



# UNDERSTANDING SCOTLAND —————

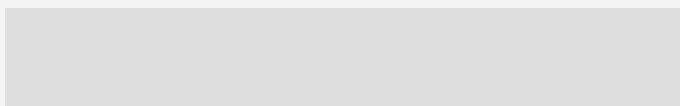
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A NEW SURVEY FOR SCOTLAND

SOCIETY  
May 2022







# CONTENTS

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INFORMATION	1
INTRODUCTION	2
KEY POINTS	3
PUBLIC PRIORITIES	4
SCOTLAND'S DIRECTION OF TRAVEL	7
TECHNICAL DETAILS	9
FIND OUT MORE	9







# UNDERSTANDING SCOTLAND

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

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



# INTRODUCTION

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## SOCIETY - MAY 2022

We are delighted to present this Understanding Scotland report on the state of play in Scotland.

This report explores the public's priorities as we emerge from the pandemic and inflation begins to bite. The ongoing cost of living crisis tops people's concerns, supplanting healthcare as the number one issue for the Scottish population, and economic and constitutional debates appear to be waning. While the pandemic has fallen sharply in salience, we find widespread and considerable concern over rising prices across all age groups and regardless of social class and employment status.

This report flags evident and widespread concern at the cost of living crisis, and a further report to follow will explore the gravity and extent of it, including how people are feeling about it and how they have responded.

For the first time since our polling began last year, we find that a majority of those expressing an opinion believe that things in Scotland are going in the wrong direction. Aside from the cost of living, those saying that things were on the wrong track were more motivated by the economy, trust in politics and education, while the more optimistic about Scotland's direction of travel were more concerned with constitutional and environmental debates.

# UNDERSTANDING SCOTLAND

## SOCIETY AT A GLANCE

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



### 01

#### THE COST OF LIVING CRISIS TOPS PEOPLE'S CONCERNS

As inflation has begun to bite, the cost of living has supplanted health concerns as the top issue facing Scots. This evident concern cuts across all age groups and social classes, though is especially pronounced in more deprived areas and financially vulnerable groups.

### 02

#### THE PUBLIC HAS MOVED ON FROM COVID

While healthcare and the NHS ranks second in Scots' concerns, the pandemic has fallen sharply in salience, with only 4% deeming it a top issue, down 12 points since January.

### 03

#### A MAJORITY THINK THINGS IN SCOTLAND ARE GETTING WORSE

For the first time, our polling finds that a majority of those expressing an opinion have judged that things in Scotland are going in the wrong direction. These people were more likely to be motivated/concerned by the economy, education, and trust in politics.

### 04

#### VULNERABLE GROUPS ARE WORRIED ABOUT DAILY NEEDS

In addition to the cost of living, people in the most deprived neighbourhoods, as well as the unemployed and inactive, were concerned about issues of poverty, housing, and jobs, and markedly less concerned about the economy.

### 05

#### AGE CONTINUES TO DETERMINE MUCH OF PEOPLE'S OUTLOOK

Young people were markedly more likely to say that things in Scotland were on the right track, and were more than twice as likely as any other age group to prioritise tackling climate change.



## PUBLIC PRIORITIES

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The cost of living tops people's concerns, with almost half (47%) of all respondents ranking this among their top priorities. This figure has more than doubled over the past 8 months as inflation has begun to bite and other issues have waned in salience. This issue dominates regardless of age, social class and employment status, and is a particular priority for households with children. Older respondents and retirees, however, appear less concerned by the issue, with less than a third of retirees and those aged over 65 citing it as a top issue.

Healthcare follows in second place, with 2 in 5 people deeming this a top concern, rising to half of those aged 65 and over. In parallel, the salience of the Covid-19 pandemic appears to have fallen sharply, however, with only 4% of people ranking this among their top concerns. In the most affluent areas and among older age groups, healthcare leads over the cost of living.

