

State of the Union



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ONWARD >

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Summary of the argument



The issue was meant to have been settled for at least a generation. But, six years on from the Scottish Independence referendum, the future of the Union is once again in doubt. In the past year, support for independence appears to have gained ground in each of the devolved nations. Nearly two dozen successive polls put independence ahead in Scotland, reversing the ten-point margin for remaining in the UK in 2014. While Yes support has fallen in several recent polls, support for independence is around 15 points higher than it was before the 2014 referendum campaign. Further surveys have shown high levels of support for a United Ireland and independent Wales.

The impression often left is that break up is inevitable: that it is only a matter of time; of when, not if. This narrative is not only historically dubious - the Union has survived worse challenges during its three-hundred-year-old history - it also risks becoming a self-fulfilling prophecy. The reason that proponents of independence tend to focus obsessively on constitutional issues is precisely because when the *issue* of independence rises in salience, *support* for separation also rises. The last twenty years of Scottish politics bear this out.

But while there has been considerable commentary about the ripples on the surface of the Union, there has been relatively little exploration of the powerful currents moving underneath. Until now we have not really known what issues, or which voters, are driving the surge in separatism. We have had limited evidence about how voters feel when they think about independence versus continued union, and what factors might make them more or less likely to vote for either. While we know that national identities and values vary between different parts of the UK, we do not know how these cultural factors interplay with constitutional reform. And we know even less about whether the coronavirus pandemic has reinforced the benefits of partnership, or fostered doubts about the risks of dependency.

This study, drawing on one of the most comprehensive surveys of public attitudes towards the UK and independence to date, seeks to answer these questions and provide a deeper understanding of what is driving our country apart - in the hope that it will help policymakers to stitch it back together. In partnership with Hanbury Strategy, we polled nearly 6,500 people in all four nations of the UK over three surveys between the middle of February and the first weekend in March. This included polls before and after the First Minister gave evidence to the Scottish Parliamentary inquiry, giving an early glimpse at how that issue has affected support for independence.

The findings reveal, first and foremost, that there is all to play for. But they also show that sustained and deliberate action will be needed to push back the tide of separatism and unite the United Kingdom after one of the most devastating crises in our collective history. We find that:

- **Public opinion is extremely volatile.** Support for independence has gained rapidly and remains intolerably high, but there are signs it is fragile. Between the end of February and the first weekend in March, the independence lead fell from 12 points to five, as Yes

support shifted from 56% to 53%. This volatility is particularly driven by low-turnout groups such as 18-25 year-olds, female voters and working class voters. It appears that SNP division is seeding doubt about independence at the exact moment that vaccines are demonstrating the benefits of partnership within the Union.

- **Cultural and demographic change are militating against the Union.** Scottish separatism is being fuelled by a rising Scottish identity which is distinct from, and in some ways oppositional to, Britishness, and which perceives the direction of the UK as antithetical to Scottish values. It has a receptive audience in younger voters - 18-24 year-olds are six times more likely to be Yes voters than those over 65 years old - who are becoming more electorally important over time. Worryingly, these trends are starting to become visible in Wales as well as Scotland. The Union will be secured when national identities can be genuinely reconciled with a broader, complementary British identity.
- **Support for another Scottish referendum is highly contingent on events.** There is no clear mandate for a Scottish referendum any time soon: more voters want a referendum after 2027 or never than in the next two years. Scottish voters, including Yes voters, want both the immediate health crisis and the longer-term economic crisis to have abated before the constitutional question is revisited. Even though many Scots think it is Scotland's choice, and that many issues would be handled better if Scotland was independent, another referendum is not seen as a priority. On every major policy issue, a majority of Scots - and around a third of Yes voters - would prefer the UK and Scottish Governments to work together within a reformed UK, rather than for Scotland to become independent or the UK Government to take more control.
- **The UK Government's response to the SNP's referendum plan is the make-or-break moment.** There is a "first mover disadvantage" for both sides: the best way for the UK Government to inadvertently boost support for independence would be to refuse a referendum outright; the best way for the Scottish Government to boost support for the Union would be to hold a unilateral vote. Unionists should avoid denying Scotland its right to decide its own future, and instead reiterate what most Scottish voters themselves believe: that "now is not the time" and that repairing the economy and society after coronavirus must take precedence.
- **Nationalists may be their own worst enemy.** A short-sighted focus on constitutional reform from nationalist parties may backfire. Scottish voters do not want a unilateral referendum of the kind proposed by the Scottish Government and three-fifths think that a focus on constitutional issues has distracted from schools and healthcare. If Scotland were to vote for independence, 57% of voters say they would miss funding for the NHS, 40% would miss the ability to travel and work freely within the UK and 38% would miss a shared British identity.

