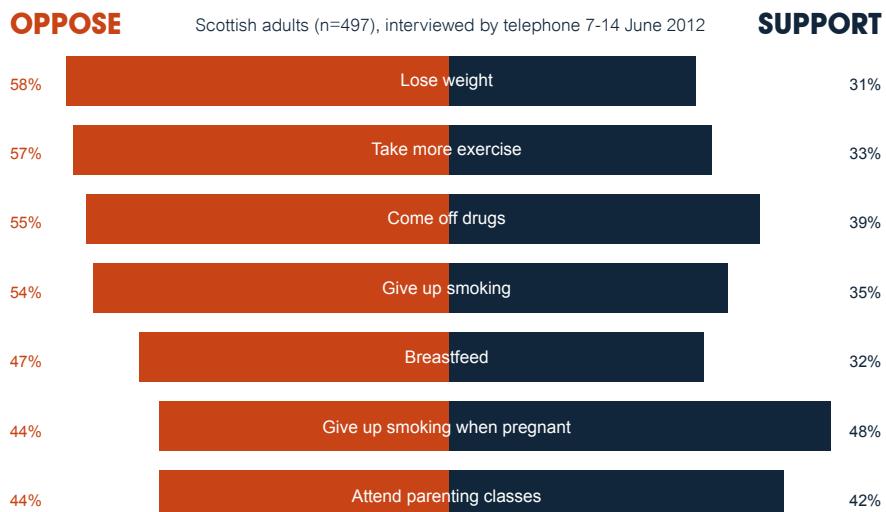
Using financial incentives to encourage behaviour change raises questions about their effectiveness - but also about their acceptability in the face of moral concerns. We look briefly at the current evidence base before exploring the views of the Scottish public on whether, and when, they should be used.

One way that public bodies try to encourage better, healthier lives is by using financial incentives. People who make positive steps to change their behaviour - stopping smoking or taking more exercise classes for example - are rewarded with cash or vouchers. As with any intervention, incentive schemes need to be shown to be effective before they are implemented more widely. Incentive schemes, however, face the additional task of overcoming the moral concerns of some sections of the public.

INCENTIVES CAN WORK – AT LEAST IN THE SHORT-TERM

Some incentive schemes show impressive short-term results but several studies show disappointing results a year or so after the intervention. While the literature identifies some features of incentive schemes that appear to impact on their success, a greater understanding of how incentives influence behaviour is needed to maximise their effectiveness. It does, however, appear that incentives have the potential to act as a 'hook', encouraging people to engage with services and make short-term changes. Professionals then have the chance to work with them to tackle the root causes of their behaviour and help them to sustain the changes – an opportunity they must take full advantage of.

LEVELS OF OPPOSITION/ SUPPORT FOR PAYING PEOPLE TO CHANGE DIFFERENT BEHAVIOURS



BUT THEY RAISE MORAL CONCERN

However, even if incentive schemes show long-term results, governments still have to convince some of us that they are acceptable. Criticisms include it being an unfair use of public money to 'reward' people for their previous 'bad' behaviour (e.g. smoking, over-eating or drug-taking) and concerns about the potential negative effect on our intrinsic motivations – could we become a society driven by the need for a reward and less willing or able to do things for our own sake? There are also those who feel such schemes are morally wrong because they amount to bribery or coercion.

WHAT DO THE SCOTTISH PUBLIC THINK?

Results from our recent survey show that Scottish adults are more likely to oppose than support schemes which involve paying people to encourage them to change their behaviour. However, as the chart below illustrates, there is less opposition to some things than others. Opinion is divided on paying people to give up smoking when pregnant (49% support and 44% oppose) or attend parenting classes (42% support and 44% oppose). For other behaviours, higher proportions oppose than support, with the highest levels of opposition being for paying people to lose weight (58% oppose) or take more exercise (57% oppose). It seems there is a little less opposition when there is a direct benefit to children.

LEVELS OF OPPOSITION/ SUPPORT FOR REWARDING PEOPLE TO CHANGE DIFFERENT BEHAVIOURS

OPPOSE

Scottish adults (n=497), interviewed by telephone 7-14 June 2012



INCREASE IN SUPPORT WHEN ASKING ABOUT 'REWARD' RATHER THAN 'PAYMENT'

INCREASE

Scottish adults (n=497), interviewed by telephone 7-14 June 2012



However, the results also show that the nature of the incentive and the way schemes are described affects how people respond. Half of our sample was asked the same question with the

words 'payment' and 'paying' replaced by 'reward' and 'rewarding' - descriptions which do not necessarily imply the use of money. As the charts below show, this makes a big difference: we now have a

majority in support of schemes which 'reward' people.

