

The first ten years
1995-2005

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Introduction

A slim volume like this can do little more than provide a taster of the scope of the research we have conducted over the past ten years. However, I hope it proves of interest, and that it might contain some surprises for you. As an organisation with a household name, we have to be constantly aware of the adage that we stress to our clients - that perception is truth in the eye of the beholder. One challenge I have faced since taking over the management of MORI Scotland is to overcome the widespread misconceptions of what we do.

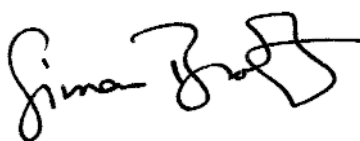
Of course MORI worked with clients in Scotland long before we established a permanent base in Edinburgh in 1995. My first experiences of polling, ten years earlier, were working with the Scotsman - conducting a long-running series of polls that still make interesting reading today. But we were also conducting research into entrepreneurialism for Scottish Enterprise, as well as working for big employers like Shell Expro and BP. Not to mention the first Scottish House Condition Survey that Scottish Homes contracted out, in 2001.

Some of our work has been particularly challenging. We've drawn on the skills and sensitivities of our interviewers in research among recently- bereaved relatives to find out how the medical profession dealt with them during the death of their loved ones. We have pushed interviewers hard and demanded the best in terms of response rates and fieldwork quality to sustain our reputation for conducting studies of the calibre of the Scottish House Condition Survey, the Scottish Crime Survey or the Scottish Household Survey. And we have undertaken detailed analysis to assess the impact and suitability of research methods, most recently in a hugely important study for the Scottish Executive, as we evaluated the switch to telephone interviewing for the Scottish Crime and Victimisation Survey.

Thankfully, the pressure sometimes has an immediate reward, like earlier this year when our telephone research centre in Leith - recently expanded to house over 160 specialist CATI stations - conducted our eve of the General Election poll (for the London Evening Standard) and delivered findings mirroring the final outcome. Elation and relief is a heady cocktail.

In our first ten years we have developed a growing office of research specialists. Our annual turnover is up from around £150K to £2.5 million. We have made a lot of friends and allies in specialist fields who are either clients or partners in our work. Local authorities of the scale of Glasgow and Edinburgh have been good clients, but so too have smaller authorities like Clackmannanshire. We have reported on low-budget qualitative studies, online research, schools-based exercises, and workshops. We have charted the rise of stakeholder research, and the movement of the issue of transport to centre-stage.

What is more, we've enjoyed it. Thank you, and here's to the next ten years!



Simon Braunholtz
Managing Director

Scotland's - digital future

For many people, life with technology is characterised by constant confusion. Just as they master the video recorder, Dixons announce that video is dead. Life is being digitised but digital technologies won't stay still - analogue TV is going the way of cassette tapes, CDs are giving way to MP3s. DVDs, a technology barely out of nappies, will soon be replaced by Blu-ray or HD DVD. Landline telephony is under threat from routing via internet.

The most obvious change has been the transformation of the mobile phone from yuppie status symbol to everyday necessity - not forgetting the hilarious 'rabbit' infancy of course. The mobile market is reaching saturation point, particularly among younger age groups (over 90% of 15-24 year olds use a mobile phone) and is rapidly changing how we use the conventional home phone. In the last three years, the proportion of adults saying they don't have or don't use a landline has trebled (to a third).

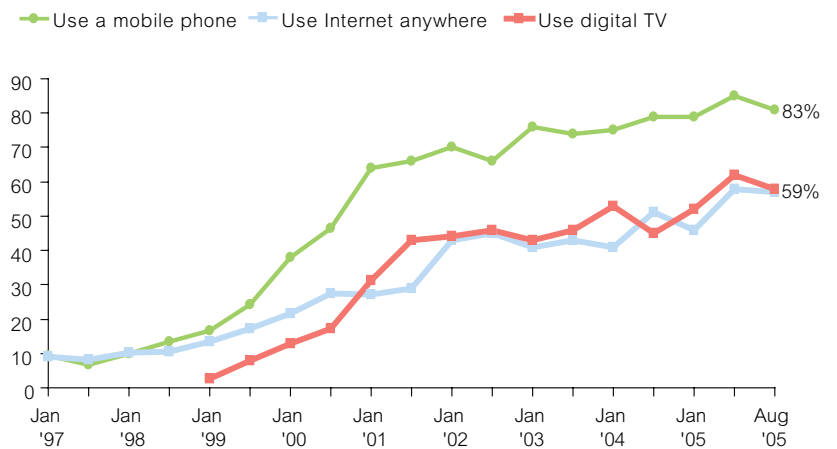
While it becomes increasingly quaint that some people still take photographs on film (and with Kodak winding down film production, that won't last long), the march of technology not only confuses many people, it also shuts some people out.

As the Scottish Household Survey shows, although nearly half of households might have internet access, this is very uneven. In the most deprived areas, only one in five households can access the internet from home.

And the divide is both qualitative and quantitative. In late 2004, home broadband access overtook dial-up for the first time, creating a new divide in terms of the quality of households' internet experience and the content they can access.

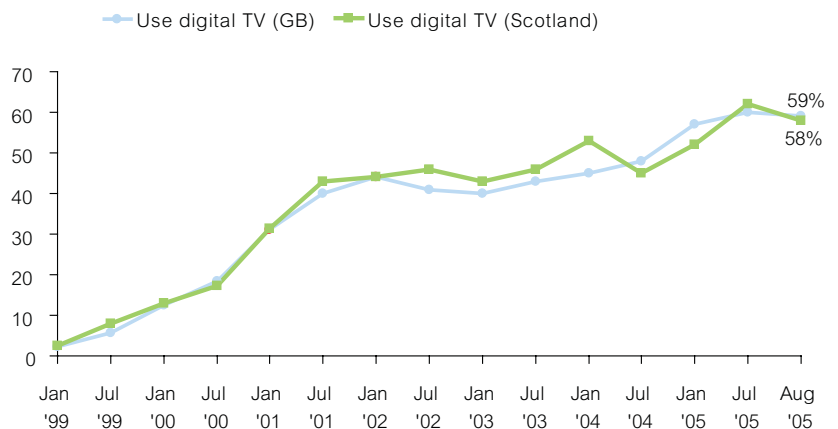
For many homes, digital TV is the next frontier. Over half of households in Scotland now have digital TV and take-up is rising. It is just as well, the Borders will become the forefront of the digital TV revolution in 2008 when they will be the first to switch over. The rest of us will follow soon after.

