Ipsos MORI
Scotland

IPSOS MORI SCOTLAND AT 20

OUR THINKING

FOREWORD

Twenty years ago Ipsos MORI set up our permanent office in Edinburgh, bringing our expertise and insight to the heart of business, political and social life across Scotland.

During that time Scotland has changed demographically, socially, behaviourally, culturally and politically.

Our population has grown and aged. Our economy has grown and we export more. Average house prices have doubled but we find it tougher to get on the property ladder. We drink and smoke less and we live longer. We recycle more but we are more reliant on our cars. Crime has fallen and we feel safer in our local neighbourhoods. And of course, we now have a devolved parliament whose powers have continued to widen and deepen since 1999.

Throughout, Ipsos MORI has witnessed, measured and commented on the way Scotland has changed. We have worked with clients across all sectors, producing research of the highest quality. While we work in a global research industry, we remain committed to providing innovative, robust and reliable research focused on the distinct needs of Scottish policy-makers and businesses.

In this publication, we bring together a selection of recent articles and thought-pieces we have produced over the last few years, highlighting the range and depth of our thinking, including how we have been at the forefront of innovation in the research industry.

We hope you find it an interesting read on the changes we have seen, and we look forward to working with you to chart the changes over the next 20 years.

Ben Page

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Chief Executive
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PUBLIC SERVICES AND SOCIAL POLICY

Hard work, hard times: the lived experience of in-work poverty

First published in **Scottish Policy Now, Issue 11**

www.scottishpolicynow.co.uk/article/hard-work-hard-times-the-lived-experience-of-inwork-poverty

In July last year, a Scottish Government report revealed that 52% of adults in Scotland living in poverty were from households where at least one person was working; a figure that has been on the rise over the last two decades. It is little surprise then that 'in-work poverty', as it is commonly termed, has been the subject of considerable recent discussion and debate. What is surprising is the lack of primary research undertaken on the topic to date. Granted, a number of commentators have sought to analyse the reasons for the phenomenon or made recommendations as to how it might best be tackled, but there has been comparatively little work looking in detail at the experiences of those in the situation that might provide for genuinely evidence-based solutions.

Mindful of this, the Glasgow Community Planning Partnership (CPP) commissioned Ipsos MORI Scotland to interview a sample of the city's affected residents with a view to identifying the range, scale and depth of issues that they were facing. The findings were eye-opening and confirmed that having a job is no longer a guarantee of avoiding poverty.

Virtually all of those we spoke with were experiencing levels of hardship more often associated with worklessness. It was common for them to sum up their day-to-day existence as "a struggle" or to make such comments as "every penny is accounted for every month". Many participants went further, saying that they were simply not managing to make ends meet and had effectively reached crisis point. Irrespective of the severity of their situations, it was clear that the combined cost of housing, fuel and food bore heavily on them.

Indeed, they were often faced with difficult trade-offs between, for example, paying their rent on time and heating their homes, or topping up their electricity meters and buying food. Several of those we spoke with described how, towards the end of the month especially, they routinely had to borrow money to pay for food or resort to eating only discounted or very basic produce such as dry pasta and toast.

It should come as no surprise then that very few of the participants had savings that they could fall back on, leaving them vulnerable to the effects of unexpected financial shocks, like an essential household repair, and further reliant on borrowing as a means of getting by. Almost all had at least some outstanding debt. Sums citied typically ranged between c£3,000 and c£10,000 though those in the greatest difficulties were often reluctant to disclosure the full extent of their borrowing.

In term of other impacts of in-work poverty, the majority of those we spoke with said that they (and in some cases their partner) were suffering from stress and/or depression as a direct result of the strain they were under. A similar proportion referred to tensions or relationship difficulties that had arisen in their households over money.

So, what did the research tell us about strategies for tacking in-work poverty? First and most fundamentally, it reinforced calls to maximise incomes through the payment of a Living Wage and other positive employment practices. Most of those we spoke with were earning around the level of the National Minimum Wage; sometimes in zero-hours contracts where their hours (and thus incomes) were uncertain from week to week.

Secondly, it confirmed the need for measures to ensure that people are progressively better off in work than they would be on benefits – in other words, that it always pays to work. Participants working part time often commented that it was not worth their while increasing their hours because the extra income they would receive would effectively be cancelled out by loss of Working Tax Credit. The new system of Universal Credit has been designed to address such instances but commentators have argued that more still needs to be done. Lawton and Thompson, writing for the Rowntree Foundation , for example, have called for a second-earner disregard in the new system of Universal

Credit which would allow a second earner a certain income before Universal Credit is withdrawn.

Thirdly, the research underscored the need for increased provision of affordable childcare. Several of the parents we interviewed were working part time because they could not afford full-time childcare: one commented that care for his three children would cost more than he and his wife earned. In the current economic climate a move towards cheap universal provision is unlikely, which has prompted Bell to argue that, in the meantime, consideration should be given to expanding before and after school provision as this may be cheaper than creating additional childcare places for younger children.

Finally, the research highlighted a need to ensure that people are aware of the range of benefits and other forms of financial assistance available to them – including Discretionary Housing Payments and Crisis Grants – and of local advice and support services; particularly debt advice services. Several participants had approached their local Citizen's Advice Bureau for debt advice with each describing the experience in very positive terms.

> ...the majority of those we spoke with said that they (and in some cases their partner) were suffering from stress and/or depression as a direct result of the strain they were under

The Glasgow CPP and Poverty Leadership Panel has already begun implementing measures such as those outlined above. If, as seems likely*, the issues we found in the city are replicated elsewhere, other local partnerships would do well to follow suit.

Ipsos MORI's full report on in-work poverty in Glasgow is available on the Glasgow Community Planning Partnership website.

*Data from the Scottish Household Survey (SHS) suggests that although the rate of in-work poverty in Glasgow is slightly above the Scottish average (at 8% compared with 6%), it is lower or in line with that found in several other local authority areas, including Dundee, Aberdeen and Fife.

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Power to the people

First published in **Scottish Policy Now, Issue 8** on **January 2014**

www.scottishpolicynow.co.uk/article/power-to-the-people

For years it has been argued that democracy in Britain is in crisis; participation rates in elections are falling, mistrust of politicians is rising and the public seems less connected with the political process than ever before.

This argument applies to local government in Scotland as much as to any other layer of government in Britain and partly explains why CoSLA [the Convention of Scottish Local Authorities] took the lead in setting up the independent Commission on Strengthening Local Democracy at the end of 2013.

The Commission's purpose is to identify how a shift in power to local democracy in Scotland can be achieved, regardless of the result of September's independence referendum, including how the current arrangements for delivering local services can be 'strengthened and enriched to benefit local people most.'

Making local democracy more accountable and beneficial to citizens will not be easy. A recent survey Ipsos MORI conducted to inform the work of Commission clearly highlights the scale of the challenges ahead.

There are a number of findings from the survey which illustrate the problems; firstly 6 in 10 adults told us that they do not feel part of how decisions which affect their community are made, an opinion that is shared among those of all ages and from deprived and affluent neighbourhoods alike. This detachment from the current landscape is reinforced with the finding that fewer than half of adults (44%), and only a third of young adults (34%), feel clear about who makes decisions about how local services are delivered in their area.

Many people also see local government as too remote and increasingly irrelevant; the majority of us (60%) believe that decisions about public services are taken too far away from where we live and more than half of us (54%) think that central government controls more decisions about local decisions than it did in the past, both of which we view negatively.

But while the challenge of reimagining local democracy may be considerable there are some reasons for the Commission to feel optimistic. There are signs from the survey that, not only does the public support change to the current arrangements, many would like to have some involvement in improving the quality of life in their community.

Indeed, the vast majority of people (82%) agreed with the statement that they would like more say in how services are provided in their neighbourhood (42% strongly agreed). And this desire to have a say in service provision is equally strong among those in Scotland's most deprived communities (83% agreed) where it is often assumed that people feel more disengaged and less willing to participate. Furthermore, more than three-quarters told us that they would get more involved in their local community if it were easier to participate in the decisions that affect it, a figure that rose to 87% among those living in the most deprived neighbourhoods in Scotland.

What should we make of these findings and what should the Commission do next? While it is encouraging to see such enthusiasm for citizens to be engaged in improving their communities, the reality of getting people out to a community centre on a wet Tuesday night in February may be more difficult. To counter this participation should be encouraged by making it easy and accessible, offering different methods of engagement to suit the needs of different people, and by giving people a clear understanding of what is expected of them and what positive impact they could potentially have. It will also be important to ensure that new forums established for local people to influence decision-making are not dominated by an unrepresentative group who pursue narrow agendas.

For the Commission to make the most of these initial findings and explore how these encouraging signs could become reality, more in-depth qualitative research would be helpful. This would help in understanding how citizens would most like to participate, explore barriers to participation in greater detail and tease out what power citizens expect to have in order to ensure that their views are heard and acted upon.

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Public service reform and public opinion

First published in **Scottish Policy Now, Issue 5**

www.scottishpolicynow.co.uk/article/public-services-reform-and-public-opinion

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 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.

> When it comes to public services, the strength of public opinion in Scotland opposed to radical change becomes clearer

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.

> Any move 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

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Small area estimates II – Child Poverty Data

First published in **Ipsos MORI Scotland Newsletter** in **Winter 2011**

www.ipsos-mori.com/Assets/Docs/Scotland/SRI_Scotland_Newsletter_Winter2011_Small_Area_Estimates_II-%20Child_Poverty_Data.pdf

In our last newsletter we outlined recent work developing local area indicators using data from the Government's large scale social surveys but there is also an increasing amount of data being published at local area level. This is important information for three reasons:

- it allows us to see the actual geographical pattern of issues rather than rely on assumptions about how problems are distributed
- it allows us to check our modelling methods against real data to assess how well the areas highlighted by modelling match the areas highlighted by the data
- it allows us to assess current prioritisation mechanisms.

It does all these things provided we have a way to look at the data – analysis software, mapping software and the base maps and digitised boundaries that bring the data to life and show, on the ground, where these issues can be found.

The publication of child poverty data for Scotland at datazone level (an average of about 300 households) is a good case in point. The data – a snapshot of 31 August 2009 and published by HMRC in September 2010 – shows that on average 19% of children in Scotland are in poverty and this ranges from 1% to 87% of children across individual datazones.

As it is published, the data is difficult to use. It is simply a list of Scotland's 6,505 datazones and the associated numbers of children and families. I have no idea where S01003463 is but I can see that 87% of the children are in poverty.

When we map the data (using free Ordnance Survey maps made available under the Open Data initiative and digitised datazone boundaries available from Scottish Neighbourhood Statistics) we can pick out the areas with higher than average levels of child poverty and see precisely where they are.

Figure 1 shows the areas in Edinburgh with above average levels of child poverty. Much of it is as we might expect – high levels in the south of the city around Craigmillar, Gilmerton and Kaimes. Also in Leith, Pilton and Muirhouse. But who would have expected the entire corridor from Dumbiedykes through the city centre, and out to Wester Hailes? What is that small group of datazones around Colinton and Fairmilehead and the small area north of Corstorphine?

Once we can see the areas mapped we immediately have a picture of the areas affected, which often throws up surprises.

What does child poverty tell us about modelling?

Intuitively we would expect child poverty to be closely related to areas with low average incomes. Official income estimates are not available for local areas but we can model estimates from national surveys like the Scottish Household Survey and compare these with child poverty data and other indicators such as the income measures used to construct the Scottish Index of Multiple Deprivation (SIMD).

As expected, child poverty is strongly correlated with area deprivation, with the percentage of children in poverty increasing as area deprivation increases (r = 0.87). Child poverty is also strongly correlated with the income domain used to construct SIMD (r = 0.86).

Most importantly, in terms of being able to use the SHS as a source of data for local area modelling, the official child poverty

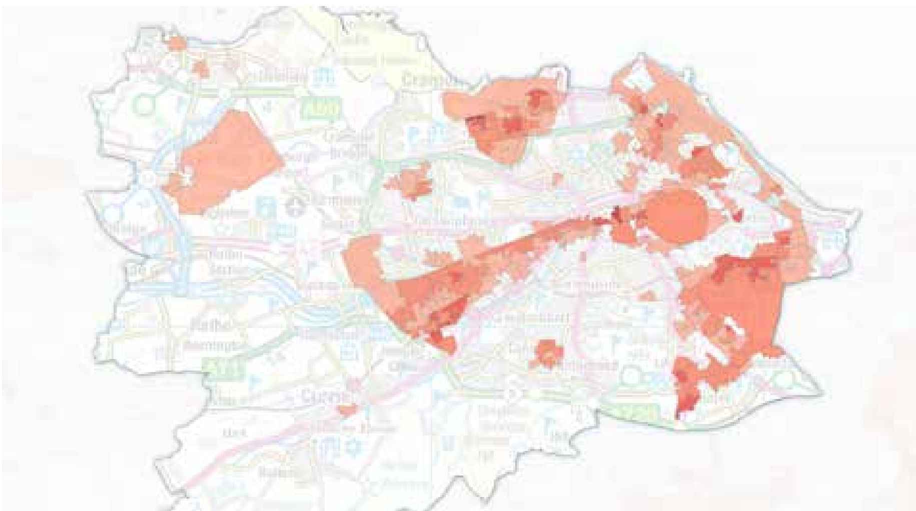

Figure 1: **Child poverty in Edinburgh**

measure is strongly correlated with our estimate of the percentage of households containing children but no working adults in each datazone (r = 0.84).