But perhaps some of the opposition is because people are sceptical of the benefits of such schemes - rather than because they are morally opposed. People who said they were opposed (to paying or rewarding people to change one or more of the behaviours listed) were asked whether their view would change if incentives were found to save the country money overall. This shifted the views of half of those who were initially opposed: 26% said they would be more likely to support such schemes and a further 27% said they would be more likely to support them for some of the behaviours but not others. The remaining half (47%) said it would make no difference.

WHERE NEXT?

There is still a way to go before financial incentive schemes are recognised as effective mechanisms for behaviour change, with further research required to identify the situations in which they work best and the factors which maximise their long-term effectiveness. And the debate about the morality of such schemes will continue – a minority remain opposed on principle. But the nature of the incentives, what they are called ('rewards' rather than 'payments') and evidence that schemes are cost-effective will make a substantial difference to their acceptability in the eyes of the public.

Minimum pricing and underage drinkers

23 October 2012

Carolyn Black

Ipsos MORI Scotland

Scotland's unhealthy relationship with alcohol is well-documented. In 2010/11, there were 38,825 alcohol-related discharges from acute hospitals across the country (a rate of 695 per 100,000 population) and, in 2009, over three quarters of young offenders said that they were drunk at the time of their arrest. In response, the Scottish Government has introduced a range of measures to try and tackle the problem, the most publicised of which has been the recent passing of legislation to introduce a minimum price of 50p per unit of alcohol.

The potential impacts of minimum pricing have been widely discussed in relation to adult drinking. However, it is not only adults of legal age that will feel the effects of the new law. What impact will this legislation have on underage drinkers?

To explore the financial impacts of minimum pricing on teenagers, we used data from the 2010 Scottish Schools Adolescent Lifestyle and Substance Use Survey (SALSUS). This provides detailed estimates of the number of units of alcohol consumed by 13 year old and 15 year old teenagers in the previous week. Using this data we calculated the average weekly alcohol value both at current prices and with the preferred minimum price of 50p per unit.

Overall, 13 year olds drank an average of £6.70 worth of alcohol and 15 year olds drank an average of £8.45 at current prices. With minimum pricing the average 13 year old drinker would see the cost of their consumption increase by 23% to £8.25 and 15 year olds would see an increase of £2.01 or 24% more. The key issue is in estimating the effect of this rise which looks substantial in proportional terms but modest in monetary terms. Would an extra £2 a week act as a deterrent to underage drinking?

There are two reasons why it is difficult to gauge the impact of minimum pricing without further research being conducted. Firstly, we know from SALSUS that a large proportion of alcohol consumption by teenagers is paid for by someone else. Indeed, the survey revealed that around two thirds of 13 year olds and around a third of 15 year olds said that they spent nothing on alcohol, even though they reported drinking it. For these young people, it seems minimum pricing would have no direct effect on alcohol consumption.



Secondly, the impact of the wider debate on alcohol use and minimum pricing on consumption will not be measured purely in monetary terms. For instance, it may lead to a change in the wider drinking culture, making it less acceptable to drink to excess, or it may lead to their parents purchasing lower amounts of alcohol, and, consequently, less alcohol would be available to them.

It is vital for government and public health bodies to be able to measure the impact of minimum pricing, to evaluate the extent to which it will contribute to improving long-term outcomes for today's young people. Currently, the main problem in exploring underage drinking is the lack of information available. Underage drinkers cannot be isolated in sales figures and there is little empirical evidence about where underage drinkers source their alcohol. Without further data we cannot make the assumptions required to provide an answer on the impact of minimum pricing among this group. Until further research is conducted to establish where underage drinkers get their alcohol from and how they fund it, the impact of alcohol minimum pricing on underage drinkers cannot truly be assessed.

The complexities of the impact of 'Bedroom Tax'



12 October 2012

Steve Treanor

Ipsos MORI Scotland

At the recent Scottish Government/COSLA National Homelessness Event, I was interested to learn what progress had been made by local authorities and the Housing Options Hubs towards achieving the 2012 Homelessness Commitment, since our evaluation earlier this year. While the progress achieved called for optimism, attendees were reminded of the potential challenges posed by the forthcoming Housing Benefit Reform.