MORI TECHNOLOGY TRENDS (SCOTLAND)



MORI Technology Tracker January 1997 – August 2005
Base: circa 480 interviews per month, August 2005 c. 540

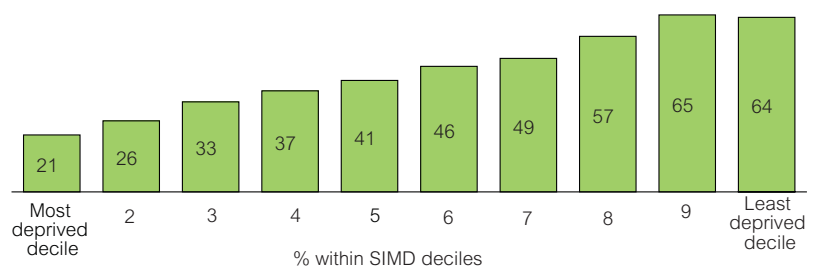
DIGITAL TV USE



MORI Technology Tracker January 1997 – August 2005
Base: GB - circa 4,000 interviews per month, August 2005 c. 6,000 / Scotland - circa 480 interviews per month, August 2005 c. 540, 05 c. 540

ACCESS TO THE INTERNET

Q Does your household have access to the internet from home?



Base: 30,822 households in Scotland, Source: Scottish Household Survey 2003/2004

If technology is taken up with most enthusiasm by young people, the same cannot be said for current affairs. During the 1990s, media speculation and academic debate have been increasingly exercised about the disengagement of young people from political life. Indeed some have claimed a wider problem with people becoming disinterested in politics more generally. Research by MORI does not bear this out, nor does it substantiate claims that young people are 'apathetic', even if they do often lack detailed knowledge and understanding of the processes and institutions of governance.

Most 11-16 year olds do at least look at a newspaper, including a quarter that do so every day. Boys are more likely to say they do than girls, and readership peaks among 15-16 year olds at 32%. But what do they read? Sports and celebrities vie for attention with the headlines, and TV listings, cartoons and horoscopes are more commonly read than 'politics'.

Young people certainly have opinions, even if they don't see voting as the way to express their views. Most are proud to be Scottish. While many also feel we should do more to help people living in poorer countries, a substantial minority feels that there are too many immigrants in Scotland. Few agree with the fatalist sentiment that there is little that ordinary people can do to protect the environment, but fewer still say that this is a common topic of conversation with their friends.

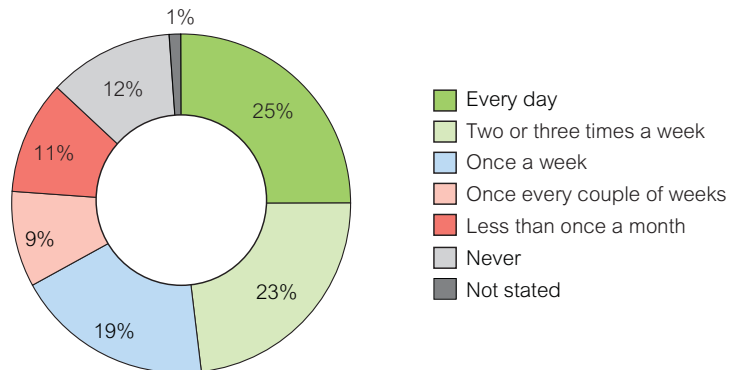
These findings are drawn from the second sweep (2005) of the national schools based study that MORI Scotland conducts jointly with Youthlink Scotland, the national agency for young people.

Other studies that we conduct among young people include Viewfinder 2, for the Youth Services team at the City of Edinburgh Council, and a major longitudinal study of those completing higher and further educational studies, on behalf of the Scottish Funding Councils for HE and FE, examining career and training paths.

Flower of Scotland

MOST LOOK AT THE PAPER - SOMETIMES

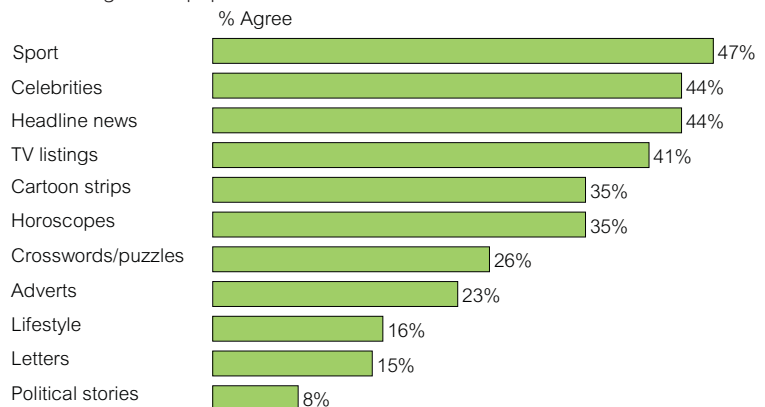
Q How often do you read a newspaper?



Base: 2,150, 11-16 year olds, 31 January - 31 March 2005

BUT 'NEWS' CAN MEAN DIFFERENT THINGS

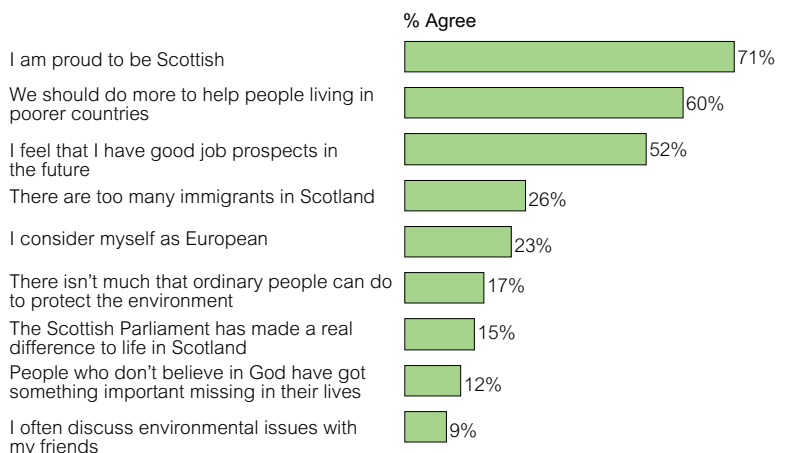
Q Which of the following, if any, do you make a point of looking at, when reading a newspaper?



Base: 2,150, 11-16 year olds, 31 January - 31 March 2005

YOUNG PEOPLE WITH ATTITUDE

Q Please indicate whether you agree or disagree with each of the following statements?



Base: 2,150, 11-16 year olds, 31 January - 31 March 2005

Your most precious resource

Employee research is not for the faint-hearted. It forces managers to confront painful facts about their style and systems of management, and creates expectations among staff that their voices will be listened to. So it is often only the pressure of change that leads organisations to embark on a systematic study of staff opinion.

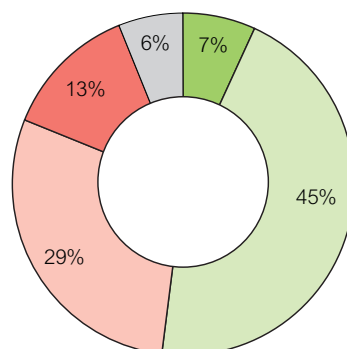
The hiatus caused by local government reorganisation was a good example. Although the new authorities first had to focus on other priorities, by 1999 MORI Scotland was talking to several councils about staff attitude research. One of these was The Highland Council, a new unitary authority covering 10,000 square miles of largely remote and rural Scotland and working to retain some of the identity of the previous councils through a network of local offices, while also instilling a common identity and purpose.