This suggests that modelling from surveys like the SHS can provide a good indicator of issues at a very local level.

How is child poverty related to indicators for area prioritisation?

A correlation of 0.86 suggests that the general measure of area deprivation is a good basis for identifying areas that have the specific characteristic of having a high prevalence of child poverty. However, comparing the two and looking at the gaps – the areas where the two do not coincide – can highlight areas that area-based policies might miss. Figure 2 shows the red areas of high child poverty overlaid with the areas in Edinburgh that are among the 15% most deprived areas of Scotland. This shows rather starkly that while there is considerable overlap between child poverty and area deprivation, especially around the areas we might expect, that central corridor of high child poverty would be missed by area strategies that focused on the 15% most deprived areas.

New sources of data offer exciting possibilities for analysing issues and, combined with analytical techniques that can squeeze value from the large social surveys, offer better insights and improved methods for targeting policies. Faced with new financial realities of reduced spending and more focus on prevention, the ability to identify communities in need is an important tool for researchers and policymakers.

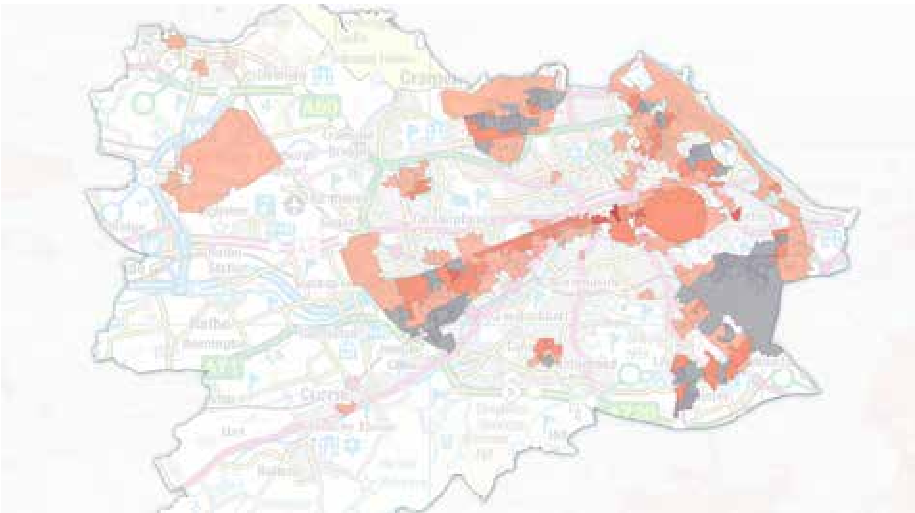

Figure 2: **Child poverty and area deprivation in Edinburgh**

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Perils of perception: 10 things people think about housing

First published in **The Chartered Institute of Housing** on **July 2015**

www.cih.org/news-article/display/vpathDCR/templatedata/cih/news-article/data/Perils_of_perception_10_things_people_think_about_housing

Back in 2013 we researched what people in Britain knew about the basic make-up of their country and the scale of key social issues. We found that they are often very wrong – for example, over-estimating the extent of immigration, teenage pregnancy and welfare fraud.

We repeated the study across 14 countries last year and found this wasn't a peculiarly British phenomenon. Then, back home, we published new research this week on financial issues, finding that it's the cost of the big life events – like having children, going to university and retiring – that we underestimate.

On behalf of the Chartered Institute of Housing, we used some of this new data and reviewed several existing sources dating back to 2009 to identify 10 important perceptions - and in many cases misperceptions - relating to housing:

1. There is a strong sense of housing crisis

In January this year 76% of British adults agreed that there is "a housing crisis in Britain" but only 46% thought the same applies to their local area.

2. The extent of owner-occupation is under-estimated

In 2012 only 28% of the public correctly thought that two-thirds or more of British adults were owner-occupiers.

3. People are pretty accurate in terms of the average UK house price

The average answer given last month was £190,000, close to the true cost of £194,166.[i] There are large regional differences here though; 29% of Londoners think the average UK price is over £300,000, a likely reflection of the high prices in the capital.

4. They under-estimate the extent of house price rises (depending on the measure)

Again last month, and on average, people think prices rose 3% over the previous 12 months (having been given Halifax's May House Price Index as a benchmark). According to Halifax, the real change was 11%.[ii]

5. They significantly under-estimate the average up-front deposit put down by a property buyer in Britain

The average given was £20,000, less than a third of the £72,000 actually required.[iii] Only 1% suggested a figure between £70,000 and £79,000.

6. They think that the upper income thresholds for intermediate housing options (like shared ownership) are much lower than they actually are

Asked in 2009, potential customers of intermediate housing in London thought the ceiling, on average, to be £25,000, much lower than the real (at the time) £60,000.

7. Rent levels outside London are under-estimated

The average private sector rent outside London in England and Wales is £761, higher than the public's £600 average (covering all rents). For London, the equivalent was £1,166, a little higher than the public's average estimate of £1,000.[iv]

8. The scale of social housing is over-estimated

A survey for #HousingDay in 2014 found that, on average, English adults think that 39 out of 100 of their contemporaries live in social housing, more than double the real figure of 15.

9. New builds are considered to be more expensive, and smaller than existing homes

Just under half of British adults think that new builds are at least 6% more expensive than comparable second hand property, while other research has found a perception that they are smaller.

10. The extent to which the country is already developed is over-estimated

Two-thirds of English adults think a quarter or more of the country is already developed (described as already built on). The real figure is 10% or less depending on definition.[v]

So while people recognise the housing crisis, they are unaware of the scale and nature of many of its key features. They are fairly accurate on house prices, but are unaware of the scale of the different tenures as well as under-estimating the affordability gap. In some cases the public don't know how bad the state of housing in Britain is, in others, perhaps, how good some of the solutions might be.

This matters to those interested in, among other things, expanding home ownership or increasing housing supply. Research points to social norms influencing behaviour – and in the housing sphere, for example, people's assessment of situations might shape their propensity to buy or sell property, take on mortgage debt, buy new-build properties or consider shared ownership. As well as having significant ramifications for the market, perceptions could shape people's receptiveness to policy.

There are likely to be all sorts of reasons why what people think is the case differs from reality. For example, errors will be influenced by information and impressions from a number of sources, and some explanation is likely to be found in our 'emotional innumeracy'; our inaccuracies are shaped by what is worrying us – we believe what we want to.

I think the message for the housing industry is that we need to better understand the context to attitudes and behaviours, and try harder to achieve clear, consistent and compelling communications.

> While people recognise the housing crisis, they are unaware of the scale and nature of many of its key features

[i] Source: The average figure for May 2015 is £195,166. Data are drawn from Nationwide's house purchase mortgage lending at the post survey approvals stage. Data are also seasonally adjusted. N.B. there are multiple measures of house price averages.

[ii] Source: Halifax HPI (April 2014-April 2015). Again, there are multiple measures of house price averages (and some record smaller rises of 3-4%).

[iii] Source: Mortgage Advice Bureau.

[iv] Source: LSL Property Services Ltd.

[v] See http://www.bbc.co.uk/news/uk-18623096

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Build, build, build (but don't forget quality)

First published in **Shelter Policy Blog** on **June 2015**

blog.shelter.org.uk/2015/06/guest-blog-build-build-build-but-dont-forget-quality/

During the general election one of most striking Ipsos MORI poll findings was 69% of Britons agreeing that "unless we build many more new, affordable homes we will never be able to tackle the country's housing problems."

The backdrop to this is one of most remarkable shifts in public opinion in the past five years. In 2014, according to the British Social Attitudes survey, 56% of English adults supported the building of new homes locally, double the proportion in 2010.

The housing crisis is recognised by most, and felt by many. While there are different policy solutions to increasing the volume of new homes and these rightly command attention, we shouldn't lose sight of the issue of what should be built. This is because that softening 'anti' sentiment, while welcome, is also likely to be very conditional. In the past few years we have polled for several local authority and developer clients and our surveys have detected significant swings in opinion on supply depending on the proposition and its implications – building on brownfield, greenfield, location, affordability, infrastructure, community benefits etc.

There are also numerous design aspects. For example, demographic change means that we must surely cater better for older homeowners and renters – an issue covered in the excellent Demos report *Top of the ladder*. Another challenge comes in the form of the image problem that new builds have; the public see them as more expensive and smaller than existing, comparable stock. We saw first-hand how poor design and space blights lives in our research for RIBA in 2012.

For Berkeley we asked Londoners to trade off quantity and quality in respect of new housing supply and, in 2013, quality edged it, while our polling for New London Architecture found Londoners more likely to agree than disagree that tall buildings have made London "look better", but they would much rather work in them than live in them.

Most recently, our polling for Create Streets found that unpopular types of housing can sharply decrease support for building new homes – reducing this by 64% – while the most popular housing would appear to be the most conventional in form, style and building materials. The research also highlights differences in tastes; for example, those living in London, and renters, are *relatively* more favourable towards the less traditional-looking developments.

Of course, all housing is local, and this requires careful management especially when opinion is more 'Maybe to homes' than outright 'yes' or 'no'. Beauty is in the eye of the beholder, but there is such a thing as consensus.

> "…unpopular types of housing can sharply decrease support for building new homes while the most popular housing would appear to be the most conventional in form, style and building materials

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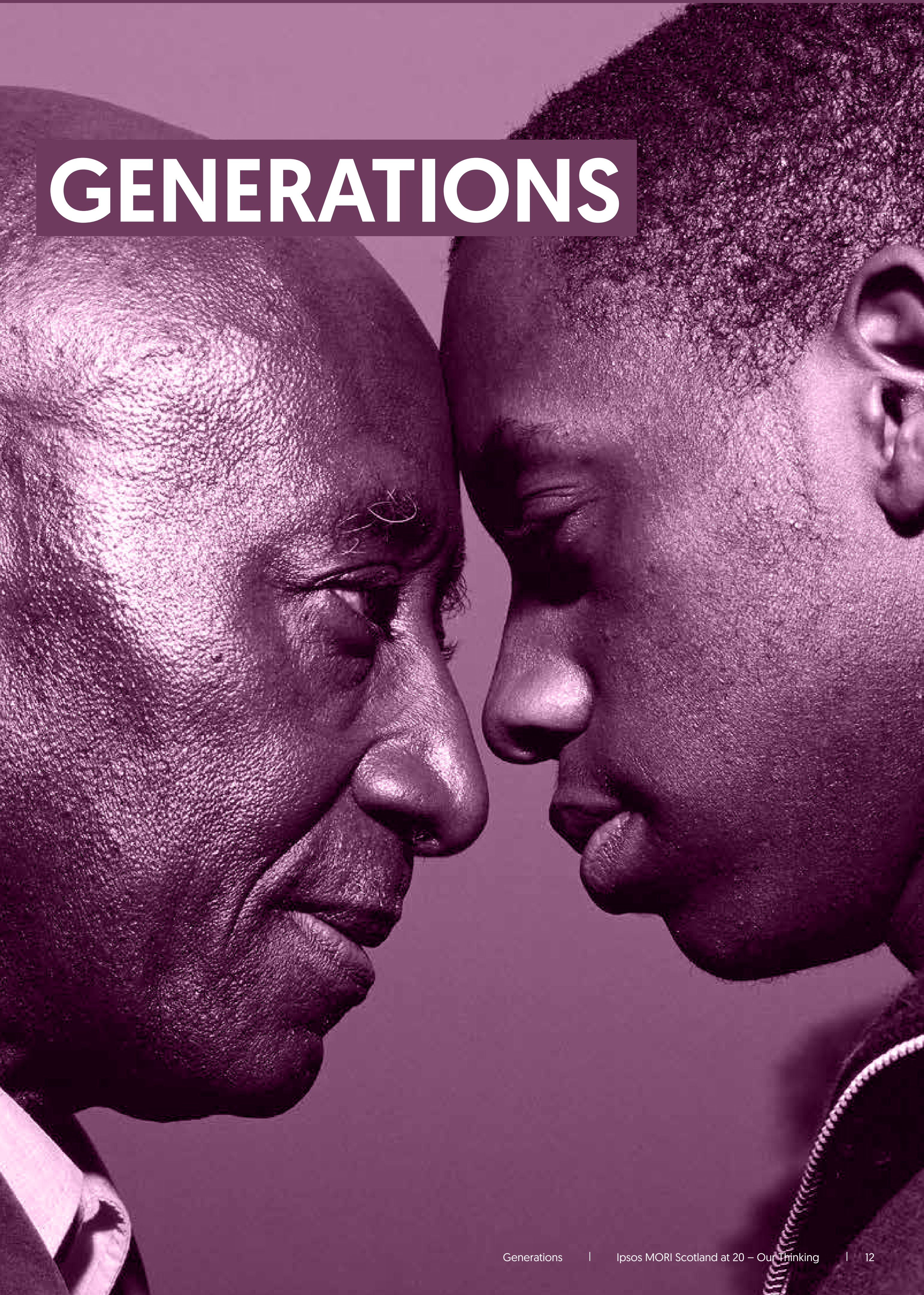
GENERATIONS



Running to stand still – public attitudes and population change

First published in **Ipsos MORI Scotland Newsletter** in **Winter 2013/14**

www.ipsos-mori.com/_emails/scotland/approach/winter_2013_14/sri_scotland_newsletter_approach_winter2013_14.pdf

Trends in public attitudes rarely give explicit consideration to the effects of population change and generational differences in opinions. Analysis of the British Social Attitudes Survey by colleagues in London has started to unravel the links but data for Scotland shows similar patterns.