The central aspect of the reform is the introduction of a new size criterion which means that from April 2013 any working age household will have their housing benefit reduced if they live in social rented accommodation that is considered too large for their needs. The rationale is to improve work incentives, reduce reliance on benefits and encourage social landlords to use their housing stock efficiently.

The choice for those affected is either to make up the shortfall in their rent or move to a smaller property, potentially in a different local authority area. Affected households will be offered financial incentives to move, while those who stay may run the risk of not being able to afford their rent, falling into arrears and potentially losing their home.

However, in reality it is unlikely to be a straightforward choice. Analysis carried out by the Scottish Government suggests that moving all those affected into suitable accommodation simply isn't possible due to a mismatch between the sizes of property available and required, particularly a severe lack of one-bedroom homes. This reflects a long standing strategy of building larger properties to ensure the sustainability of households and communities.

Even among those for whom moving is an option, the decision to move is unlikely to be based purely on financial considerations. The interaction between people and their homes is complex. The properties in which we live are much more than simply a roof over our heads. There are emotional and social dimensions to the relationship and people may not willingly move from existing support networks such as friends, neighbours and family. Further, households may have good reasons for under-occupying their homes. For example, separated parents may have an additional room to accommodate overnight stays as part of the access arrangements of their child(ren). It won't be easy for social landlords to encourage those affected to move. Similarly, there is unlikely to be many households renting out a "spare" room.

Under-occupation has also been part of some landlords' letting policies, in order to:

- fill larger void properties which are in low demand (for example, North Lanarkshire Council)
- place homeless households without having to incur the costs of placing them into temporary or emergency accommodation (for example, South Ayrshire Council)
- support wider objectives around health, crime and education. For example, the SFHA's report on the impact of Welfare Reforms noted that Hillhead Housing Association have an allocations policy which allows each child aged 14 years of the same sex a separate bedroom. This recognises that children of that age will be preparing for exams and will need space to study.

What impact, if any, will the removal of this degree of flexibility in lettings policies have on individual households, landlords and communities? Previous research has identified links between housing and physical and mental health, crime and education but the exact impact of housing benefit changes on these areas is extremely difficult to predict and measure. Further, it is very much dependent on the current situation in which moving households find themselves. For example, having settled accommodation, close and supportive neighbours, friends, family, social interaction, social participation and engagement within local communities and the extent to which people are satisfied with their residential neighbourhood are all strong positive influences on mental wellbeing.

All of these factors can take years to develop and the removal of some, if losing housing benefit forces them to move, may well result in lower levels of wellbeing.

There is a large degree of uncertainty around exactly how Housing Benefit Reform will impact on individual households, landlords and communities. Scottish Government analysts estimate that 95,000 households could be affected and although this analysis did not estimate the potential social impacts of changes, it acknowledged that "The social costs of the policy in terms of the potential impact ... on health, crime and education outcomes may be significant".

Efforts are being made to mitigate the potential effects of the changes but the impact will only become known following the introduction of the changes in 2013. Therefore, a clear strategy for monitoring and evaluating both the short and longer term impact of the changes will be needed.

While the UK Government will evaluate the changes (as well as the overall benefit cap and Direct Payments), the extent to which this will focus on the impact on landlords and affected tenants in Scotland will depend on the scope of the exercise. The Scottish Government and other organisations in Scotland, such as the SFHA, may want to carry out their own evaluation.

Tracking the full impact of the changes will need a longitudinal design with both primary survey and qualitative data collection from landlords and tenants and analysis of administrative data held by landlords. This will capture both the economic and social impacts. It will ensure that the breadth and depth of issues are captured and identify best practice in how landlords have tried to mitigate the effects.

Capturing accurate baseline measures of key indicators before the changes come into effect is crucial so that changes can be monitored. Our colleagues in England, in collaboration with Cambridge Centre for Housing and Planning Research, at the University of Cambridge, are currently collecting baseline data as part of a project to assess the impact of Welfare Reform on housing association tenants in England, on behalf of the National Housing Federation.

Following the introduction of the changes, the impacts should then be tracked periodically over the course of two to three years. An exercise of this scale would provide a robust evaluation of the full impact of the changes.