Our first staff survey for Highland revealed issues that needed to be addressed in the local areas, but the most significant issues were the experiences and attitudes of staff across departments. A period of change and reorganisation followed. There was also the considerable impact of the implementation of the McCrone agreement on teachers' pay and conditions. What emerged was an organisation that embraced change, but (the subsequent 2003 survey revealed) did not feel that the reasons for change were well communicated and therefore sometimes that it was poorly managed. Staff valued their line managers, but felt that they were relatively weak on staff development and career planning. These were issues across the Council, but problems of low morale were greater in some Services.

By the third staff survey, in 2005, progress in the weaker services was having a positive impact on Council-wide perceptions of training, appraisal and communications. Much remains to be done, but substantial strides have been taken. Staff research is now embedded in the Highland Council and valued both as a corporate tool, and as a service-level guide for managing change.

KEEPING EMPLOYEES INFORMED

Q Keeping employees informed about issues affecting the whole of the Council and Service issues is very important. Which of the following phrases would you say best applies to The Highland Council as a whole?



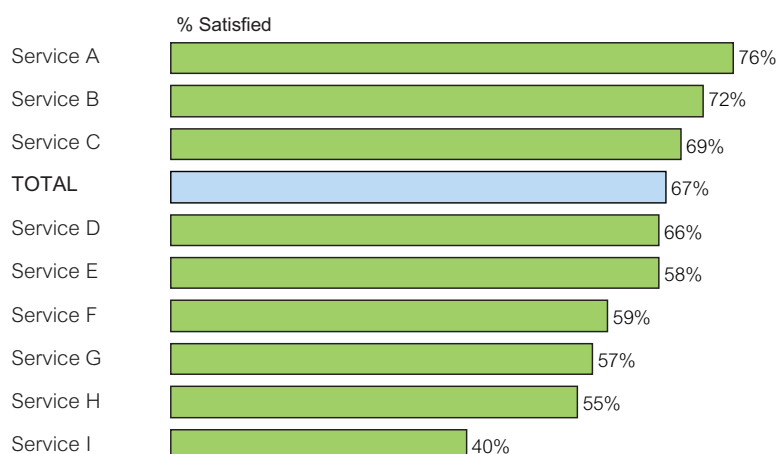
TRENDS	Fully/fairly Informed %	Limited/not much %
2005	52	42
2002	48	45
2000	38	54

■ Fully informed
■ Fairly well informed
■ Limited information
■ Not much at all
■ Don't know

Base: Highland Council Staff (4,588), 6 May -10 June 2005

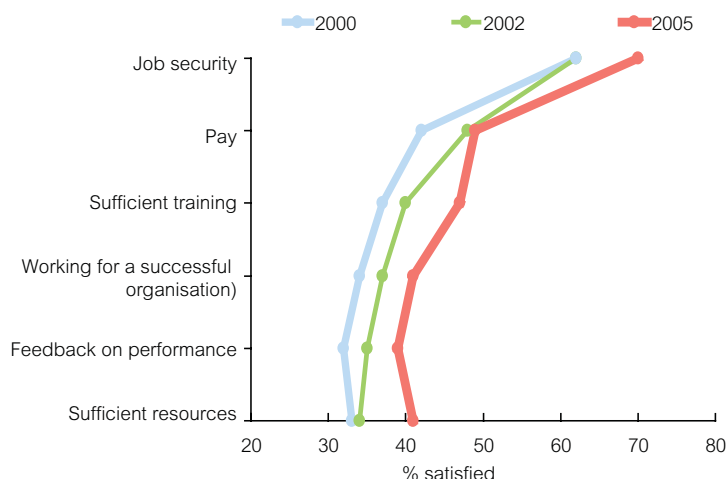
JOB SATISFACTION

Q How satisfied or dissatisfied are you with your present job?



Base: Highland Council Staff (4,588), 6 May -10 June 2005

CHANGING VIEWS TOWARDS ASPECTS OF WORK



Base: Highland Council staff (c5,000 in each survey)

21st century social work review

Social Work Services confront some of the most intractable problems faced by individuals and families in Scotland, and are routinely damned in the media for their efforts. What messages do the public take from this, and from their own experiences of services?

MORI Scotland was commissioned to explore these issues on behalf of the first fundamental review of Social Work since the 1968 Social Work (Scotland) Act.

The research showed that people recognised the day-to-day challenges and dilemmas that social workers face, and felt that demand for services is set to increase because of pressures on families, increased drug use and conflicts between consumer appetites and economic hardships. Many felt that policy should prioritise preventative measures to alleviate some of the pressures that resulted in family breakdown, for example.

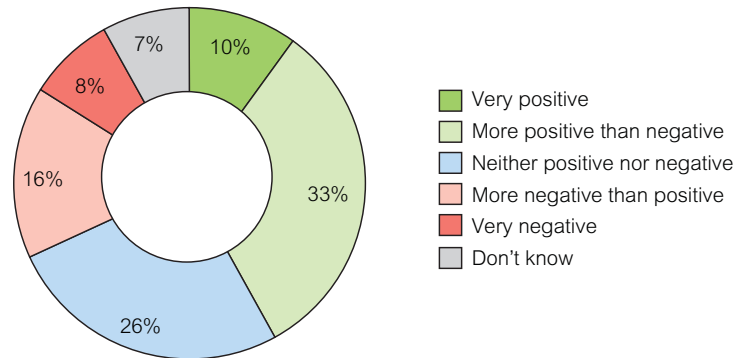
However, there were some notable variations in attitudes, in particular by social class. For example, middle class people, who had often experienced social work services as a support mechanism for elderly or sick relatives, tended to hold more supportive attitudes, being less resistant to early intervention. In some cases, those living in communities where social workers were associated with intervention - perhaps to do with family breakdown or criminal behaviour - there were more mixed views about the merits of intervention. Throughout, there were some interesting contrasts between the level of authority that social workers were considered to have, and the powers that they may require to effectively intervene in fraught social circumstances.

Our reporting, combining a quantitative survey using the Social Policy Monitor, and a series of focus groups, informed the Review Group's thinking, its conclusions and recommendations.

The Social Policy Monitor - Each quarter, we conduct a face-to-face survey among a sample of around 1,000 adults aged 16+, using random probability sampling, and questions scripted on computers (CAPI). Clients requiring statistically robust data for the development of policy are able to participate in the study on a modular basis, with project turn-around time of around 3 months.