The Churchillian idea that views moderate over time – that the radicalism of youth is replaced by elderly conservatism – has been an unspoken feature of the analysis of public opinions about services in Scotland. Age-related variation in how people rate services has been noted but the consequences and the reasons remain largely unexplored. Older people, it is assumed, have lower expectations. They're easier to please. However, generational analysis, paralleling work undertaken by Ipsos MORI colleagues in London, suggests that the differences in opinion do not lessen over time. Within trends that show rises and falls over time, the young remain more dissatisfied than the old. This has profound consequences for public service providers.

We define the generations by the cohort they were born into: the pre-war generation born before 1945; the post-war 'baby boom' generation born between 1945 and 1965; Generation X, born between 1966 and 1979; and Generation Y, born since 1980.

An important feature of the generations is their changing contribution to the adult population and, as a consequence, their contribution to survey samples of adults. Over recent years, the pre-war generation has gradually declined from over 30% of adults in 1999 to around 20% ten years later. Younger generations increasingly make up a larger share of the population, with Generation Y now accounting for over 20% of adults, up from almost zero in 1999, as Figure 1 shows.

The four generations have very different views across a wide variety of topics and, broadly speaking, there is a consistent pattern: younger generations are less positive than older generations and the size of the gap is fairly consistent. For example, the younger generations show less engagement with

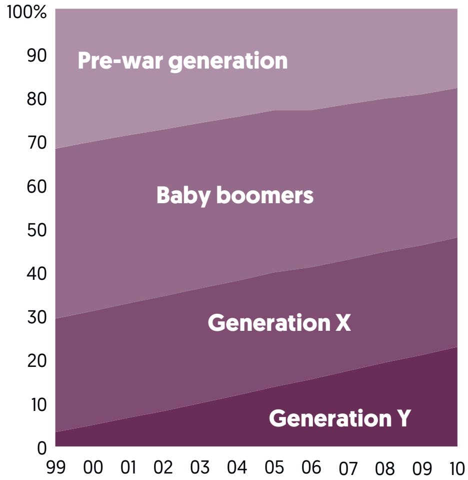


Figure 1: **The changing generational structure of adults in Scotland (%)**

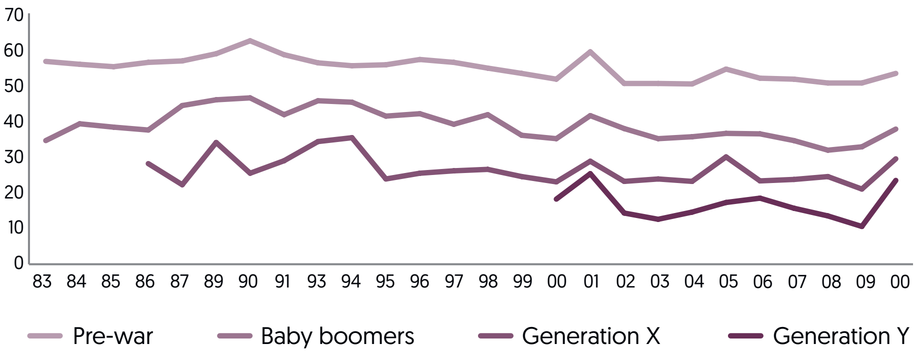


Figure 2: **Party identification across the generations (%)**

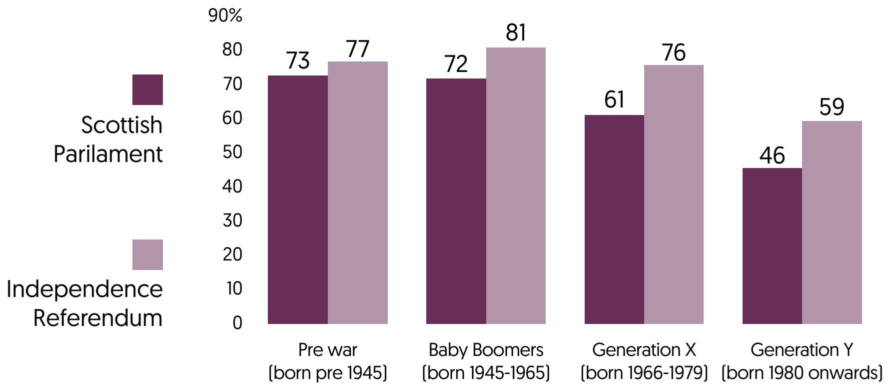


Figure 3: **Likelihood of voting in independence referendum and Scottish Parliament elections (%)**

political debate and are less likely to support a political party (Figure 2).

In Scotland, nearly 20 percentage points separates the youngest and older generations in terms of their likelihood of voting in the independence referendum and there's nearly a 30 point difference in likelihood to vote in the Scottish Parliament elections (Figure 3).

The younger generation also shows lower support for, and tend to be less satisfied with, public services. The chart below shows the level of satisfaction with their neighbourhood among social rented tenants in Scotland.

When we combine the underlying shift in the composition of the population (Figure 1) and the differences in how each group responds to questions on issues of public policy, such as Figure 4, we start to see the consequences for public service providers. On the measure above, the steady increase in the percentage rating their neighbourhood as a very good place to live among all groups is substantially dampened by the increasing proportion of social rented tenants coming from the two younger and least satisfied generations, leaving the aggregate trend pretty flat overall.

In essence, the decline of the (more engaged, more satisfied) pre-war generation and the rise of the (less engaged, less satisfied) younger generations suggests an inevitable slide in aggregate measures of performance derived from public surveys – or at the very least that service providers will be running to stand still. For analysts looking at data on public satisfaction this highlights the importance of looking behind the headline figures at how satisfaction varies across the population and where improvements need to be targeted to have an impact on overall satisfaction.

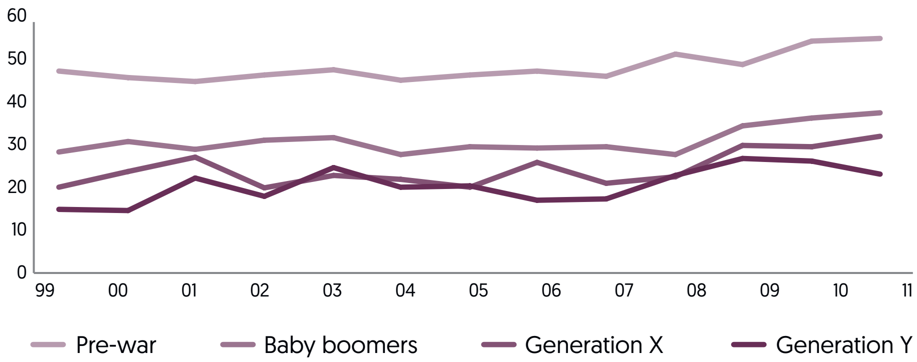


Figure 4: **Satisfaction with neighbourhood among social rented tenants (%)**

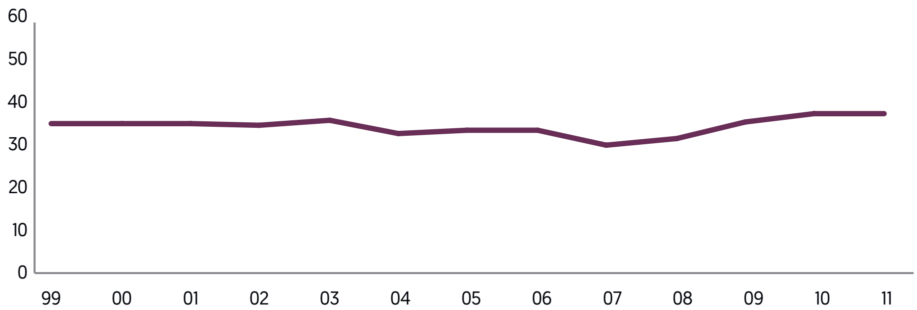


Figure 5: **Aggregate trend (%)**

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Generational analysis is key to preparing for the future

First published in **The Guardian** on **October 2013**

www.theguardian.com/public-leaders-network/2013/oct/28/generational-analysis-policy-miliband

There's been much discussion about whether the older generations in the UK have benefited at the cost of young people. Our new research has important lessons for policymakers when considering the young, the old - and those in the middle.

There are some bizarre objections to using generational analysis to help inform public policy. Probably the strangest is that it stokes up intergenerational resentment and conflict. "Phooey", as Ed Howker and Shiv Malik say in our new report out this week. Or, more conventionally, as David Willetts puts it in the same report, the whole point of understanding generational perspectives is to remind ourselves of the obligations between the generations: there is much greater risk of conflict from ignoring these.

The growing importance of a generational analysis is partly because the issues it raises are only likely to become more central: Ed Miliband thinks intergenerational fairness will be the issue of the next 10-15 years.

And it is already a significant concern for people. Far from being a cause of division, our research for the Joseph Rowntree Reform Trust shows near-universal, cross-generational sympathy for the tough ride our current generation of young people are experiencing. However, it also shows the public's significant and widespread fear about growing old and becoming a burden themselves on their family or the state: sympathy is not leading to much clamour for a shift in policy focus towards the young.

Policymakers therefore need to be clear whether the decisions they make will improve or make this worse. Of course, this is a huge challenge in practice where short-term and long-term perspectives can lead to diametrically-opposed conclusions about what to do now. But having an intergenerational focus at least encourages a discussion that's been badly lacking , partly as a result of our collective assumption that living standards will improve for each successive generation: the public are no longer convinced this will be the case. So intergenerational equity should be key to policy debates – but there is much more to be gained from understanding generational differences.

Sticking with the youngest generation, our analysis has highlighted how differently our current young view a number of key institutions like political parties and the welfare state. They have much less understanding of, and attachment to, these than previous generations of young people: it is not just the case that the young have always been less connected to these structures – that is partly true, but this particular cohort are different.

For example, we now have the largest gap among the European countries we've looked at between old and young on their attachment to political parties - only 31% of the youngest cohort identify with a particular party, it's 67% for the oldest cohort. Only 25% of the youngest cohort think the welfare state is one of our proudest achievements – the oldest cohort are nearly three times as likely to believe that.

“

The growing importance of a generational analysis is partly because the issues it raises are only likely to become more central

The practical point is that politicians and policymakers are in danger of having the wrong conversation with young people on these issues, without a better understanding of why we're seeing these patterns. It is not because our current young are selfish or just don't care. For example, our research with Demos for the Joseph Rowntree Foundation shows the young prioritise pension spending over many aspects of welfare they would more directly benefit from.

But generational analysis is not just about the youngest cohort – it highlights how much of an outlier our oldest generation are too. For example, it's very clear from our analysis that this pre-war cohort stand alone in their less liberal attitudes to homosexuality and gender roles. Many older people have moderated their views over time, but as a whole they remain markedly different. The practical point here is that we can be pretty certain that the national balance of opinion will continue to shift, and some of these perspectives will effectively die out with this cohort.

There are also equally important lessons and policy implications for those in the middle. We're starting on a new piece of research looking at views of retirement and how prepared different generations are for extended working lives - again a key policy question for the coming years.

And the choices that people make on this will be deeply generational, as they depend on your age at a particular time, in a particular context (for example, how much of your working life has been covered by a final salary pension). The earlier we help people prepare for the new reality of longer working lives and the changing nature of retirement the better - and we will do that much more effectively if we have a fuller understanding of each generation's experience and expectations.

"But generational analysis is not just about the youngest cohort – it highlights how much of an outlier our oldest generation are too

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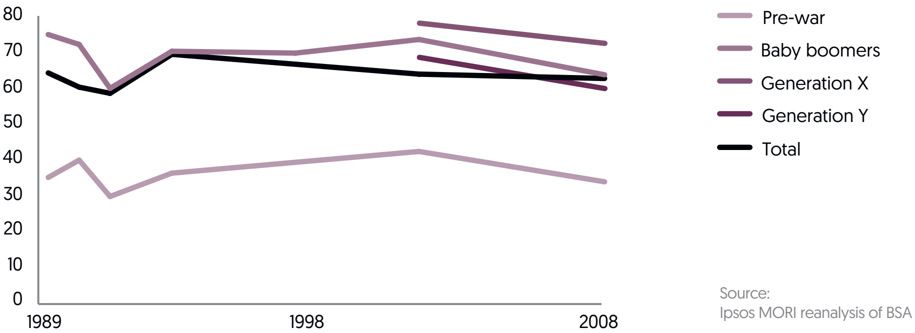
Gender roles and homosexuality

First published in **Ipsos MORI Generations website** on **January 2013**

www.ipsos-mori-generations.com/gender-roles-and-homosexuality#gallery[m]/2/



"A husband's job is to earn money; a wife's job is to look after the home and family" % "disagree"

There has been more analysis focused on generational differences in broader societal values than some of the other topics we have looked at, such as satisfaction with the NHS. This is understandable: there are often clear generational gaps on these types of values, resulting from the different societal norms each generation grew up with. [1]

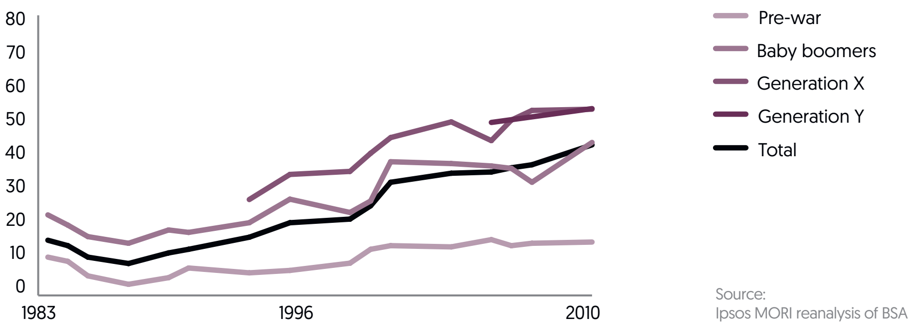
But these generational differences in values are still highly relevant for current policy debates. Here we look at two examples: whether it is a husband's role to earn money and a wife's job to look after the home and family, and attitudes towards same-sex relationships. Understanding generational attitudes to these provides important context for very current discussions on, for example, childcare support for working families, tax breaks for stay-at-home parents and gay marriage.