Measuring fuel poverty in Scotland

4 October 2012

Chris Martin

Ipsos MORI Scotland



There has been recent heated debate on moves in both Scotland and England to reassess how fuel poverty is measured and the resulting policy implications. The method for estimating fuel poverty - how many people cannot heat their homes to an acceptable level at a reasonable cost - has been consistent for over a decade. A household has been in fuel poverty if it needs to spend 10% or more of its post-tax income on gas and electricity. In Scotland, this has been derived from the Scottish House Condition Survey (SHCS).

Last year, the Hills Fuel Poverty Review suggested amending the definition of fuel poverty in England to include only those with low incomes and high heating costs (removing those with high incomes and high heating costs, and those with low incomes but low heating costs). The Scottish Government has also recently published a detailed discussion paper assessing the definition, measurement and analysis of fuel poverty.

The driver for these has come in part from the need to target resources at a time when there has been a sizeable increase in fuel poverty. While in Scotland the proportion of households in fuel poverty fell between 1996 and 2002 because of increased income and falling fuel prices, since then it has risen dramatically - from 13% of households in 2002 to 28% in 2010. Current trends suggest that by 2016, half of all households may be in fuel poverty. This was the date given in the Scottish Executive's 2002 Fuel Poverty Statement to eradicate fuel poverty.

It is clear from the Scottish Government's evidence review that the recent rises in fuel poverty have come about because of a substantial rise in fuel costs and static incomes despite considerable improvements in the energy efficiency of the housing stock. It notes that over the last 7 years, the proportion of dwellings with loft insulation has more than doubled, solid wall insulation has almost doubled and cavity wall insulation has increased from 33% to 62%. Indeed, it suggests that if everyone lived in dwellings with 'exceptionally good' energy efficiency, 14% would still be fuel poor.

Regardless of the issues of redefining fuel poverty, it is clear that more and more people are struggling to pay energy bills. In order to try and address this trend, the Scottish Government needs to consider its response in terms of the key factors that determine the level of fuel poverty, energy costs, energy efficiency of new homes and incomes.

The key driver of fuel poverty is the cost of gas and electricity and these costs look likely to increase given that natural energy stocks are continuing to diminish. While government's ability to directly affect household energy bills is limited, it can support investment in micro-renewable sources of domestic energy, such as ground source heat pumps, solar photovoltaic systems, to make them more appealing and more necessary. Schemes such as the Renewable Heat Initiative, currently out for consultation by DECC, should help support domestic households in Scotland move away from fossil fuels and alleviate fuel poverty.

The Scottish Government should also continue to ensure that the energy efficiency of the housing stock is maximised in order to reduce household energy costs. This is most likely to happen by ensuring that new houses are built to the highest energy efficiency standards and that improvements to the existing stock are facilitated.

The rate of fuel poverty will also be influenced by levels of income, raising questions for governments about what assistance to give with fuel bills and who should receive it. This feeds into an ongoing debate about the means-testing of benefits such as the Winter Fuel Allowance. However, even if a government proposed the full means-testing of winter fuel payments, the Scottish Government's evidence review highlights that those in fuel poverty do not necessarily overlap with those in receipt of benefit so such targeting of resources may be difficult.

Labels, damn labels and statistics

18 September 2012

Dr Sara Davidson

Ipsos MORI Scotland

In the spring 2009 edition of our newsletter Approach, my colleague, Steven Hope, suggested that there is scope for public bodies to make more use of existing statistical and research evidence. Similar sentiments have been expressed, with increasing regularity, by public bodies themselves over recent years. Indeed, the Scottish Government has been working with a range of partners to establish a collaborative strategic framework to facilitate increased cross-sectoral data linkages for research and statistical purposes. These linkages, involve joining two or more administrative or survey datasets and have the potential to significantly increase the power of analysis possible with the data, reducing the need for additional data collection. The Strategy incorporates the Research On Census Alternatives (Beyond 2011) project, an ongoing investigation of administrative data (such as data from electoral registration, state schools, DWP customer lists etc.) which may help produce population statistics without the high cost of a census.

Earlier this year the Government launched a consultation on the Data Linkage Framework. It also commissioned Ipsos MORI, along with staff from the Centre for Population Health Sciences at the University of Edinburgh, to undertake a series of public deliberative workshops to provide better evidence on the public acceptability of data linkage. The findings from both exercises have now been published and can be accessed on the Scottish Government website.