GENERAL PERCEPTIONS OF SOCIAL WORKERS

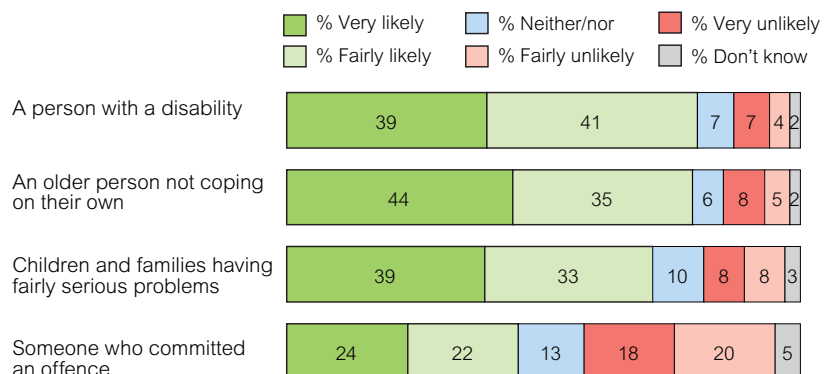
Q Taking your answers from this card, how would you describe your general impression of social workers?



Base: Scottish adults (1,015), 18th April – 19th June 2005

LIKELIHOOD OF USING SOCIAL WORK SERVICES

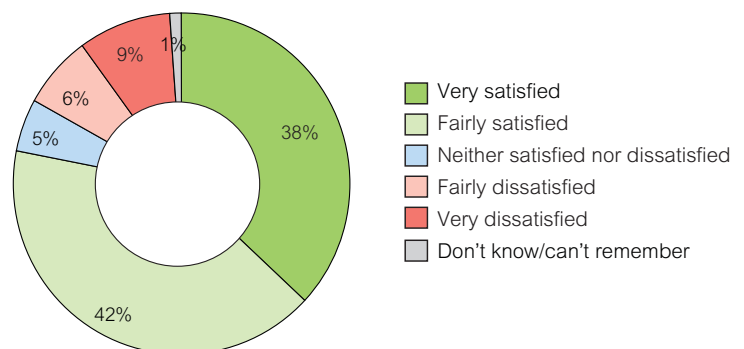
Q If you ever needed help or advice, how likely would you be to approach your local council social work services for ...?



Base: Scottish adults (1,015), 18th April – 19th June 2005

SATISFACTION WITH SOCIAL WORK SERVICES AMONG USERS

Q Thinking about the services used most recently. To what extent were you satisfied or dissatisfied with the service?



Base: All who have used at least one service (454)

Clients stand centre stage

We have experienced huge changes in the past ten years. MORI's growth has reflected the success of specialist researchers in many fields - in corporate communications, financial services, social policy, advertising testing, corporate social responsibility and employee research, to name just a few. Our position as independent researchers, applying knowledge and expertise, has been valued by our clients and resulted in close working relationships.

The result of this growth is that we have been able to sustain our strengths in technologies such as CAPI (computer-assisted personal interviewing), now essential to so much of the work we do but largely unused in 1996 when we piloted it for the Scottish House Condition Survey. Our investment in telephone interviewing capacity has been huge, with the recent doubling of space in our offices in Edinburgh, now one of the largest specialist CATI units in Britain. And in 2004, we conducted over 140,000 'interviews' using online technologies, with a projection that we will do twice as many this year.

You may have read that we recently combined forces with Ipsos, to form Ipsos MORI, reflecting the strength of the reputation our work has generated. We are now part of a company with international coverage, adding specialisms beyond those we have been able to offer our clients in the past. Ipsos, with its headquarters in Paris, is a research agency founded, and still led by, researchers. As such, we share a very similar outlook and set of priorities, and form a complementary match.

For all this growth, our touchstone remains that delivering high quality research and analysis to our clients is central to our past and future success. That is why, as well as showing you a little of what MORI Scotland has been doing over the years, we have asked some of our clients to write a few words about what the past decade has meant for them.



Brian Gosschalk
CEO MORI Group

Scottish Funding Council

Helen Gibson, Senior Policy Officer

Scotland's college and university sectors have seen many significant developments in the past decade. Funding for further education colleges has increased dramatically and there has been much more public recognition of the vital role of colleges in economic development, social inclusion and in helping Scottish learners to achieve their potential. In the higher education sector, despite some concerns in the early 1990s that universities might be driven by policies which didn't take account of the UK and international context, distinctive approaches have been developed which play to Scotland's strengths in areas such as student finance, research collaboration and quality enhancement - while still meeting international standards. Although levels of funding will always be an issue, the Scottish higher education sector faces the future with confidence and with a shared understanding of its major contribution to the cultural and economic life of our nation.

Highlands and Islands Enterprise

Chris Roberts, Head of Communications

The last ten years have witnessed an economic and cultural resurgence in the Highlands and Islands, consolidating the gains made during a period of progress which can trace its roots back to the 1960s.

The area's population has risen by 20 per cent, while the number of people in work is up by 50 per cent. Unemployment rates are regularly below the Scottish average - something virtually unthinkable just a decade ago.

Many ambitious initiatives which were only a dream in 1995 - some of them not even that - are now a reality.

- Lifescan Scotland supplying 1200 healthcare jobs in Inverness
- Thriving Orkney jewellery cluster
- Cairngorm mountain railway
- Broadband access for every community by the end of 2005
- Rapid progress towards creating a university
- An international marine science centre in Argyll
- Growing support for community ownership of land and other assets
- World's first marine energy test centre in Orkney
- Renewed interest and support for Gaelic language and culture
- UK's largest national park
- Dozens of successful music festivals
- A business start-up rate that's higher than the Scottish average

Today's Highlands and Islands has all of these and more.

All of this has its roots in a newfound sense of confidence, a self-belief which will help fuel further progress in the years ahead.

VisitScotland

Philip Riddle, Chief Executive

Tourism is one of Scotland's most important industries, employing around 200,000 people and contributing £4.4bn to the country's economy every year. Impressive as these statistics are, the country's tourism industry - with the support of VisitScotland and the Scottish Executive - believes so much more is possible and is currently striving to grow revenues by 50% over the next decade. Undoubtedly, this will be a challenge. Tourism is one of the most competitive businesses on earth, with around 200 nations all now vying for the travellers buck. It's also an industry that's changed dramatically in the last decade, and will continue to change in future. And to ensure success, Scotland's tourism industry must continually be at the top of its game; alive to what our increasingly discerning customers want, and moreover, able to deliver it. Time and time again, knowing what the modern visitor is looking for is central to achieving Scotland's growth ambitions. In the conventional sense tourism, on a simplistic level, is perceived as being about holidays. However, today's visitor is increasingly looking for more than simply that; they seek an "experience," and Scotland - arguably more than any country on earth - is finely poised to deliver.