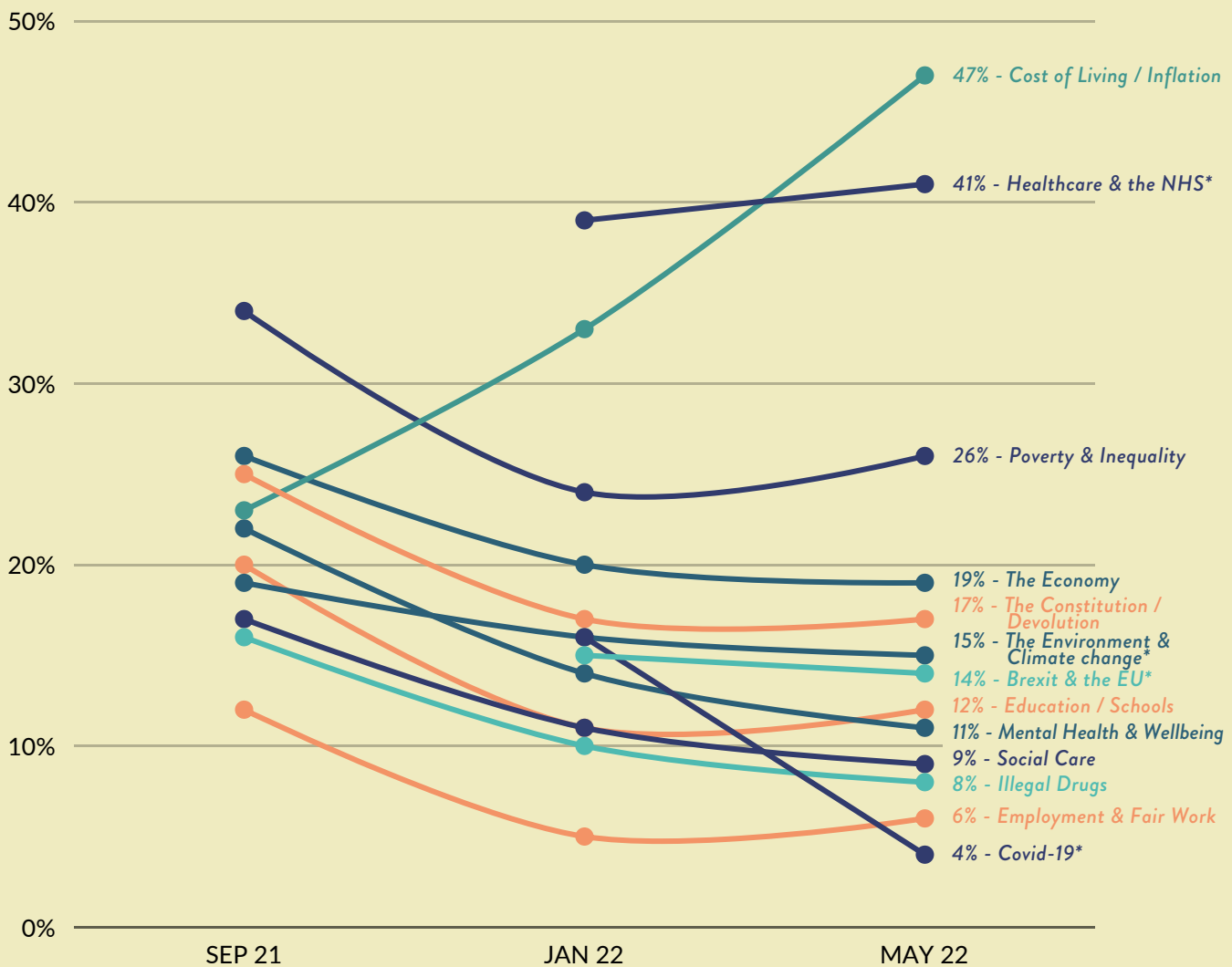
Poverty and inequality have maintained their position in third place, though this issue appears to have waned marginally in importance since October. However, concern over this (and other day-to-day issues) remain high in more disadvantaged neighbourhoods – with 30% of those in SIMD quintiles 1 and 2 rating this a top issue – and in urban areas.

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## PRIORITIES & ISSUES OVER TIME

Proportion of respondents citing each matter as one of the top 3 issues facing Scotland



And what do you think are the three most important issues facing Scotland today? (Not all answer options shown)  
 N.B. An asterisk denotes a new or changed answer item since the first wave in September 2021

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Respondents in the most deprived communities were also more likely to prioritise housing (13%) and employment/fair work (11%), and half as likely as the population at large to cite the economy as a top concern. The unemployed, inactive and unable to work largely shared these concerns, as well as prioritising mental health and wellbeing.

Younger respondents show a clear concern for the environment and climate change, with 16-34 year olds more than twice as likely (26%) as any other age band to cite this as a top issue. However, among the wider population, the proportion citing the environment as a top issue has fallen from 19% in the run up to COP26 to 15% this month.

A similar trajectory can be seen for constitutional and economic debates, which have fallen in salience. The proportions citing these as top issues facing Scotland have fallen from 25% to 17%, and from 26% to 19% respectively over the same time period, as other, arguably more pressing, concerns have supplanted these.

Perhaps surprisingly, foreign affairs and defence (a new addition for this wave in light of the situation in Ukraine) ranks very low among people's concerns, with only 1% of respondents deeming this a top priority.