One of the most interesting and unexpected findings to emerge from the deliberative workshops concerned participants' attitudes, not to data linkage, but to the general focus on quantitative data in decision making. There was a view that this leads to the crude categorisation or "labelling" of individuals and groups – for example, as being 'from a bad area' or 'low achieving' or 'criminal' – and subsequently to stigmatisation and discrimination. A reverse effect was also identified whereby individuals or groups who have not being labelled or categorised in a particular way miss out on much needed support or assistance as a result – the example was given of a small impoverished area not receiving financial assistance from government simply because it is not officially classified as one of the most deprived places in the country.

There was some concern that data linkage could exacerbate these problems by creating the potential for labels to carry across sector boundaries and receive wider application. A specific concern was that someone's past involvement with the criminal justice system could become known to various authorities and result in them being placed at the bottom of a housing list or otherwise facing unequal access to services.



These concerns about linkage are largely unfounded as the Strategy is primarily concerned with linking anonymised data for research and statistical purposes, not sharing personal information about an individual between organisations. When the workshop participants were reassured on this point, most immediately became more comfortable with the idea of linkage. Still, their broader concerns about the potentially negative impact of categorising individuals and groups cannot be so easily negated and provide two important reminders to those of us working in social research and policy. The first concerns the inherent limitations of aggregate – and indeed much sub-aggregate – level data analysis in promoting an understanding of individuals' lives, and the importance of remaining alert to atypical patterns of experience and need. The second is the considerable capacity of the public to engage at a sophisticated level with complex policy debate, and to shape that debate by drawing attention to, and questioning, taken-for-granted assumptions and practices on the part of decision makers.

Where are all the cyclists?

13 September 2012

Steven Hope

Ipsos MORI Scotland

The opening lines of the Manifesto produced for the Pedal on Parliament cycle ride in April of this year summed up the 'why' question of cycling promotion.

Cycling should be the obvious solution to many of Scotland's ills. It is cheap, healthy, democratic and convivial, benefits local economies and makes the streets a safer place for all. Cyclist benefit themselves – physiologically their bodies are, on average, many years 'younger' than non-cyclists', and they suffer less from the 'western' diseases that beset Scotland so – and they benefit others, cutting congestion and improving air quality.

OK, it's not as catchy as Marx and Engels' opening to the Communist Manifesto but then encouraging cycling should be more of an opportunity to be grasped than spectre haunting the bourgeoisie.

On the face of it, all the push factors are there – the rising cost of car ownership, the time spent commuting, the need and desire for both adults and children to be more active, slimmer and healthier and the need to save money on local services. But since the Scottish Household Survey started in 1999, the percentage of adults usually cycling to work or education has increased from just 1.8% to 2.5%. You can think of that as a 39% increase over the 10 years but it's still miserably low, even when you compare the best Scottish cities like Edinburgh or Aberdeen, where 7% and 5% of adults cycle to work or education, with the best European cities like Copenhagen (30%) or Groningen (55%).

Even including fair weather commuters and leisure cyclists the total percentage of adults who cycle is 9.9%. Scotland has around 4.3 million adults so if 10% are cyclists then this implies that Scotland currently has around 430,000 cyclists.



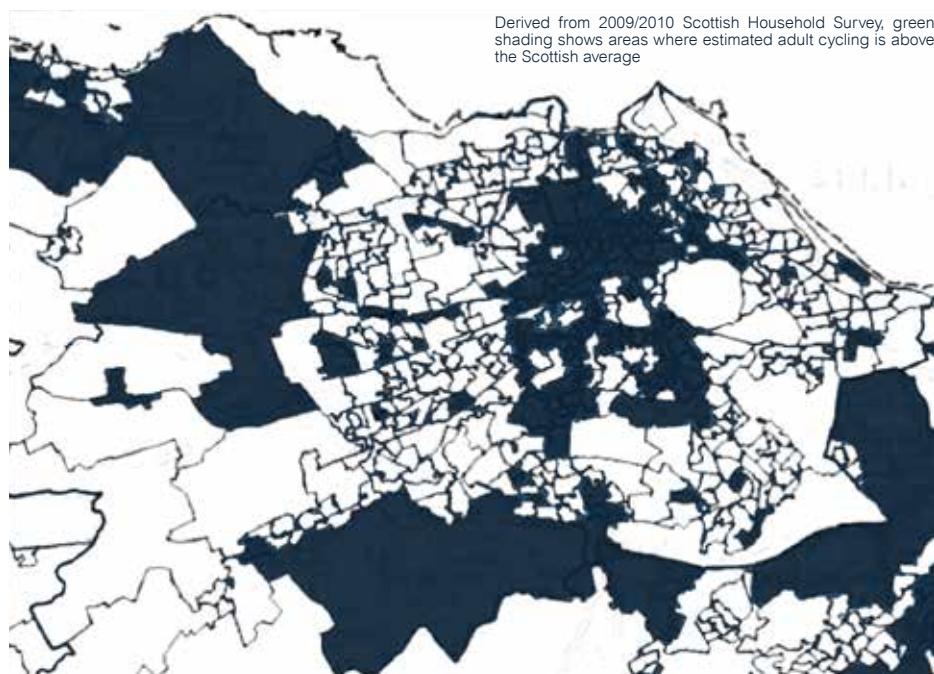
We know where the cyclists are by local authority (Fig 1) and by modelling the characteristics of cyclists we can estimate the distribution of cyclists within local authorities (Fig 2).