Whereas in the past, Scotland, as a visitor destination, would have been known more for its traditional icons - landscapes; whisky; castles etc - the contemporary Scottish experience now encompasses elements such as adventure sports (mountain biking, white-water rafting etc) with the country drawing more and more visitors keen to enjoy "Europe's adventure capital". This niche is also a lucrative one, with Adventure sports tourism contributing around £631m annually to Scotland's economy. Another growth area, increasingly important over the last decade, is the short break market, with the likes of city breaks accounting for 35% of UK visitors to Scotland and 36% of tourist spend.

To capitalise on this growing segment, VisitScotland recently launched a new £1m city breaks campaign, using the allure of our two biggest cities - Glasgow and Edinburgh - to attract visitors from key European markets such as Germany and France. So whether it's whisky and castles, golf or myths and legends; or a more contemporary, urban break, Scotland is capable of offering an experience that will live long in the memory of anyone who visits.

SportScotland

Marney Carmichael, Press Office

One of the major impacts on Scottish sport in the last 10 years has been the introduction of National Lottery funding. Since its inception in 1994, more than £200 million has been spent on all aspects of Scottish sport, from grassroots to elite, including: the Active Schools programme, community sports facilities, elite athlete support, performance coaching and the Scottish Institute of Sport.

HBOS

Alastair Ross, Government & Community Relations Executive, Group Communications

In the past 10 years Scotland has both felt the force of change and been at its leading edge. We have seen a change of government leading to devolution and the creation of a new set of dynamics within Scotland, and two regional UK banks transform themselves into leading international organisations run from Scotland. Change is unavoidable and it is those who adapt to the challenge who will prosper.

Scottish Executive

Diana Wilkinson, Senior Researcher

The accelerated drive for evidence based - or informed - policy in government has transformed social research in the Scottish Executive during the past 10 years. Instead of being in a "Central" Research Unit, most of the 80 or so social researchers are now located within the Executive's seven Departments, working alongside economists and statisticians to provide an integrated evidence base. Other changes have occurred: the creation of the Office of the Chief Researcher responsible for corporate work on public attitudes, communication, and the evaluation of media campaigns; and, most recently, an increased emphasis on knowledge transfer into the Executive. But one thing stays the same - in social research, women still outnumber men by a ratio of over four to one.

Glasgow City Council

David Hazle, Corporate Policy

Local government reorganisation in 1996 saw the abolition of the regions and the move from a two-tier structure to unitary authorities and the creation of new 'quangos'. The change in the funding structure greatly disadvantaged Glasgow, bringing about the loss of 4,000 jobs, while Council Tax levels soared.

Internal change to address the new circumstances, saw the number of Council departments reduce from 22 in 1998 to the 10 integrated services we now have. This was accompanied by a corresponding reduction in the number of directors and senior management.

The past ten years have also seen considerable changes in the way local government conducts its business. The narrow efficiencies of compulsory competitive tendering have been replaced by continuous improvement and "Best Value". Consultation with service users and other stakeholders, previously sporadic has become a staple of modern decision making.

In education, Glasgow has led the way with the largest public private partnership to modernise our secondary schools. In housing, it has delivered the largest housing stock transfer in Europe.

Through the Citizens' Panel and other survey work, MORI Scotland has helped inform the Council's responses to a number of the challenges faced.

Glasgow has been transformed, from the troubled post-industrial city of the 1980s, to the vibrant city it now is, capable of attracting both new investment and tourism in large measure.

Parliamentary views of the Scottish Economy

As far as the economy is concerned, 2001 marked a watershed in the views of Members of the Scottish Parliament. Before then, prospects were seen as good but optimism deteriorated sharply across the political divide only to settle back and remain flat in the past couple of years. The trend might be down since 1999 but Coalition members are much more bullish about the economy than are members of the Opposition in the Parliament.

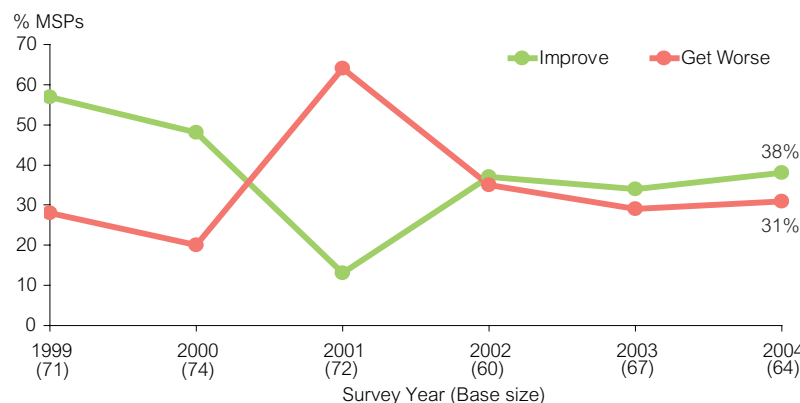
The public's view of their own prospects change slowly, compared with their mood swings about the British economy as a whole. This is one of the key messages from long-term tracking by sector specialists MORI Financial Services, who interview 2,000 adults every fortnight, capturing all the major developments in financial services.

Rising optimism for the economy in the months up to the 1997 General Election quickly turned to deep pessimism, and while there have been periods of recovery, the public across Britain (reflected in Scotland too) has still not recovered a general sense of optimism. However, it was not until the 2001 slump that people considered their own economic fortunes to be at risk. The whole period from 1996 saw the proportion of working people feeling threatened by redundancy decline steadily. For the moment, at least, memories of the high levels of unemployment in the 1980's seem to have faded.

Since the Parliament was established, MORI Scotland has conducted an annual survey of Members, helping us to monitor the standing of our clients and report on key issues from the perspective of MSPs.

PROSPECTS FOR THE SCOTTISH ECONOMY – TRENDS

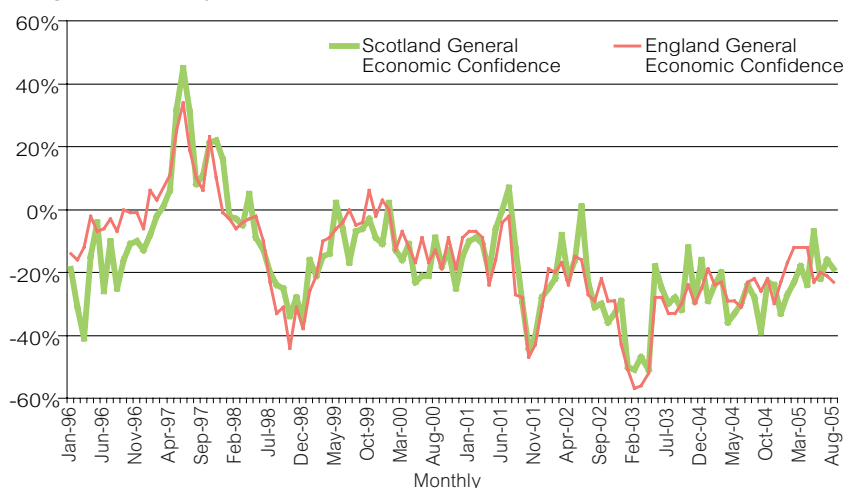
Q Do you think the general economic condition of Scotland will improve, stay the same or get worse over the next 12 months?