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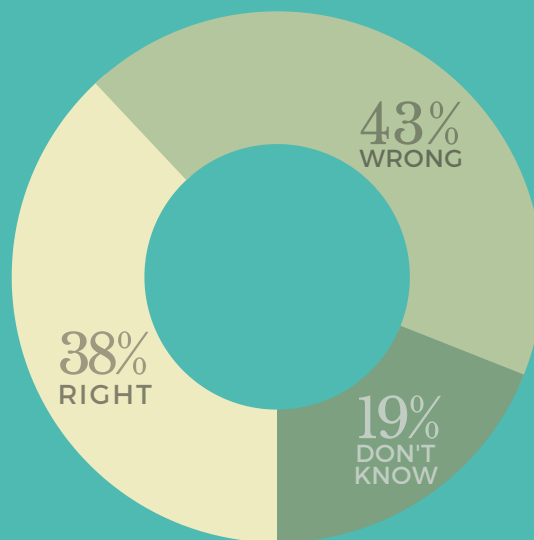
# SCOTLAND'S DIRECTION OF TRAVEL

Of those expressing an opinion, a majority (53%) believe that things in Scotland are heading in the wrong direction. This figure has grown sharply over the past quarter, rising by 11 percentage points since January.

This is the first time that our polling has registered a relative majority saying that things in Scotland are getting worse (by a margin of 6 percentage points).

The optimism that people had in January as Scotland was beginning to move out of the pandemic appears to have waned.

Younger people, female respondents and people living in more deprived areas were more likely to say that Scotland was on the right track, while more affluent respondents were more inclined to say things were getting worse. Approximately half of male respondents and those aged over 35 also believed things to be going in the wrong direction.

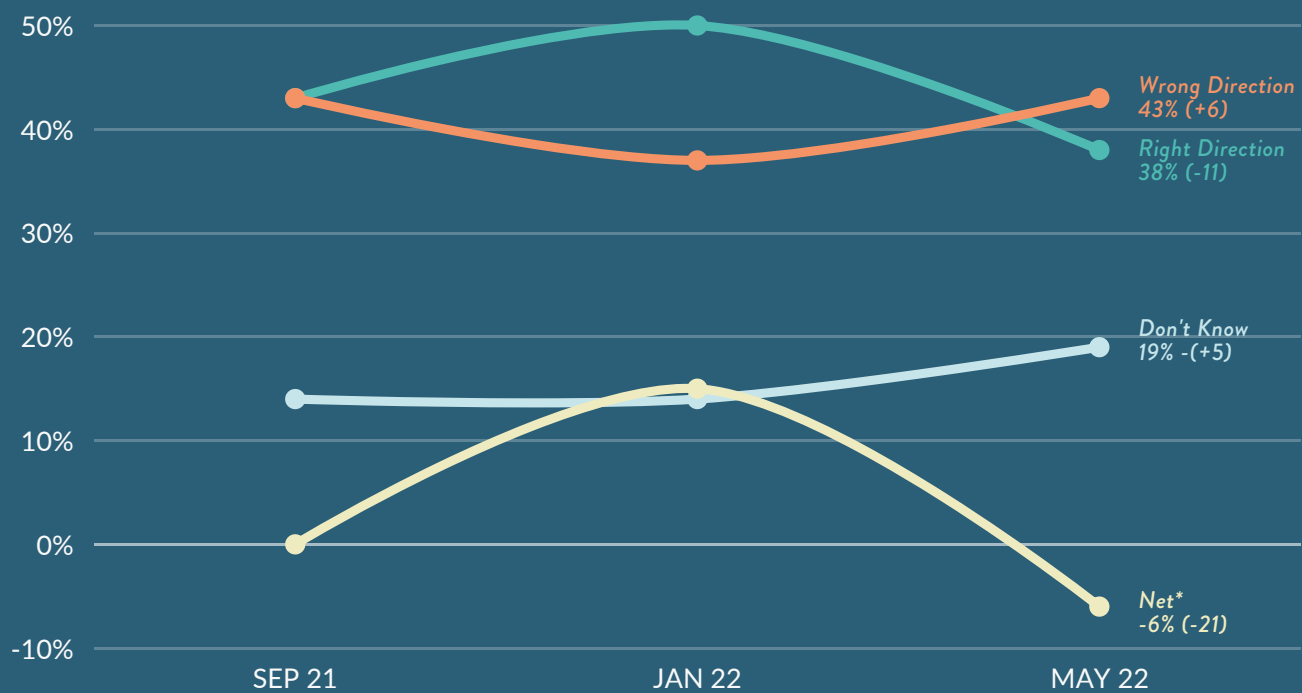


*Generally speaking, do you think things in Scotland are heading in the right direction or the wrong direction?*



## SCOTLAND'S DIRECTION OF TRAVEL

Proportion of people saying that things in Scotland are going in the right and wrong direction



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

\* Net of the proportion saying 'Right' minus the proportion saying 'Wrong', excluding those answering 'Don't Know'

Changes in brackets since January 2022



## TECHNICAL DETAILS

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The survey was designed by Diffley Partnership and invitations were issued online using the ScotPulse panel. Fieldwork was conducted between the 5th - 9th May 2022, and received 2,170 responses from the adult population, aged 16+, across Scotland. Results are weighted to the Scottish population (2020 estimates) by age and sex.



## FIND OUT MORE

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

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







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