First, our attitudes towards different gender roles. The chart above shows very flat generational lines, indicating hardly any change of opinion within each generation over the 20 years covered.

But it also shows a very clear distinction between the attitudes of the pre-war generation and the rest of the population – with those born before 1945 half as likely as all other generations to disagree with the statement.

The flatness of the lines suggests that views of gender roles are pretty much set from early in life. This is backed up by a study which shows that support for working mothers is set early in teenage years and remains steady into young adulthood. [2]

There is, however, a different generational pattern regarding attitudes towards homosexual relations.



Are sexual relations between two adults of the same sex always wrong, almost always wrong, wrong only sometimes, or not wrong at all? % "not wrong at all"

First of all, as the chart above shows, there are clear period effects, where the opinions of different generations change in a similar way over time. This is particularly the case for baby boomers and Generation X, who show significant increases in agreement that sexual relations between people of the same sex are "not wrong at all". In contrast, the pre-war generation change very little in their views over the 28 years covered.

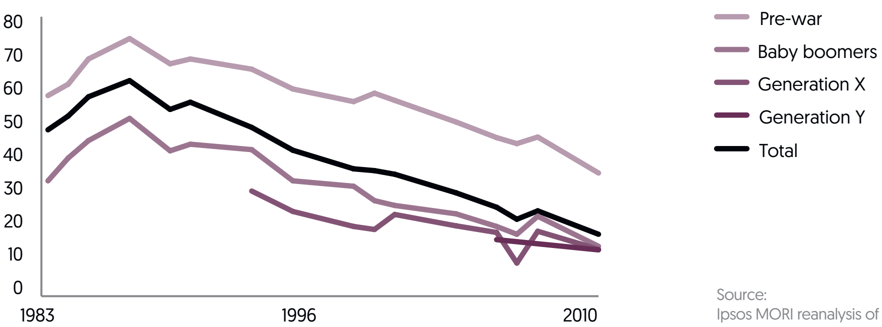
Secondly, there is a more clear-cut generational hierarchy than we see on the gender roles question, with baby boomers more in the middle between the pre-war and more recent generations. This highlights an important point: while baby boomers are generally very permissive, many (perhaps more than we would expect) do retain some reservations about homosexual relations. Having said that, the stability of views among the pre-war generation means that baby boomers are now relatively closer to younger generations, and the pre-war generation again stand out as different from the rest of the population.

But to get a full view of generational values it is important to look at other responses to this question. The chart below, which is based on the same question but shows those who think sexual relations between people of the same sex are "always wrong", shows a similar overall pattern – but highlights a number of important qualifying points.

Firstly, while the proportion of the pre-war generation who think that homosexual relationships are "not wrong at all" has remained fairly static, there has been a significant fall in the proportion who think they are "always wrong", from around three-quarters to under half. There are a number of possible interpretations of this, but it does suggest at least some softening of views. Secondly, on this measure, baby boomers are much closer to younger generations than those born before 1945. This pattern fits much better with what we would expect from baby boomers, but does not negate the point made above that there are still many boomers who are less permissive in their view of homosexual relationships.

Thirdly, this chart highlights that there is still a significant minority of all generations who believe that sexual relations between people of the same sex are always wrong. Clearly, this is most notable for the pre-war generation (37%), but it is still also the case for around one in six people from each of the younger generations.

And finally, looking at the two charts together, the impact of the AIDS epidemic in the 1980s is very clear. [3] Both the pre-war and baby boomer generations see steep increases in the proportion saying that sexual relations between adults of the same sex are always wrong, and it took almost a decade to return to 1983 levels. So, while both the general cultural context and generational replacement effects are moving us towards greater tolerance, it is clear that major events still significantly affect these more deeply held values.



Source:
Ipsos MORI reanalysis of BSA

Are sexual relations between two adults of the same sex always wrong, almost always wrong, wrong only sometimes, or not wrong at all? % "always wrong"

[1] Ross, A. and Sacker, A. (2010) British Social Attitudes 26, Chapter 6

[2] Phillips, M. (2004) British Social Attitudes 21, Chapter 3

[3] Ross, A. and Sacker, A. (2010) British Social Attitudes 26, Chapter 6

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Public attitudes change with the generations, and so must welfare policy

First published in **The Guardian** on **February 2013**

www.theguardian.com/society/2013/feb/19/public-attitudes-change-generations-policy

We are at a key point in the influence of different generations on our society. The pre-1945 generation is dying out, and being replaced by generation Y (born between 1980 and 2000), who have very different values – and the national balance of opinion is shifting as a result.

Take, for example, views of welfare and the question of whether benefits for poor people should be increased, even if it leads to higher taxes. This is a current debate: last month the government forced a vote on benefit cuts, testing Labour's resolve in opposing it. The government is confident it is reflecting public opinion – and it may be right. The number of people agreeing that we should increase benefits has halved, while the number disagreeing nearly doubled between 1987 and 2011; now significantly more disagree than agree.

It is vital for future policy to understand how this varies between different generations – our new analysis suggests three major patterns. Over the period, all generations show a downward trend in their support for more welfare spending. But the generations are different and stay different from each other, suggesting that the context in which you grew up is really important in forming your views of redistribution. There is a clear, consistent generational rank order: the pre-war generation are the most supportive of further redistribution through welfare, followed by baby boomers, then generation X (born between 1966 and 1979), then generation Y. The younger generation seems to have a different view of welfare, even allowing for the general shift in attitudes across society. Ipsos Mori is exploring this further in a joint project with thinktank Demos for the Joseph Rowntree Foundation. But it suggests a more individualised view of rights and responsibilities among younger people in the UK; they have received much less support in many areas of their lives, and they have responded by expecting less. As David Willetts pointed out in his book The Pinch, older groups are net beneficiaries from welfare spending; widespread support across cohorts can be maintained only if younger generations believe that a similar contract will remain in place when they are old. This seems likely to prove increasingly difficult, given that younger groups seem to have a much weaker perception of what they get out of it.

Generational analysis isn't new. In fact, recent years have seen a surge in studies focusing on increases in intergenerational inequity and conflict - mostly driven by concern about the burden placed on future generations by the good fortune of baby boomers. But there has been relatively little attempt to understand how values and opinions vary across the full range of generations. But this will have to change – politicians and policymakers increasingly need a full generational perspective to make sense of shifting public opinion.

> There is a clear, consistent generational rank order: the pre-war generation are the most supportive of further redistribution through welfare, followed by baby boomers, then generation X (born between 1966 and 1979), then generation Y

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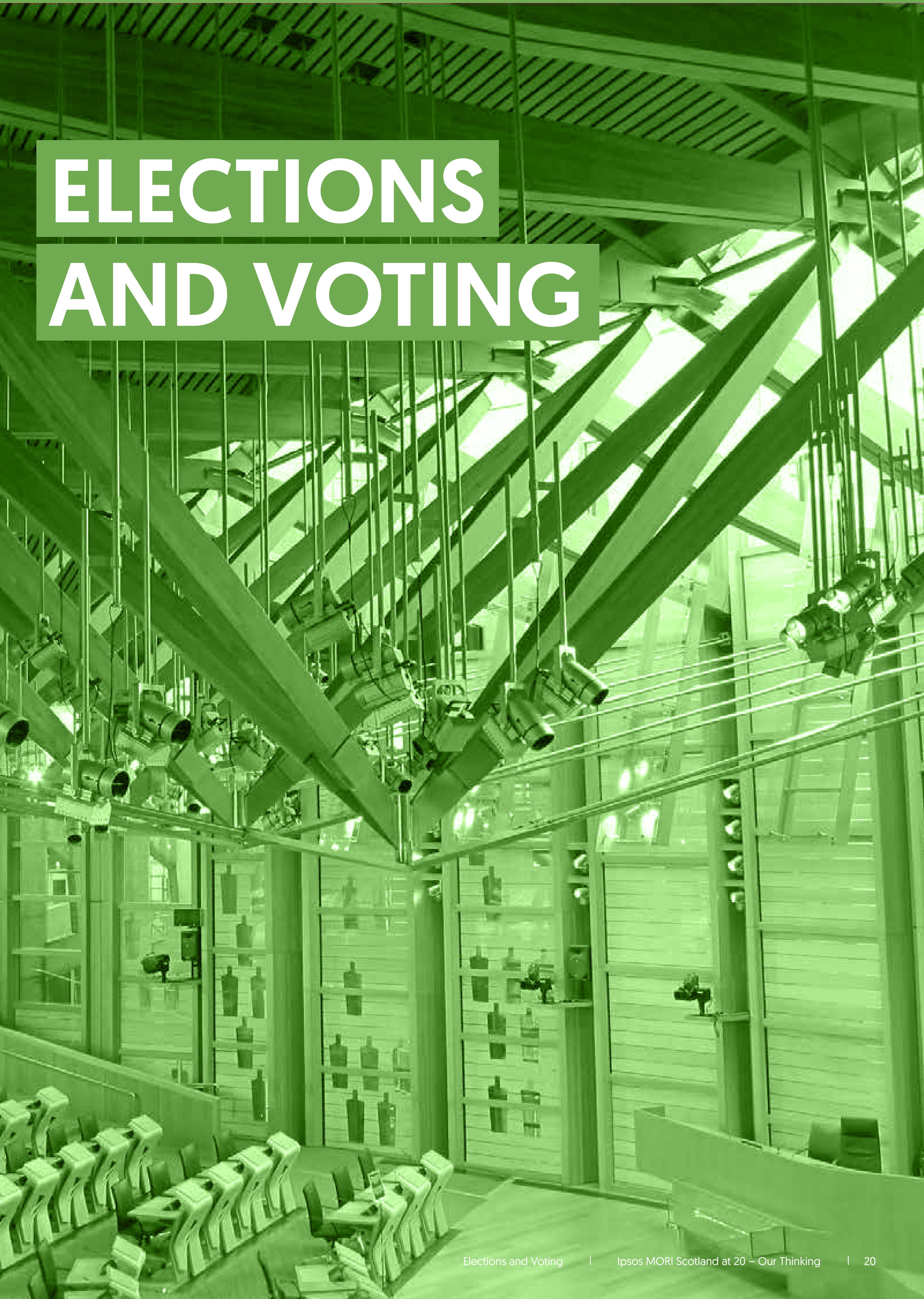
ELECTIONS AND VOTING



The 2016 Holyrood election will be different from the four that have preceded it

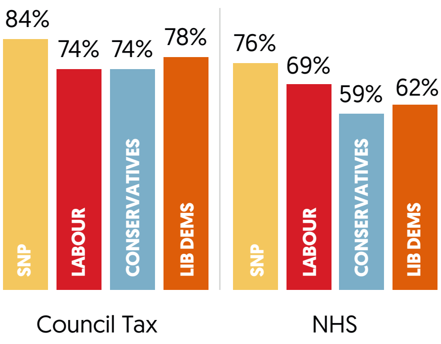
First published in **Scottish Policy Now, Issue 12** on **August 2015**

www.scottishpolicynow.co.uk/article/just-what-will-be-voting-on-next-year

The current Scottish Government, led by SNP First Minister Nicola Sturgeon, will head into the May 2016 election in good spirits; buoyed by the return of 56 MPs in May's general election. The SNP is significantly ahead in polling for next year, has a leader with unprecedented levels of popularity and a main opposition party struggling to find its voice.

That doesn't mean that next year's election won't be hotly contested and that there aren't significant areas of disagreement between the parties. I think the election will be fought under three broad headings.

The first concerns the 'bread and butter' issues which fall under the Parliament's remit, most importantly education and the health service. My analysis on why the SNP won so convincingly in 2011 argued that it was their ability to mirror the mood of the public on key areas, particularly the council tax freeze and the ring-fencing of NHS spending, which was crucial in delivering the overall majority which had hitherto been viewed as impossible.



Base: 1,019 Scottish adults 18+, 10-14 February 2011
Source: Ipsos MORI Scottish Public Opinion Monitor

On balance do you support or oppose the following policies?
Council Tax levels should continue to be frozen at current levels.
Spending on the NHS should be prioritised over spending on other public services

The opposition parties will hope that some of the recent criticism levelled towards the government, particularly around falling literacy levels, teacher numbers and education spending, will resonate with voters and make the election more competitive than it currently appears.

But the uncomfortable truth for those parties is that there is little sign of that happening. As a recent TNS poll found, voters have a far from universally positive view of recent government performance on key devolved issues (and are more negative than positive on crime and justice in particular). Yet the same poll had support for the SNP at a record 62%, leaving the obvious conclusion that it is not the government's record of delivery which is influencing voter choices ahead of the election.

This may change when we see the offers of all parties in their Holyrood manifestos. The First Minister has already hinted at significant offers on education policy and stressed that current disparities in attainment levels are 'unacceptable.' And on the equally important issue of healthcare all parties will hope to have a nuanced approach to the ambitious government strategy of integrating health and social care services. So, approaches to core public services may be more important to the outcome of the election than they appear at present though, I would argue, not as important as in 2011.