Base: Members of the Scottish Parliament (64) 13th Sept – 4th Nov 2004

GENERAL ECONOMIC CONFIDENCE

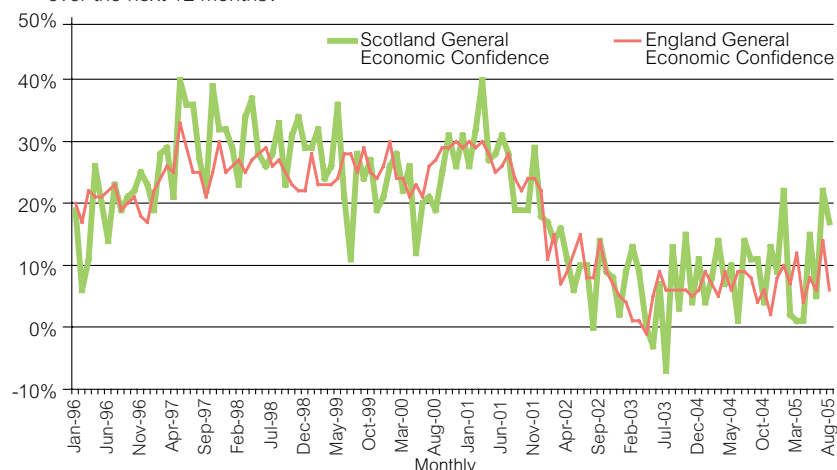
Q Do you think the general economic condition of the country will improve, get worse, or stay the same over the next 12 months?



Base: Around 2,000 members of the general public

PERSONAL ECONOMIC CONFIDENCE

Q Do you think your personal circumstances will improve, get worse or stay the same over the next 12 months?



Base: Around 2,000 members of the general public

The prospect of windfarms being constructed nearby can stir considerable opposition, but those living near existing turbines are generally supportive. This poses a real challenge for those who consider wind turbines to be a significant component in the renewable energy mix for Scotland.

Home to around 20,000 people, Lewis and Harris are among the most remote and windswept corners of the British Isles, as well as having many parts designated Special Area of Conservation (SAC) and Special Protection Area (SPA). The wind makes Lewis and North Harris attractive locations for the largest windfarm development in Europe. On Lewis, plans have been lodged to build more than 230 of the tallest wind turbines in Britain. Each turbine will be 140 metres to the tip of the blade - that's taller than the largest free-standing structure in Scotland (the Glasgow Science Centre Tower), twice the height of the Scott Monument and two and a half times the height of Nelson's Column.

BBC Scotland commissioned us to find out what the islanders think. Virtually everyone had heard of the proposals and either discussed it with others, received information, contacted the Council or their MSP (in other work we have found that windfarms have shot up the list of issues MSPs are contacted about).

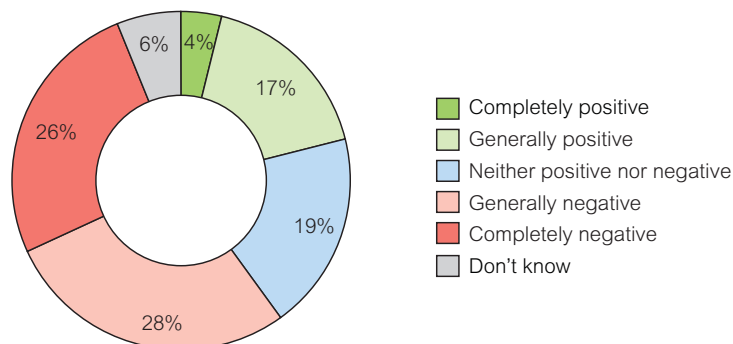
However, the research revealed that most residents opposed the proposed developments. Resistance was stronger when people were asked about the proposed site closest to their home. Only among those who believed they were unlikely to be able to see the turbines or pylons from their home is support more common.

This is an interesting contrast with research that MORI Scotland conducted for the Scottish Executive, among those living close to existing windfarms. This showed that most felt their local windfarm had had no impact, and more felt it had been positive rather than negative. Those living closest tended to be most positive about their local windfarm, even to the extent of supporting expansion.

Windswept Isles

OPPOSITION ON LEWIS

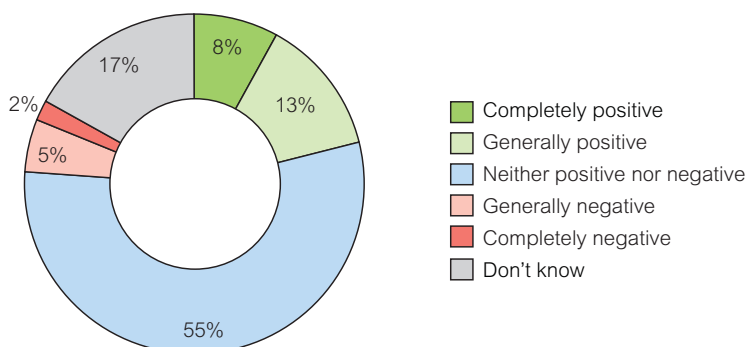
Q What effect, if any, would you say the presence of the windfarm would have on your local area?



Base: 802 adults in Lewis & North Harris, 2-15 February 2005 for BBC Scotland

VIEWS OF THOSE LIVING NEAR EXISTING WINDFARMS

Q What effect, if any, would you say the presence of the windfarm has had on your local area?

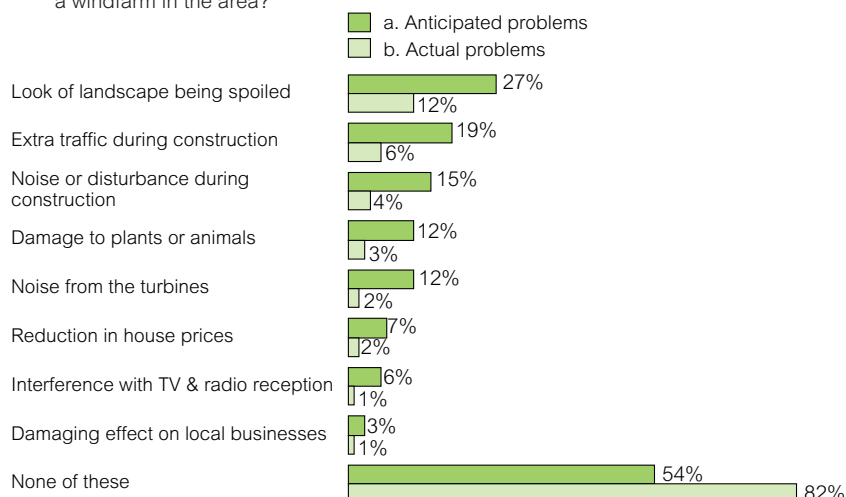


Base: 1,547 adults who live within 20 km of an existing windfarm in Scotland, 27 Feb - 18 March 2003 for Scottish Executive

FEARS NOT REALISED

Qa. Which of the following problems, if any, did you think having a windfarm in the area might cause?