FIG 1: CYCLING BY ADULTS IN EACH LOCAL AUTHORITY IN SCOTLAND



Source: Scottish Household Survey 2009/2010

FIG 2: ESTIMATED DISTRIBUTION OF ADULT CYCLING IN EDINBURGH



But how many should there be? Beyond the simplistic comparison that in Edinburgh, for example, 36% of households have an adult bicycle but only 15% of adults cycle, this is a much more difficult question. Answering it involves working out how many people, who are not currently cycling, could become cyclists if conditions were different or they made different decisions. One way to estimate the potential number is to develop an explanatory model of existing cyclists, change the variables and see what happens to the estimated number – a sort of statistical experiment.

The probability of a person being a cyclist is influenced by a complex set of variables that operate at different levels. It matters what local authority you live in, whether your neighbourhood is urban

or rural, affluent or deprived and at a personal level, whether you are male or female, young or old, have children or don't and whether you rent or own your home. Each on its own is quite weakly related to cycling but in combination, each additional variable 'explains' an increasing amount of the variation in cycling. From the data in the SHS we can build a statistical model of the variables that influence cycling.

Changing which variables are put into the model changes the probability that someone will be a cyclist and therefore changes the estimated number of cyclists. For instance, the characteristics of an area can increase or decrease the probability of being a cyclist. If you live in Edinburgh or Moray then, all other

things being equal, you have a higher probability of being a cyclist. If you live in a deprived area, you are less likely to be a cyclist. On balance, area effects tend to suppress the likelihood of someone being a cyclist so removing the influence of these effects increases the estimated number of cyclists to 496,000, potentially increasing the number of cyclists by 17%.

However, removing area effects removes both positive and negative influences. What if we only remove those which have a negative influence? In effect, we're saying 'without changing anything else, what would be the impact on cycling if we made everywhere at least as good as the better places?' The estimate increases to 541,000 or a 28% increase in the number of cyclists.

This is only a model of cycling but it suggests some practical consequences. It suggests that local characteristics suppress demand for cycling; that across the country people with the same characteristics as people who are currently cycling might also cycle if their area levelled up and copied the types of provision found in areas with higher rates of participation. Of course, ask cyclists and they'll tell you that even the best areas in Scotland have much room for improvement. Therefore, all areas could improve on what's already there and aim for Groningen levels of cycling.

Some of our services

SCOTTISH PUBLIC OPINION MONITOR

The Scottish Public Opinion Monitor is a quarterly telephone omnibus offering you access to a high quality, cost-effective survey of 1,000 adults across Scotland. The Monitor is renowned for its accuracy, the speed at which data is delivered and the expertise and insight offered by the team.

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NEED SOME RESEARCH ADVICE?

Translating a research question into a workable methodology can be a challenge - whether it's working out the budget, the best way to collect the data, how to access particular respondent groups, or getting the wording of a questionnaire just right.

We're always happy to help out. So, whether you are at the early stages of designing a big study or just trying to finalise a couple of questions, please get in touch for an informal chat on:

0131 220 5699

or email **David.Myers@ipsos.com**

ACADEMIC COLLABORATIONS

We often work with academic experts. Depending on the research project, university researchers might: subcontract us to undertake a particular element of a research project; be subcontracted to provide a number of days consultancy/advice on their specialist area; or work in close partnership with us to undertake a joint project.

We can provide costs and methodological sections for grant applications. If you want to discuss a possible collaboration, please contact:

Lorraine.Murray@ipsos.com



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