> "...it is likely that it is the constitutional question that will continue to dominate much of the election campaign

The two other levels on which this election will be fought explain why the traditional devolved issues may be of less importance this time. The first concerns the plethora of new powers which are currently making their way to Holyrood, via the 'Smith Commission' and the subsequent Scotland Bill progressing through the UK Parliament.

What is also often overlooked is that, as a result of powers devolved in the 2012 Scotland Bill, a new 'Scottish Rate of Income Tax' will come into force in April 2016. This will enable future Scottish Governments to amend the rates of income tax paid by Scots to a greater extent than they can at present.

This development, coupled with the range of other measures flowing from the Smith Commission, mark significant new territory and signal the onset of new powers particularly in terms of economic and fiscal policy. What is not yet clear is how each of the parties will react to this additional economic muscle and how they propose to change Scotland as a result.

We have seen the current Scottish Government enjoy levels of popularity which are very high after being in power more than eight years (in January, 66% said they were satisfied with the job the Scottish Government was doing). This is undoubtedly down in part to the policies pursued by the government and what has been widely seen as its impressive stewardship of the powers available to it. However, it may also be, in part, due to the fact no Scottish Government has yet been able (or forced) to make the types of decisions that tend to affect an administration's popularity, such as changing how much tax people pay, to the extent that it will be in the future. The arrival of these new powers may well make future Scottish Governments much more susceptible to a greater roller-coaster ride in terms of public opinion.

Despite the importance of delivering key public services and of managing the new economic powers, it is likely that it is the constitutional question that will continue to dominate much of the election campaign and at least the early part of the new parliamentary session, depending on the election result.
Such is the level of support in current opinion polling that many commentators and analysts think that the SNP's decision over whether to back a second referendum in its Holyrood election manifesto, and the conditions it attaches to backing a new vote, is likely to be a key moment both in the campaign and in the next session.

Although a second referendum is unlikely to involve a campaign as long as that leading up to the 2014 vote, it would undoubtedly still dominate the political discourse. Of course, even if the SNP backs a second referendum, it won't happen unless the party (or a group of parties who back indyref2) win a majority of seats next year.

That looks likely as things stand but does not make it a foregone conclusion for two reasons. First, there is little evidence that Scots see a second referendum as a key priority in the next few years.

Second, and more importantly, there is little evidence to suggest that attitudes towards independence have significantly shifted since 18th September 2014. Until they do, there is unlikely to be a second referendum.

I suspect that won't prevent the issue dominating column inches during and immediately after next year's vote.

> What is not yet clear is how each of the parties will react to this additional economic muscle and how they propose to change Scotland as a result

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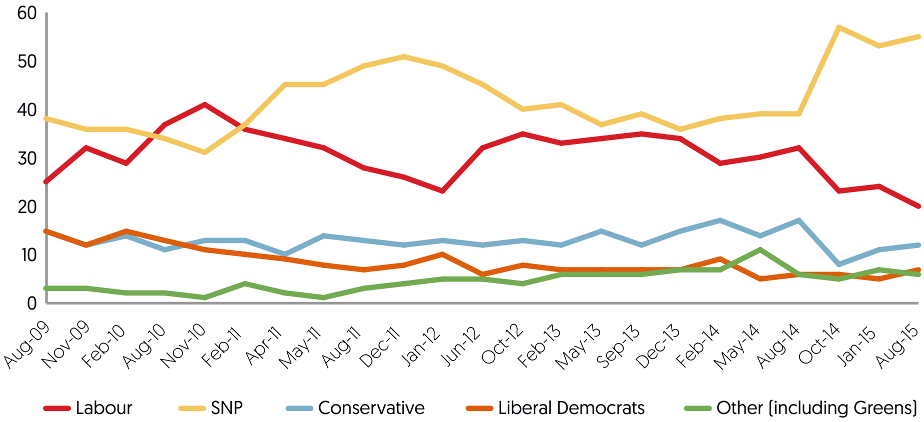
Nothing looks like halting the SNP bandwagon

First published in **Holyrood Magazine** on **October 2015**

www.holyrood.com/articles/inside-politics/polling-analysis-nothing-looks-halting-snp-bandwagon



Base: All certain to vote. Data collected among c1,000 Scottish adults.
Source: Ipsos MORI Scottish Public Opinion Monitor

If there were elections to the Scottish Parliament tomorrow, how would you use your first vote?

Finding someone who thinks that next year's Holyrood election will result in anything other than a convincing SNP victory is as tough as finding a Labour, Tory or Lib-Dem MP these days, and it's not hard to see why.

This year has been one in which the referendum's winners have become losers and vice versa. Although the polls were correct in showing SNP support at around 50 per cent ahead of the general election, it was not until the early hours of May 8th that Labour's dominance in Westminster crumbled seat by seat and the scale of the SNP's achievement became apparent.

And there is no reason to think that May 2016 will be anything other than a repeat performance.

True, the Additional Member System will likely prevent the scale of meltdown in opposition seats witnessed this year, but the current indications suggest a second overall majority for the nationalists is a distinct possibility.

Our own polling, most recently from August, highlights how SNP support has soared, in particular over the last 12 months. More widely, no poll conducted since May this year has shown the SNP constituency vote below 50 per cent. Moreover, the SNP leads Scottish Labour on the regional vote by at least 20 percentage points in every poll conducted over the same period.

And if the other parties think that recent negative headlines for the Government over key issues such as educational standards and the performance of Police Scotland might signal a change in public attitudes, they may be disappointed.

On almost all the key devolved issues, voters tend to think that the SNP has 'the best policies for Scotland' (the only exception is the environment, where the Greens come out on top). In the case of health, education and crime policy, the party's lead is as significant as its lead in voting intention, suggesting that those headlines do not, at the moment, appear to be damaging the party electorally.

This is particularly bleak for Scottish Labour, whose intended strategy of holding the SNP to account for its nine years in office looks unlikely at this stage to be a vote winner.

And the nationalists' policy dominance is reflected in views of the party leaders. The First Minister enjoys an approval rating of over 70 per cent, a figure matched by only Tony Blair in the early days of his administration, and significantly eclipsing her rival party leaders at a Scottish or UK level.

Further ahead, the SNP faces significant challenges. The devolution of more tax powers may lead the party, if still in government, to make difficult and potentially unpopular decisions on how revenue is raised, and there remains the thorny issue over the timing of any second independence referendum.

Of course, the mood can change and events can affect election outcomes. But as things stand, nothing looks like halting the SNP bandwagon next year.

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Public opinion and the EU

First published in **Fabian Society** on **March 2015**

www.fabians.org.uk/public-opinion-and-the-eu

With the prospect of an in/out referendum on Britain's membership of the European Union (EU) looming in the next few years, you might expect the issue to be exercising voters ahead of May's election.

On the face of it, however, we do not appear overly concerned about the EU; looking at data aggregated over the whole of 2014, just 2 per cent of voters rank the EU as the most important issue facing the country. Even those who support UKIP, the party whose founding objective was British withdrawal from the EU, have other more important concerns, with only 7 per cent ranking the EU as their most important issue. Even on our broader measure of voters concerns, covering all issues of importance, the EU ranks only in 13th place with just 9 per cent spontaneously mentioning it as a concern, rising to 20 per cent among UKIP voters but falling to just 5 per cent of Labour supporters.

However, while voters do not view the EU as a very important issue, it will be crucial in the forthcoming campaign, at least in part because of the policy consequences that flow from our membership, particularly the issue of immigration which voters see as significantly more important.

Around 4 in 10 voters (38 per cent) now see immigration as an important issue facing the country (50 per cent among Conservatives and 77 per cent among UKIP supporters), up from 30 per cent in 2010. More tellingly, the proportion of voters reporting that immigration will be a 'very important issue' in deciding how they will cast their vote in May has almost doubled from the same point in the last electoral cycle, from 14 per cent in March 2010 to 25 per cent today. So, salience with a policy issue closely affected by EU membership is currently much higher than with the EU itself. However, if an in/out referendum does take place during the next parliament, there will doubtless be a significant increase in the salience of the EU as an issue among voters.

Indeed, a look back at 40 years of our polling on important issues reveals that spikes in concern about the EU coincide with periods of significant debate about the extent and nature of our relationship with the EU. This includes the early 1990s when Britain was debating signing the Maastricht Treaty, the lead-up to the 1997 election when the Referendum Party stood on an anti-EU agenda and the late 1990s and early 2000s in the lead-up to and implementation of the Euro and the debate over the UK's membership of the new currency.

Experience from last year's Scottish independence referendum highlights the extent to which a debate about a key constitutional issue, determining where key decision-making powers lie, can stimulate significant levels of public interest and dominate the political discourse over a long period of time. And as with the independence referendum, public opinion is likely to swing as any detailed referendum debate gets underway.

Despite public attitudes moving towards an increasingly anti-EU position in the early years of the current parliament (with 54 per cent, of those who expressed a preference, saying they would vote to leave the EU in the event of an immediate referendum in October

> "However, if an in/out referendum does take place during the next parliament, there will doubtless be a significant increase in the salience of the EU as an issue among voters

2011), opinion has softened somewhat since. Indeed by our October 2014 poll, among those who expressed an opinion, 61 per cent preferred to stay in the EU while the remaining 39 per cent would vote for a 'Brexit'.

While such findings may provide heart to Europhiles, it is worth considering what public opinion looks like when offered a more nuanced choice of what Britain's relationship with the EU should be. Under such circumstances, only 17 per cent support leaving the EU while a further 34 per cent would prefer Britain to be part of an economic community with no political links. Meanwhile, 43 per cent of voters support either the relationship remaining unchanged (29 per cent) or a move to closer political and economic integration (14 per cent). Such analysis may hearten those who would campaign for a 'Brexit' in any referendum, that they can win the day if they manage to persuade a sceptical population that Britain is part of an inexorable move to ever closer integration among EU members.

Added to this research that points to the British public being most likely to associate the EU with negative attributes (when asked what the EU 'means to you personally' the two most common answers are 'waste of money' (33 per cent) and 'bureaucratic' (29 per cent), and it's not difficult to see how a future referendum would certainly not be a foregone conclusion.

So, don't expect the issue of British membership of the EU to dominate the forthcoming election. But that debate may be just around the corner.

> “...it is worth considering what public opinion looks like when offered a more nuanced choice of what Britain's relationship with the EU should be

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Labour's long-term decline in Scotland

First published in **Huffington Post** on **April 2015**

www.huffingtonpost.co.uk/mark-diffley/scottish-labour-polling_b_7062748.html

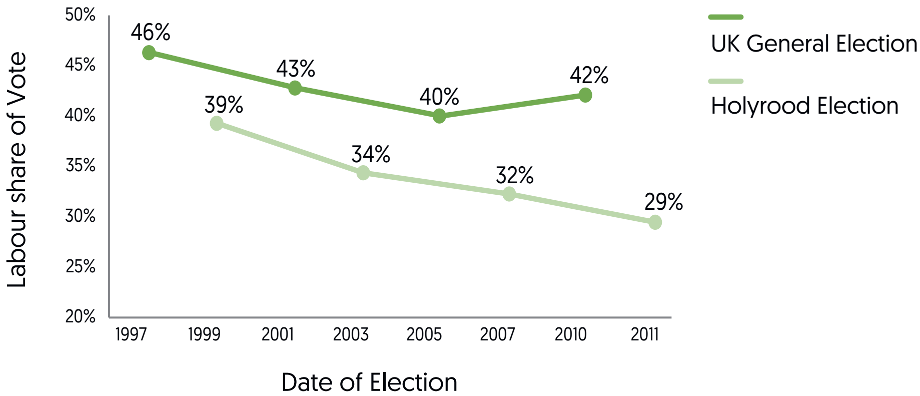
Despite being on the winning side, last year's referendum has done few favours for the Labour Party in Scotland. But the origins of the party's decline and the parallel rise of the SNP go back much further than September 2014. And the impact could have profound effects across the UK.

For much of last year, the constitutional choice faced by voters in Scotland dominated politics across the UK. But if you thought the No vote in September's referendum would signal the return to business as usual, it is now clear that you may well be wrong.

Much has been written since our poll last October, the first conducted in Scotland since the referendum, indicated that the SNP might make sweeping gains, including in Labour's traditional urban heartlands.

The poll was treated with some caution: we were in an immediate post-referendum climate of uncertainty; Scottish Labour had recently lost its leader who had been critical of the party on her departure; and general elections are traditionally seen as a contest between Labour and the Conservatives. All these factors surely meant that, as we got closer to May 7, we would see some support return from the SNP to Labour.

So far, no such movement is evident. As our polls and others have indicated, Labour has made few inroads yet on the SNP lead. This means that the SNP could have significantly more MPs than now and potentially more than Labour will have in Scotland after May 7. And in a tight contest in the race for No. 10, this matters not just for Scots but, possibly, for the make-up and direction of the UK government in the next five years.