Qb. And which, if any, have actually turned out to be problems caused by having a windfarm in the area?



Base: 1,547 adults who live within 20 km of an existing windfarm in Scotland, 27 Feb - 18 March 2003 for Scottish Executive

Edinburgh has experienced rapid growth and change in the past ten years, largely to the benefit of the city. Unemployment stood at 5.8% in 1996, and has now fallen to 2.3%. In spite of the damaging effect of global terrorism on travel patterns, annual occupancy figures for Edinburgh's principal hotels in 2004 were the highest recorded for seven years (77%), and the airport has expanded massively. New office developments at Edinburgh Park and the Exchange district accommodate over 14,000 employees, and a burgeoning service sector now accounts for some 92% of jobs in the city.

However, this growth has not been without problems. Projections of traffic growth lead the City Council to propose congestion charging (and associated transport initiatives), and in spite of the fact that most residents appear to recognise that congestion in the city has worsened, in February 2005, Edinburgh residents overwhelming voted against the Council's strategy.

Perhaps people have other priorities. Our work for the City Council has highlighted the importance residents set on crime and disorder reduction, as well as environmental improvements, in common with residents in other parts of the country. But improved public transport is commonly mentioned too. Current studies for the Scottish Executive, and for the Council, are exploring some of these issues, and attitudes to congestion charging, further.

Edinburgh sometimes feels as if it hosts a festival for every day of the year. They support over 3,000 jobs and contribute just under £170m to the city economy. At least a third of all festivals tickets are purchased by local people, and our research among residents shows that at some stage most have enjoyed the 'tourist' trail in the city. Even going as far as climbing Arthur's Seat.

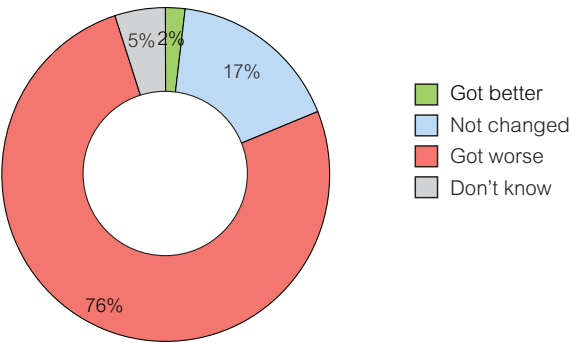
Edinburgh Omnibus - MORI Scotland now conducts a bi- annual survey of residents, comprising around 1,000 face-to-face interviews, to provide a cost effective research vehicle for those wanting to ask several or a few questions'

Capital City

TRAFFIC CONGESTION

Q On balance, do you think each of the following have got better or worse in Edinburgh over the last few years?

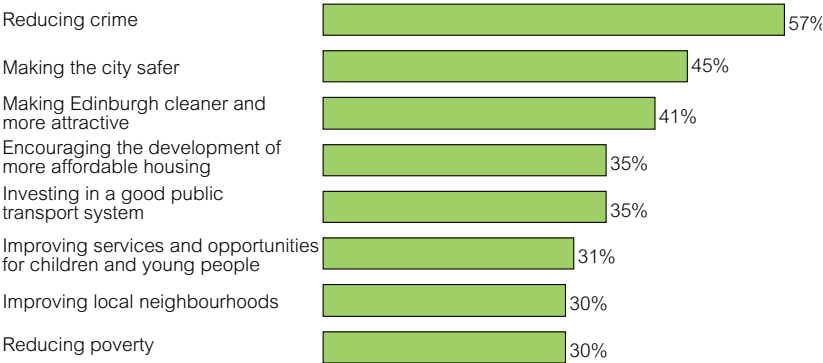
The amount of traffic congestion on the roads



Base: 1,031 Edinburgh residents aged 16+ (27 Sept - 23 Oct 2004, Edinburgh Survey)

IMPROVING QUALITY OF LIFE IN EDINBURGH

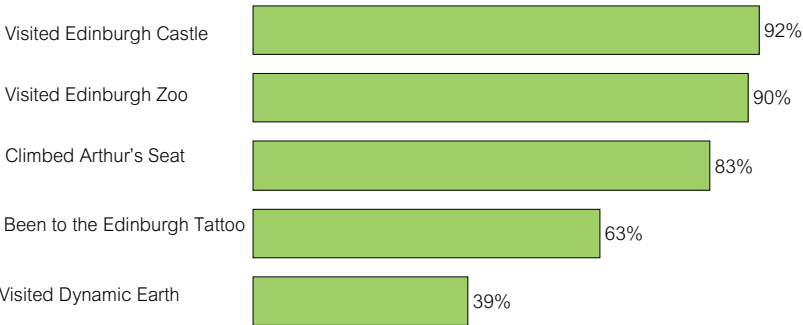
Q Which of these would you set as priorities to improve the quality of life for the people in Edinburgh?



Base: 1,031 Edinburgh residents aged 16+ (27 Sept - 23 Oct 2004, Edinburgh Survey)

ACTIVITIES

Q Have you ever done each of the following...?



Base: 1,031 Edinburgh residents aged 16+ (27 Sept - 23 Oct 2004, Edinburgh Survey)

There's something of a paradox in the public's expressions of support for the Scottish Parliament and their reluctance to engage with it through voting.

It only took two years of Conservative government for public opinion to settle on the attractions of devolution, having rejected it (technically, at least) in the 1979 referendum. By 1981, MORI's polling for the Scotsman was showing around half favouring devolved powers. A broadly similar picture was repeated in subsequent surveys, peaking at 66% in 1996 as the momentum built towards the referendum.

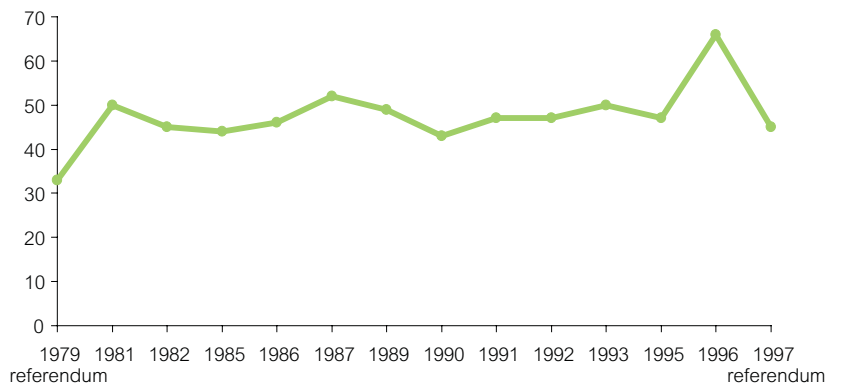
The huge majority for change in the 1997 referendum might have reflected the settled will of those who voted but the Scottish people were more ambivalent. The failed 1979 referendum had, at 64%, a higher turnout than the 60% that voted in the successful 1997 referendum. Turnout held up for the first Scottish Parliament elections in 1999 but by 2003, the second set of elections for MSPs roused fewer than half of voters from their chairs. Our most recent work suggests a similar turnout is likely in 2007, and remarkably little change in party support since 2003.