Labour Vote Share in Scotland

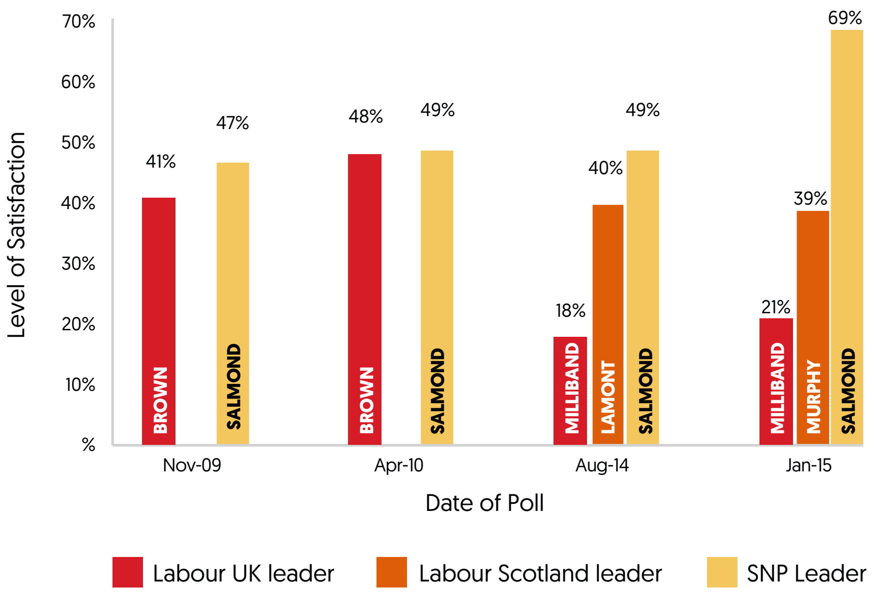
In the last few months, there has been much speculation about the referendum's impact on this shift of public opinion in Scotland. The SNP paint Scottish Labour as 'Red Tories' for campaigning on the same side as part of the 'Better Together' movement, arguing that they are the only party that can stand up for Scots' interests in a failing Westminster system.

However, while the referendum has undoubtedly crystallised and possibly accelerated Labour's decline north of the border, the origins of that decline go back much further than September 2014, and relate to issues wider than the constitutional question.

Firstly, the scale of the problem; since the first Holyrood election of 1999 the proportion of Scots voting Labour has declined, from 39% to 29% in 2011. The party has of course been out of power in Edinburgh since 2007. Further, the proportion of Scots voting Labour in general elections fell from 46% in Tony Blair's 1997 landslide to 40% in 2005.

Only in 2010, with Gordon Brown as Prime Minister, did the Scottish Labour vote briefly revive, up by two-points from 2005 to 42%. And it is the issue of leadership that provides the first clue to the change in party fortunes. Our analysis of the 2011 SNP landslide showed that the public was significantly more satisfied with then SNP leader Alex Salmond than any of his leadership opponents. And polling since 2011 enhances this trend, with first Salmond and now Nicola Sturgeon enjoying unprecedented levels of popularity, while the leaders of the other parties struggle for any significant traction among voters.

More specifically, for prospects in May, the current UK Labour leader has an approval rating among Scots below that even of Prime Minister David Cameron, and certainly well below the 48% satisfaction rating that Brown enjoyed immediately before the 2010 vote.



Source: Ipsos MORI Scottish Public Opinion Monitor 2011 – 2014 data

Labour/SNP Leader Satisfaction Comparison

The second clue lies in policies and government popularity. Over recent years the SNP has put forward a policy programme which both resonates with voters and has left Scottish Labour struggling to differentiate itself. Research on options for public spending we conducted in 2010 identified that 78% of Scots supported a freeze on Council Tax rates, while 68% supported prioritising spending on the NHS over other public services; both measures were backed by significant majorities of Labour voters and both were central planks in the SNP's 2011 manifesto.

Add to this the continued high levels of public satisfaction in the SNP-led Scottish Government, often running at more than double the rating achieved by the UK Government among voters across Britain, and it is not difficult to see why opinion in Scotland appears to have shifted so dramatically over recent years.

So, yes the referendum appears to have changed the mood and the dynamic ahead of the general election; of course, if one party manages to capture the vast majority of the 45% who backed independence last year then they have a significant advantage in an election where the remaining 55% will primarily be split among the three other main parties.

Of course not a single vote has yet been cast. Such are the size of the majorities in many Labour-held seats that even a minor revival may prevent the complete meltdown that many currently predict. But it is clear that, for the second year running, Scotland may be at the epi-centre of the country's biggest political event.

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> However, while the referendum has undoubtedly crystallised and possibly accelerated Labour's decline north of the border, the origins of that decline go back much further than September 2014

Is an independent Scotland becoming inevitable?

First published in **City A.M.** on **September 2015**

www.cityam.com/223583/scottish-independence-referendum-independent-scotland-becoming-inevitable

A fortnight today (18 September) will mark the first anniversary of the Scottish independence referendum – arguably the most important political event any of us in Scotland have experienced – giving pause for reflection on a year that has seen the referendum losers seem like winners, and vice versa.

Despite the relatively decisive margin last September (55 per cent voting 'No' to independence, with 45 per cent in favour), it is the SNP who have reaped the rewards; over 100,000 new members, 56 of the 59 MPs elected in Scotland at the general election and a likely historic consecutive overall majority at next May's Scottish Parliament elections.

Our own poll from earlier this week confirmed the SNP's dominance, not only in voting intentions for next year but also on all the key policy areas that will decide the election and on the personal ratings of Nicola Sturgeon, which far surpass those of her rival party leaders.

But where does that leave support for independence and the prospect of a second referendum? The watchword from the First Minister and the SNP since the referendum has been one of caution: if there is to be another referendum it must be held at a time when supporters of independence think they have the best chance of winning. Losing a second referendum would, likely remove the issue from the agenda for the foreseeable future.

That is why our poll finding that 53 per cent would vote in favour of independence if another referendum were held now is a mixed blessing for the SNP and independence supporters.

On the one hand, those who urge caution and want to wait before pushing for a second referendum will want to see the findings of this survey backed up by a series of polls with healthy leads before being at all confident of winning an actual vote. And views may obviously change significantly if and when a second referendum is announced and campaigning is underway.

On the other hand, the poll indicates that backing for independence may well be rising, which is not that surprising given the surge in SNP support since last year's vote. This, along with the presence of a Conservative UK government unpopular among Scots, may see the First Minister facing pressure to propose a second referendum sooner rather than later.

It is too early to say whether our poll represents a significant shift in mood in favour of independence and whether that support would be sustained if a second referendum were called.

But one thing is for sure; if you thought last year's referendum would resolve the issue for good, think again.

"If there is another referendum it must be held at a time when supporters of independence think they have the best chance of winning

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MANAGING REPUTATION

Scottish universities and reputation management

First published in **Scottish Policy Now, Issue 6**

www.scottishpolicynow.co.uk/article/scottish-universities-and-reputation-management

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 nightlife; 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 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.

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> ...for 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

What next for Rail? MPs' views on rail franchising

First published in **Ipsos MORI: The Politics Wire Blog** on **May 2014**

www.ipsos-mori.com/newsevents/blogs/thepoliticswire/1555/What-next-for-Rail-MPs-views-on-rail-franchising.aspx

Recent calls by Labour backbenchers to bring train services back under public control are just the latest salvo in an ongoing political battle over the future of Britain's rail network. Moreover, Ed Miliband's response this weekend – while stopping short of a commitment to renationalisation – suggests that we can expect more frequent skirmishes on this issue in the build up to the 2015 general election.

Britain's railways have long been a magnet for controversy. High speed rail, new rail infrastructure projects and long running concerns over capacity, connectivity and investment problems have never been far from the spotlight. Back in 2012, the collapse of the bidding process of the InterCity West Coast (ICWC) franchise made the front pages, with Virgin Trains and FirstGroup going head to head to convince the public that, despite issues with the way the process was handled by the Department for Transport (DfT), their business model offered the best deal for passengers and the public purse. Despite winning the contract initially, FirstGroup fell victim to irregularities in the selection process, and Virgin Trains was awarded a contract extension until 2017.

As the parties prepare their campaigns for what looks to be one of the most closely contested general elections for a generation, another facet of the industry and its structure has come under increasingly close scrutiny; that of passenger rail franchising and the argument over public versus private ownership of the nation's railways.

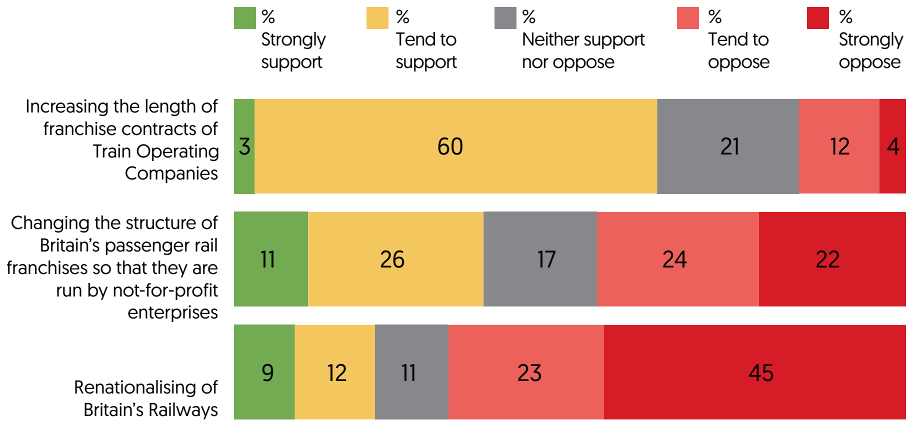
Labour's latest announcements follow the opening of bidding on the InterCity East Coast line franchise, which is being re-privatised after a brief period of public ownership. The route is currently operated by Directly Operated Railways; an arms-length holding company set up by the DfT following the default of National Express on its franchise contract in 2009. To many this "renationalisation" has been a success; passenger numbers are up and both revenue and profits have increased during public ownership. As such, some transport commentators, as well as transport unions including the RMT, Aslef and TSSA, are questioning the motives behind the decision to return the route to private-sector operation, and the exclusion of Directly Operated Railways from the bidding process. Indeed, some see this move as ideologically motivated, arranged by the current Government to reinforce its narrative about the virtues of privatisation.

Ed Miliband's comments appear to be an attempt to re-open debate on this topic and to carve out a distinguishing political stance ahead of the general election. Back in April 2014, building on the popularity of his promise to freeze energy prices for 20 months, the Labour leader hinted at the possibility of a shake-up of the current franchise model, should his party make a return to Government in 2015:

"We have got to look at these issues around the franchise. There are different models you can use. You can have a competitive model where there is a public option like there is in East Coast at the moment. So we are looking at different models for this."
Ed Miliband, Guardian interview, 4 April 2014

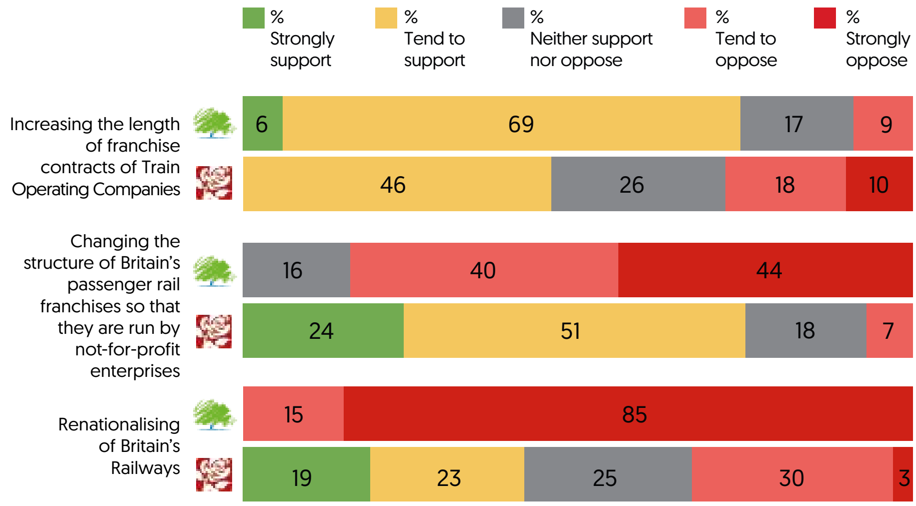
These developments have served to raise the profile of privatised rail in the UK, with questions being asked as to whether passengers and taxpayers are getting a raw deal. With annual fare increases a reliable source of passenger consternation, and commuters being singled out as a key demographic in marginal seats, the issue is only likely to gain momentum over the coming months.

At the end of last year, we asked a representative cross-section of MPs to what extent they would support or oppose three specific potential rail policies following next year's election. Judging by the balance of opinion, Ed Milliband has his work cut out if he is to achieve his goals and change the current model:



Source: Ipsos MORI MPs survey (Nov-Dec 2013) Base: All MPs asked (92); Conservative MPs (44), Labour MPs (39), Liberal Democrat MPs (7), Minority party MPs (2)

Thinking now about the long term future of rail following the 2015 election, I am going to read out some potential policies regarding Britain's Railways. Can you please tell me to what extent, if at all, you support or oppose each potential policy?



Source: Ipsos MORI MPs survey (Nov-Dec 2013) Base: All MPs asked (92); Conservative MPs (44), Labour MPs (39), Liberal Democrat MPs (7), Minority party MPs (2)

Thinking now about the long term future of rail following the 2015 election, I am going to read out some potential policies regarding Britain's Railways. Can you please tell me to what extent, if at all, you support or oppose each potential policy?

Firstly, the prospect of renationalising Britain's Railways attracts few supporters overall; just one in five (21%) MPs would support the move, while over two in three (68%) oppose the idea. Support comes mainly from the Labour benches, where a large minority of two in five (42%) support the notion of renationalisation. Many of these MPs believe that standards would improve on a public-owned railway. This opinion is driven in part due to perceptions of poor management and prioritisation of shareholder profit over standards in the current status quo and, for others, due to the example set by the performance on the East Coast line:

"Purely on experience. The East Coast line (which I travel on a lot) is much improved and indeed transport is like energy, one of these issues whereby profit should be completely reinvested to make it better"
Labour Shadow Minister

However, Ed Miliband would need to convince a large minority of one in three (33%) Labour MPs that renationalising the rail network is a good idea. For many of these MPs, their opposition to renationalisation is down to the cost of doing so, alongside reservations on whether services would improve as a result. As one Labour MP put it:

"It would cost money to renationalise them and actually there isn't going to be that money around. If you spent the money on nationalising you haven't got money for investment. There is no evidence that it would be any more efficient"
Labour Backbencher

Perhaps unsurprisingly, all Conservative MPs interviewed were opposed to the idea. For many of these MPs, opposition is rooted in ideology (i.e. that the private sector would deliver better results). For others, the cost of such a move renders the idea unworkable, while for some, the memory of the days of British Rail is enough to dissuade them from supporting a move to renationalise.

"I remember what British Rail was like. A history of closure and if you look at my constituency, when I was born there were 14 stations in my constituency, and I was born under British Rail and there isn't one left. Do you remember British Rail sandwiches? They were a joke"
Conservative Minister

"I oppose the nationalisation of anything, I remember what British Rail was like, it was a shambles. Private sector companies are far better at running anything, particularly the railways"
Conservative Backbencher

So, with this in mind, an idea that may have a better a chance of getting through Parliament, should Labour win the election in 2015, is changing the structure of Britain's passenger rail franchises so they are run by not-for-profit enterprises. Although more MPs oppose the idea (46%) than support it (37%), support is much more clear cut among Labour MPs; three in four (75%) would support such a policy. This suggests that this idea would gain more traction than wholesale renationalisation in the house should Labour win in May 2015. Again, as with nationalisation, not one of the Conservative MPs interviewed said they support this policy.

However, with support for both renationalisation and a not-for-profit model lying solely among the ranks of Labour MPs, it's unlikely that any change will see easy passage through the House. Indeed, a reinforcement of the status quo may well be more likely. There is an appetite among many MPs to increase the length of franchise contracts for Train Operating Companies (TOCs). Overall, three in five (62%) MPs support this notion, while just one in six (16%) oppose extending contract lengths. Furthermore, support transcends the party divide. Although the idea might well include both private and not-for-profit franchises (we did not specify this either way when interviewing MPs), three in four Conservatives (74%) and just under half of Labour MPs (46%) said they would support the policy. Just one in ten (9%) Conservatives say they would oppose the move, while three in ten (29%) Labour MPs hold the same view.

So, for the time being, it's probably safe to say that it is unlikely that the current private ownership model of Britain's passenger rail services is going anywhere. However, with Labour keen to gain political advantage from rail policy and the increasingly high profile coverage of rail franchising, the situation could change after the election.

Ipsos MORI's MPs' survey runs twice annually, interviewing a representative sample of c.100 MPs from the UK House of Commons. Interviews are conducted face-to-face.

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Hard to call: The next election and the private sector

First published in **Ipsos MORI: The Politics Wire Blog** on **January 2015**

www.ipsos-mori.com/newsevents/blogs/thepoliticswire/1625/Hard-to-call-The-next-election-and-the-private-sector.aspx

2015 looks set to be riddled with uncertainty for the UK's private sector. With none of the main parties enjoying a convincing lead as they kick off their election campaigns, British business will need to pay close attention to the polls to see which party (or parties) are likely to be in power come May - and anticipate the policy decisions that could affect their ability to grow in the near future.

Towards the end of 2014, Westminster politicians, Captains of Industry and the public alike were still largely buoyant about the UK's economic prospects, albeit entering 2015 with a slightly more cautious take on the state of play than a year ago.

This economic confidence, although now somewhat muted compared to the wave of optimism which followed the end of the recession, should in theory lead the private sector to expect growth in 2015 and beyond. However, despite this relatively positive outlook, the UK private sector faces myriad challenges and potential barriers to expansion. From geopolitical instability and falling oil prices to an upcoming general election with no clear outcome, growth in 2015 is far from certain. With election campaigning underway, businesses will be keen to see which policies are most likely to foster or stifle the climate for sustained growth. Back in the summer, Ipsos MORI spoke with a representative cross-section of MPs to understand their perspective on the issues facing British businesses. While opinion often follows the traditional party divide, there are some useful indicators of where policy priorities may lie for the main parties.

For instance, looking at the industry sectors which MPs see as most important to economic growth sheds some light on potential policy targets in the run-up to May 7.

Overall, over half of MPs (55%) regarded manufacturing as key to growth in the next five years, with Labour MPs notably more bullish than their Conservative counterparts (61% of Labour MPs saw manufacturing as important, compared with 42% of Tory MPs).

The IT sector has evidently caught the eye of the Tory party, with over half (52%) of its MPs citing the industry as important to the UK's economic growth in the next five years. Many Conservative politicians also expect the financial sector to contribute to future growth, with a third of (34%) Tory MPs citing banking as important to the economy and a third (33%) regarding financial services as integral to the economy. Interestingly, electricity and power generation is also seen by many Conservatives (31%) as a key motor of economic growth. This suggests that energy policy might be a fairly prominent battleground in the run up to the election – perhaps unsurprising given Ed Miliband's proposal to freeze energy prices last year, and the ongoing debate around privatisation and national infrastructure/utilities.

Priorities on the Labour benches are somewhat different. Manufacturing is clearly front and centre in their thinking, with three in five (61%) Labour MPs seeing this as the most important sector to economic prosperity. Interestingly, Labour MPs have high hopes for the pharmaceutical and biotech sector; two in five (41%) saw this sector as important to the economy over the next five years. With many UK businesses in the sector being involved in the wave of large scale mergers and acquisitions in 2014, Labour MPs may be expecting the recent growth in the UK pharma sector to continue. Labour MPs also have an optimistic view of the construction industry, with two in five (40%) seeing this as important to the UK, suggesting that Labour policy announcements in the coming months could be sympathetic towards construction projects around infrastructure and housing.

An expectation that a sector will boost the UK economy is one thing, but will a sympathetic audience in the House equate to support? Looking forward to the next parliament, the sectors that could expect support from the Government aren't necessarily those that are seen as the most important to the economy. Given the importance of effective transport links as a catalyst for growth, it is perhaps unsurprising that transport is seen by over half (56%) as the industry sector most in need of assistance in the next five years – with no difference in opinion on this measure between the Labour and Conservative benches. That said, when asked what issues their party would focus on to promote private sector growth, Labour MPs are much more likely than Tory MPs to say they will focus on transport infrastructure (36% versus 7% respectively). This suggests some very different outcomes on the horizon for the sector, depending on the form the Government takes in May.

There are signs that Conservative business and economic policy may primarily favour sectors they see as at the forefront of growth in the coming years. Nearly two in five (38%) see IT as in need of Government support, alongside electricity and power, which is cited by one in three (35%) Tory MPs. Interestingly, while not seen as vital to growth, two sectors are relatively prominent among the Tories as needing Government assistance. While just six percent of Conservative MPs saw aerospace and defence as one of the most important sectors for growth, one in five (22%) felt that the sector needs support. Furthermore one in five (22%) Tory MPs also expected to provide support for the farming and agriculture sector despite just one per cent saying that it is an industry vital to growth. Clearly, Conservative MPs believe this is an industry in need of help in the next few years and are also keen to keep their constituents, many of them from rural areas, content.

Driven largely by Labour MPs, there is also an appetite for providing support to the manufacturing sector. Overall, two in five (40%) feel this sector needs support, rising to over half (54%) among Labour MPs, but just one in four (25%) on the Tory benches. High street retail, while not cited by Labour MPs as one of the most important sectors to the economy, is seen as in need of some Governmental care and attention by three in ten (31%) Labour parliamentarians. Nearly one in four (23%) Labour MPs also felt that the construction sector could do with Government support in the short term – which would certainly be a good move to woo a core segment of their traditional support base.

Overall, however, a skills shortage in the workforce was seen as the most pressing issue for British business. Two in five MPs (40%) said this was the most important problem facing businesses. Interestingly, there was little difference in opinion along party lines. Nearly two in five Tories (37%) and just over two in five Labour MPs (43%) felt this was the case. Just over two in five (44%) MPs overall suggested that a focus on apprenticeships, training and skills development would be a key part of their policy to promote private sector growth. Notably, over one in three (36%) Conservative MPs favoured steps to improve education and schools to boost private sector expansion, compared with just one in eleven (9%) Labour MPs.

Conservative MPs unsurprisingly saw over-regulation as the main issue affecting private sector business – two in five (41%) cited this as a leading problem. A similar proportion (45%) said that the Conservative party would focus on deregulation and the removal of red tape to help boost growth. However, reduced taxation was by far the most popular method of promoting growth in the Tory camp, mentioned by over half (52%).

In contrast, just under one in four (23%) Labour MPs regarded getting banks to lend as one of the most important problems for business and two in five (38%) cited access to investment/ loans as their preferred means of giving the private sector a boost, alongside improvements to transport infrastructure (36%).

In conclusion, opinion is often aligned on both sides of the house in terms of the issues facing British business, as well as the sectors that are most important to UK economic growth and those that need support. However, there are also some key ideological differences. These relate particularly to regulation, taxation, government support for business and the availability of skilled workers. These differences (which may well be amplified with certain combinations of coalition governments) have the potential to exert a profound impact on policy and therefore the political, social and economic climate in which businesses operate after the election. All of this means that businesses will need to pay close attention to the election campaign and be ready to harmonise their strategy with government policy.

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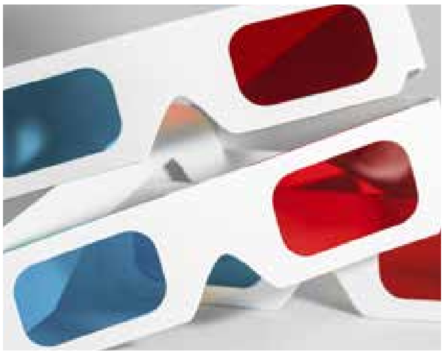
RESEARCH INNOVATION

The attention deficit: More screens, more content and how brands can connect



First published on **Ipsos MORI website** on **September 2015**

www.ipsos-mori.com/researchpublications/publications/1759/The-Attention-Deficit-More-screens-more-content-and-how-brands-can-connect.aspx

Your customers are amazing. Inside their heads is the most complex and powerful structure in the known universe, the human brain.

It's a bundle of biological wiring so vast that if each connection was laid end to end it would circumnavigate the earth twice over.

If it was a computer it could store around 2.5 Petabytes (a million gigabytes) of data.

Governing access to the brain's data centre is an equally impressive filtering system, often referred to in academic psychology as Working Memory. A filter constantly sorting relevant and useful experiences across everything seen, heard and experienced, storing this in the hard drive for another day or throwing it out in the recycle bin.

This filtering system your customers use to great effect is now being faced with a new environment, a transition in our digitally connected world from information scarcity to abundance. Google Chairman Eric Schmidt encapsulated this new age of abundance in 2010 when he said the same amount of information created between the dawn of civilisation through to 2003 was now being created every two days.

This transition to exponentially more information availability, alongside the constant filtering of the relevant from the irrelevant is creating a new dynamic marketers and media owners need to face: Attention Deficit. A reaction from our brains to filter more noise and store the same amount of information, resulting in people paying less and less attention to what they see, hear and experience.

This new dynamic is no better observed than in the screens we interact with on a daily basis. The shift from a 20th century appointment to view TV or focused internet access on fixed in-home devices to always on, anytime, anywhere access provides more content and information than can be humanly consumed.

To put this into context, trended data from the Ipsos Connect Tech Tracker amongst a nationally representative sample suggests the average number of connected devices in UK online households has increased from 2.9 in 2013 to 4.0 in 2015, creating more opportunities and contexts to consume content.

An Ipsos Connect research study sponsored by Google (2012) suggests this access to multiple connected devices leads to 'always on' use, with those using three screens constantly switching and multi-screening across devices over the course of an average day.

The results can be found here: www.ipsos-mori.com/threescreenblog

In this context, it's clear advertisers and media owners need to adapt to the saturated anytime, anywhere overload of content and look for ways to benefit from these different viewing contexts and moods to create impactful, measureable brand and sales outcomes.

To realise this opportunity, advertisers and agencies need to pivot from a 'one size fits all' strategy, using one video or visual execution across screens, to a screen sensitive one, adapting creative to different devices and viewing contexts, while anchoring each one to the same core idea and brand proposition.

The cornerstone of this screen sensitive strategy is data driven. Content and advertising consumption on digital screens generates an array of profile and intent signals that, when used in a focused way alongside other profiling and measurement data sets can support measureable outcomes.

Based on our work with global advertisers and media owners, we see four key tactical pillars to deliver the screen sensitive strategy and have highlighted examples where advertisers are seizing the opportunity they create:

2013	2014	2015
2.9	**3.4**	**4.0**

Average number of connected devices in UK households (Tech Tracker Q3 2015)

1. Optimise by device:

Companies like Coke are leveraging profile signals of different mobile devices to tailor their content to users. Knowing that feature phone users in India don't have the bandwidth for rich digital content, they use device signals to identify these users asking them to ring and disconnect the call. They are then sent a message to download free ringtones and content for the advertised brand.