In spite of falling turnout, the Scottish public remains supportive and optimistic about the Parliament. Indeed, over half of the public agree that the Parliament should be given more powers and, in separate MORI research, only one-third disagreed with the idea that the Parliament had made it easier to make their views known to Government.

How then do we explain the paradox of a population that still seems to cherish the idea of a Scottish Parliament but isn't sufficiently motivated to wield the small blunt pencil in its service?

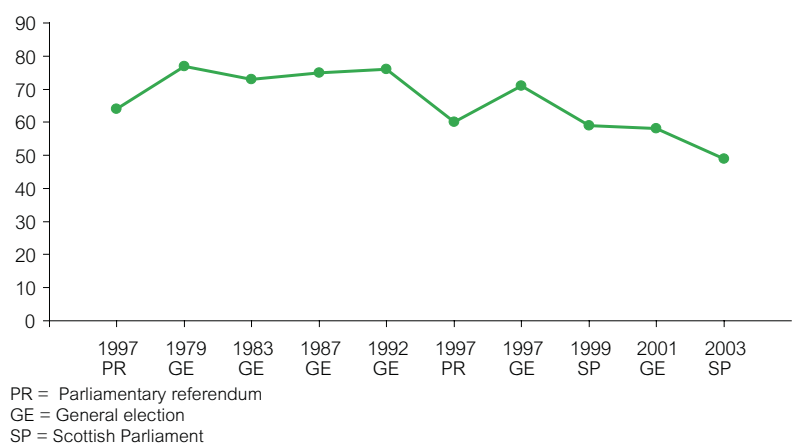
Government. By the people?

SCOTS FAVOUR A DEVOLVED PARLIAMENT



Source: MORI Surveys of Scottish adults except 1985, 1986, 1993, 1995 Source: System 3 Scotland

VOTING GOES OUT OF FASHION



Source: Election turnout statistics from House of Commons research paper 03/59 1 July 2003
UK Election Statistics: 1945 - 2003

MORI Scotland's Clients

Aberdeen University	Gateshead Metropolitan Borough Council	PSSM
ABPI Scotland	GE Capital Woodchester	RGA
Accounts Commission for Scotland	Glasgow Alliance	Richard Irvin Group
Alnwick District Council	Glasgow City Council	Royal Bank of Scotland
Argyle & Bute Council	Glasgow Housing Association	Royal Mail
Arneil Johnston	Good Practice	SCIS
Artisan PR	Grampian Television	Scotland on Sunday
Association of British Pharmaceutical Industries	Greenpeace UK	Scotland's Commissioner for Children & Young People
Audit Scotland	Highlands & Islands Enterprise	Scottish Borders Council
BAA Scotland	Historic Scotland	Scottish Consumer Council
Bank of Scotland	Hobsbawm Macaulay Communications	Scottish Council Foundation
Barna Research Group	Ideas Network	Scottish Daily Mail
BBC Scotland	IFAW	Scottish Enterprise
Berwick upon Tweed Council	Institute of Occupational Medicine	Scottish Environment Protection Agency (SEPA)
Big Lottery Fund	Inverclyde Council	Scottish Executive
Blyth Valley Council	Inverclyde Partnership	Scottish Gas
BP	Johnston Chartered Surveyors	Scottish Legal Aid Board
Bridgepoint Capital Ltd	Lloyds TSB Scotland	Scottish TV
British Energy	London Stock Exchange	Shell Chemicals UK Ltd
BT Scotland	Lothian Buses	Shell Expro
Cambridge Policy Consultants	Lothian Health Board	South Tyneside Council
Camelot Group plc	Lothian Primary Care NHS Trust	SportScotland
Capital City Partnership	Mail on Sunday	Standard Life
Careers Scotland	MARR Associates	Stirling Council
Children 1st Parentline	Midlothian Council	Strathclyde Police
Citizens' Advice Scotland	Napier University	Talkback
City of Edinburgh Council	National Australia Group Europe	Tektra
Clackmannanshire Council	National Consumer Council	The Cambridge Centre
Clydesdale Bank	National Museums of Scotland	The Highland Council
Communities Scotland	NATWEST Bank	The Scottish Parliament
Community & Enterprise Strathclyde	New Economics Foundation	The Sunday Herald
COSLA	Nexus Choat PR	Turner & Townsend Project Management
Craigforth	NHS 24	Unison Scotland
Diageo Scotland	NHS Greater Glasgow	VisitScotland
DTZ Piedad Consulting	NHS Lothian	Wark Clements
Dumfries and Galloway Council	Northumberland County Council	Water Commission
Dunfermline LHCC	Northumberland Healthcare NHS Trust	West Edinburgh Community Planning Partnership
Durham County Council	Northumberland National Park Authority	Xansa
East Ayrshire Council	Northumbria Police Authority	York Consulting Limited
East Lothian Council	Northumbria Probation Service	Young Scot
Educational Institute of Scotland	Ordnance Survey	Youthlink Scotland
Electoral Commission	Organic Targets Bill Steering Group	
ESPC	Oxfam	
Fife Council	Pagoda	
First Drinks Brands	Perth and Kinross Council	
Fraser Associates	Prestwick Airport	
Funding Councils for Further & Higher Education	Protocol Systems	

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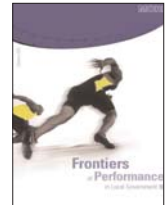
Please take a look below and email your full postal address to mori@mori.com - naming the publication/s you would like. If possible, we will send this to you in electronic format

Publications



Understanding Local Government

reflects the busy local government agenda. Respect, community cohesion and heightened citizen engagement are all included as well as features on two of MORI's new reports: The Importance of Physical Capital: Liveability II and Frontiers of Performance III.



Frontiers of Performance

The latest and most meaningful analysis available of public perceptions around the performance of local authorities.



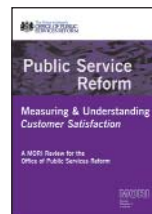
The more things change...

Analyses movements in the issues MORI has been researching over the last 30 years.



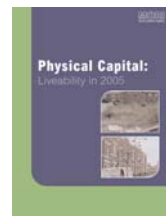
Understanding Society

The magazine from the MORI Social Research Institute, exploring MORI's research and thought leadership in the public sector.



Public Service Reform

This report for the Cabinet Office explores how to measure and understand customer satisfaction.



Liveability in 2005

MORI has revisited the liveability issue — and its analysis is encouraging. Research suggests work by central and local government over the past four years is now being recognised by the public — but there is still a long way to go.



incontext

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