2. Connect across TV And digital screens:

After launching their TV campaigns, some advertisers are now using tools such as Ad Words to understand how to measure links between the TV investment and over-indexing of search keywords, to refine buying strategies for sponsored searches. This has the potential to connect people to extended content or advance them further in the purchasing funnel.

3. Optimise to different advertising experiences:

Many digital platforms now offer user opt-in video ad formats, where the user chooses to watch the ad or move directly to the content and the advertiser only pays for a minimum time or complete view. This alternative viewing environment has led advertisers such as Mountain Dew to experiment, testing different versions of their campaigns to understand how to increase view through rates and brand impact for skippable ads.

4. Leverage profile and location signals on digital screens:

Digital media owners like Facebook and Google allow campaign targeting by geographic area, time of day and other digital behaviour signals. This allows advertisers to deliver more specific, relevant messages. An example being advertisers who buy sponsored search placements with stores stocking their products, near the location of a user who searches a target key word.

More advertisers are recognising the scarcity of time faced by their target customers and embracing this new dynamic with innovative approaches and use of multiple data sets and technologies. At Ipsos Connect we actively support the success measurement of this kind of experimentation. **MediaCell** uses passive technology for measuring audible aspects of TV, online and radio ads via a watermarking technique. Real time ad exposures are measured by an Ipsos mobile app, which enables us to evaluate brand campaigns for media and brand impact purposes such as the size of audience for media, channels, programmes or commercials. Campaign effectiveness, ROI and platform context exposure can all be effectively determined.

Another great example is **Live|Test** which provides an early read on the effectiveness of display ads and video. Ad serving technology allows us to deliver client ads directly to our panellists; we then create test and control groups and survey them later to measure brand impact. This means it's highly realistic, whereby ads are experienced live on the web and not in a research environment.

We believe we're only at the start of the journey to give advertisers and media agencies the confidence to embrace a screen sensitive strategy that benefits from the current landscape. While the Attention Deficit means your customers' amazing brains are by necessity filtering out more information, you can tailor your content to a multiscreen, always on, anywhere, anytime environment, creating new opportunities to connect and tell your brand story.

By doing so, you will maximise the chances of your story being retained in the desire and consideration folders of their hard drive. If you don't, you run the risk of being filtered into the recycle bin.

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Online forums

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We all know that the internet has opened up new avenues for collecting data, from online surveys and focus groups to social listening and 'big data'. One of the lesser known approaches is the use of online forums to conduct qualitative research. This may be because online forums have been little used in social research compared to market research.

So, what is an online forum and what do you need to consider before utilising one?

[An online forum is] a website that provides an online exchange of information between people about a particular topic. It provides a venue for questions and answers and may be monitored to keep the content appropriate. Forums can be entirely anonymous or require registration with username and password. Messages may be displayed in chronological order of posting or in question-answer order where all related answers are displayed under the question.

Source: **PC Magazine**

An online forum takes the form of a structured conversation organised around topic 'threads' and enables participants to post responses to questions and comments made by the facilitator or other participants. The facilitator, in turn, can ask supplementary questions, probe for more responses and encourage participants to comment on each other's views. Unlike in online focus groups, the moderator and participants do not need to be available to participate in a forum at a set time; rather contributions can be made at any time of the day (or night).

Like most online research, two of the main advantages of online forums lie in the fact that they are relatively cheap to conduct and offer a means of engaging with participants who are geographically dispersed or have busy schedules – participants can contribute from home at a time that is convenient for them. Further, in comparison to more traditional qualitative methods, research using online forums tends to be conducted over a longer period of time, often a week or a month, which provides 'space' for participants to consider their views, or even perform a pre-defined research task, before responding. Online forums also provide the opportunity for participants to upload photos or videos to illustrate or provide evidence for their opinions.

The advantages outlined above, combined with the potential that online forums offer for participants to remain anonymous, mean that the approach can be a useful option for conducting research among hard to reach groups and/or on sensitive subjects – for example, research among young people on the subject of eating disorders. In this case, you could run an online forum over a couple of months to provide sufficient time to recruit participants – potentially from existing online communities or support networks – and give them the opportunity to use a pseudonym, which might make them more comfortable about discussing the topic.

However, online forums do have their limitations, particularly when it comes to general public research. Some of these limitations are common to most forms of online research, such as:

- difficulty achieving a representative sample due to varying levels of internet access among the general public – while around three-quarters of Scottish households have internet access, this varies considerably by age and social grade

- the requirement for higher levels of online literacy and/or familiarity with the format to enable participants to get the most out of the discussion – while online forums suit audiences who are familiar with forums and other social media, those who are unfamiliar or lack confidence in using a computer or the internet will be less likely to participate.

Other potential limitations, all of which we encountered on a recent study aimed at gauging public views on the key issues for Scotland's environment, relate to:

- securing participation – despite recruiting a large number of participants through a variety of methods, we found only a small number of people (89) registered for the forum and an even smaller number (13) contributed to the discussion

- maintaining engagement – despite active monitoring and moderation of the forum, it was difficult to encourage participants to contribute more than a couple of short comments and it tended to be the thee or four most highly engaged participants who commented more than once

- moderating in real time – time lapses in exchanges between participants, and between the moderator and participants, made it difficult to generate momentum in the discussions.

Therefore, prior to selecting online forums as a method, it is important to consider your target audience and the purpose of the research. Online forums tend to be most suited to discussions among smaller, more targeted audiences (including stakeholders, interest groups and professional groups), rather than the general public, and discussion focusing on very specific topics. Examples might include a discussion among health professionals about changes to working procedures or a consultation with local interest groups about a proposed new development. Forums can, of course, also be conducted among pre-existing online communities, such as football supporters, to explore issues of specific interest to them.

As well as your target audience, it is important to consider whether the topic is appropriate for a forum setting. Comments made online, particularly via public platforms, are permanent and can be shared quickly and easily through social media networks. Consequently, you should consider the potential risk to your organisation's reputation if, for example, negative or abusive comments are made on the forum, particularly if such comments are picked up by the news media. To mitigate this risk, you may want to restrict the extent to which people can view or participate in the forum.

The use of online forums for social research is still relatively new but, as more and more people become au fait with social media, some of the barrier outlined above will be lowered. While we expect online forums to remain a niche method, they do offer an alternative approach to conducting research among targeted audiences.

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Identifying priorities with paired choice analysis

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www.ipsos-mori.com/contactus/offices/scotland/approachnewsletter/Approach-Spring-2011.aspx

Identifying people's priorities can help organisations better tailor their services. We have previously discussed qualitative methods for gauging public priorities in local authority budget setting (*Approach*, autumn 2010). However, there are a range of quantitative methods available and one of the most effective of these is 'paired choice'.

Say we want to measure public preferences for the following ten options available to the Scottish Government to reduce the budget deficit.

1. Raise Council Tax
2. Cut spending on the NHS
3. Freeze public sector pay
4. Cut public sector jobs
5. Cut public sector pensions
6. Increase the free bus travel qualifying age from 60 to 65
7. Charge older people on higher incomes for their personal care
8. Increase prescription charges
9. Introduce tuition fees
10. Charge drivers for using major roads

We could ask them to rate each option on a scale of one to ten in terms of how strongly they feel that it should or shouldn't be adopted, from which we can calculate mean scores. However, meaningful interpretation is limited because it is possible for respondents to indicate that every option should or shouldn't be adopted and most options tend to become clustered around the same score.

Alternatively, we can ask respondents to rank the options from most to least preferred. However, while ranking is effective with a small number of options, it becomes less reliable when respondents are asked to rank longer lists. Respondents tend to find it relatively easy to identify the one or two options they prefer and one or two they like least, but find it difficult to discriminate between middle ranking items. As a result, neither rating nor ranking exercises give us a clear indication of the public's relative preferences.

Paired choice is designed to draw out the extent to which respondents prefer each option in relation to every other option. It works by pairing options off so that they are essentially 'competing' against one another. A series of these pairs are presented to respondents, who are asked to choose which of the two options they prefer. Respondents are forced to choose an option and cannot give a 'don't know' answer.

The number of pairs presented to respondents will depend on the number of options being tested and the methodology used to administer the questionnaire. In this example, 10 options would create 45 pairs[1], which is too many to present to every respondent. The most we would recommend is 15 pairs if conducting the survey via telephone and only slightly more if conducting it face-to-face or online (self-completion paper questionnaires are less suitable for paired choice). However, providing the sample size is large enough, respondents do not have to be shown all possible pairs to obtain reliable results. In this example, the 45 pairs are divided into five groups of nine pairs (see Table 1 below), with each respondent given one group. Thus a sample of 1,000 will ensure each pair is put to 200 respondents, while nine is a comfortable number of pairs for respondents to complete.

Relative preference scores are used to estimate the extent to which each respondent prefers each option over each of the other options. The position of each option in the ranking and its overall score is calculated by taking an average of the score for each option across all respondents (see Figure 1 on the next page). In addition, with a large sample we can examine how preferences differ between specific groups.

Reporting the results of this analysis can be tricky. Relative preference scores reflect the share of total preference each option has, which means we have to imagine that there is a pool of total preference to be allocated across each of the options. For example, figure 1 shows that raising the free bus travel

	Group 1	Group 2	Group 3	Group 4	Group 5
Pair 1	3 v 6	1 v 5	7 v 2	2 v 4	9 v 6
Pair 2	1 v 4	5 v 7	9 v 10	10 v 3	8 v 4
Pair 3	7 v 9	6 v 10	8 v 7	1 v 7	10 v 2
Pair 4	4 v 7	2 v 8	3 v 5	9 v 1	2 v 9
Pair 5	2 v 1	8 v 3	5 v 9	4 v 6	7 v 3
Pair 6	5 v 2	7 v 6	4 v 3	5 v 8	1 v 10
Pair 7	10 v 5	4 v 9	6 v 1	7 v 10	6 v 8
Pair 8	9 v 3	3 v 2	1 v 8	6 v 5	4 v 5
Pair 9	8 v 10	10 v 4	2 v 6	8 v 9	3 v 1

Table 1

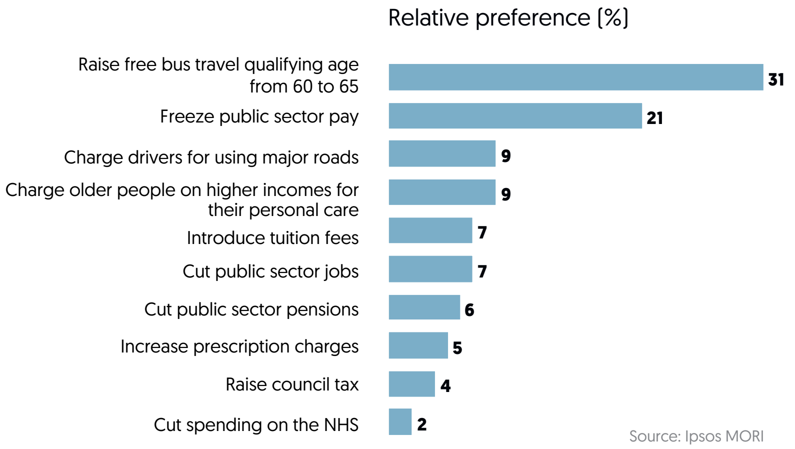

Figure 1: **Relative preference scores for the different options available to the Scottish Government to reduce the budget deficit**

qualifying age has a relative preference score of 31%, which means that 31% of the total preference would be allocated to this option. Essentially, relative preference reflects a collective strength of feeling towards a particular option in relation to the others – the higher the percentage, the more strongly it is preferred among respondents.

Analysing the data in this way allows us to reflect the public's preferences in-line with the decisions facing the Scottish Government. After all, the Scottish Government can introduce several of the options at once – they do not have the restriction of having to choose just one of the options. Therefore, the relative preference scores provide a general measure of the Scottish public's preference across all of the options. In other words, it reflects how likely they are to accept each option. This allows us to say that raising the free bus travel qualifying age is over three times more preferred than charging drivers for using major roads or charging older people on higher incomes for their personal care.

Paired choice does have limitations. It relies on respondents making instant decisions based on relatively abstract concepts which they may know little or nothing about. For example, respondents are not given information on the net saving each option is likely to generate, what proportion of the required savings this would be or the impact of the option on them. Knowing any of these may alter their preferences. Paired choice also requires a lot of specialist input, both prior to fieldwork, in scripting the complex routing required for the questionnaire, and after fieldwork, in conducting the analysis, which can make it more expensive than rating or ranking methods.

Overall, paired choice is an effective method that can be used to gauge respondents' priorities on anything from government policy and public spending to service provision and journey planning.

[1] Calculated by multiplying the number of options (10) by the number of options it will be paired against (9) and then dividing by 2 (to account for the fact that each pair is used only once)

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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.

A range of public, private and third sector organisations have used the Monitor to capture information about a variety of topics, including:

- attitudes towards particular issues relevant to their organisation or policy area
- awareness and perceptions of their brand or organisation tracked over time
- perceptions among current and potential users of their services.

www.ipsos-mori.com/SPOM

MSPs Survey

The MSPs survey helps public and private sector organisations understand their profile and reputation in the Scottish Parliament. The survey provides feedback from MSPs on what makes for good relations, the criteria they use in making judgements about organisations, the issues being raised by constituents and the sources of information they commonly access. The survey is conducted every autumn and each year we speak to a minimum of 70 (of the 128) MSPs, using one-to-one face-to-face interviewing. MSPs are unaware of client identities and their opinions are unattributable, so their replies are honest and impartial.

www.ipsos-mori.com/contactus/offices/scotland/mspssurvey.aspx

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