This study demonstrates that the Union will be secured primarily through voters' hearts, rather than their heads. The core long-term challenge is to reconcile the disparate identities of the United Kingdom with a shared sense of Britishness, especially for newer generations. This will not be achieved by antagonism or simply asserting the supremacy of the UK. Scots (or Welsh or Northern Irish voters for that matter) do not want to be told what is good for them, or to be refused their right to choose. Tone matters. Project Fear will not work. Far better to highlight the benefits that all citizens share within the UK than the risks that devolved nations face if they choose to go it alone. These are the lessons for the Unionist side. There remains all to play for.

State of the Union



In the last year there has been growing disquiet about the state of the Union. Over nine months between June 2020 and February 2021, twenty-one consecutive polls recorded majority support for Scottish independence, although in the last month this lead has been reversed in repeated polls.¹ Meanwhile polls in other parts of the UK have suggested high levels of support for separatism in Northern Ireland and Wales, as well as increasing calls for devolution in England. The pandemic has also highlighted the differential impact of devolution, and exposed at times sharp policy differences between different parts of the UK. Having endured as a successful multi-national democracy since the 1707 Act of Union, surviving two World Wars, the end of Empire, globalisation and the transition to a multicultural society, the United Kingdom is increasingly threatened by break up.

This chapter explores headline attitudes towards the Union based on a comprehensive multi-wave poll of voters in Scotland (12 Feb - 1 March, n=3,946; 5-7 March, n=1,502), held on either side of the Salmond and Sturgeon testimony, and a parallel poll of voters in the rest of the UK (n=995, 12 Feb - 1 March). With a combined sample of nearly 6,500 people, this is likely to be the most comprehensive survey of public attitudes towards the Union since the 2014 referendum. Subsequent chapters explore the drivers of this changing opinion, the voting groups most critical to securing the Union, and the events and actions that would undermine separatism and begin to unite our country as we emerge from the most devastating economic and health crisis in living memory.

Our polls confirm fears that the Union is under threat, both from majority separatism in Scotland and from high support for independence elsewhere. We find that:

- Support for independence is at historical highs. In our first wave poll, 56% of Scottish voters said they would vote Yes and 44% would vote No if a referendum were held with the question: “Should Scotland be an independent country?”.² This is broadly in line with contemporaneous polls showing rising support for independence, although the 12-point margin is at the higher end of the spectrum (see Figure 1 below). 7% of voters are currently undecided when filtered for likelihood to vote.
- But it is also extremely volatile. In our second wave poll, conducted a week later, the Yes lead fell by 5 percentage points driven in large part by a 9-point swing among women and a 25-point swing among 18-24 year-olds towards No. This was the week that Nicola Sturgeon gave evidence to the Scottish Parliament inquiry into the Salmond trial, suggesting that division within the independence movement is affecting vote intention.

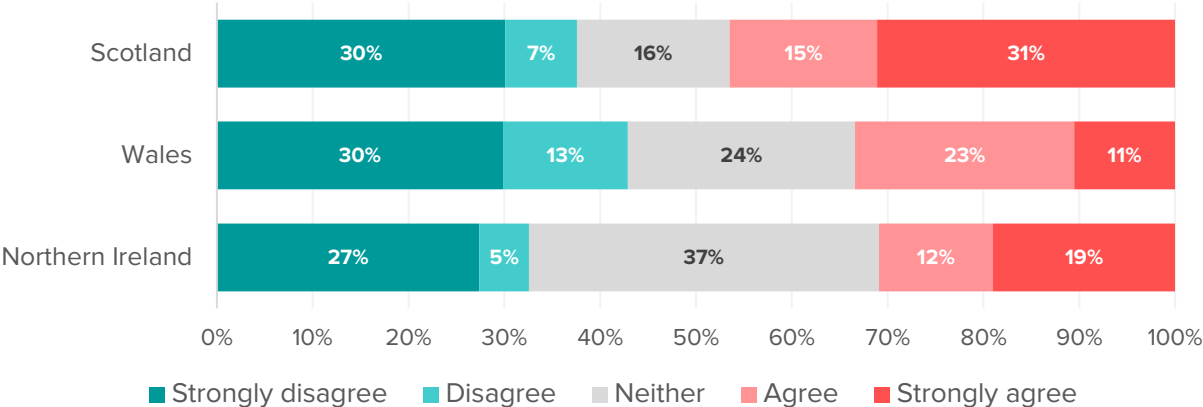
This reflects high levels of support for independence in all parts of the United Kingdom. When asked the extent to which they support the principle of independence, a substantial minority of voters in each of the devolved nations now supports independence from the United Kingdom:

- 46% of voters agree with the statement “Scotland should be an Independent Country” compared to 38% who disagree. This issue is highly polarised within Scotland, with 31% of voters strongly agreeing and 30% of voters strongly disagreeing. Only 16% of voters neither agree or disagree.
- 33% of Welsh voters agree that “Wales should be an Independent Country”, compared to 43% who disagree. However only 11% strongly agree, three times fewer than in Scotland, suggesting a less oppositional debate.
- 31% of Northern Irish voters agree that “Northern Ireland should be part of a United Ireland”, compared to 33% who disagree. More than one in three Northern Irish voters (37%) are undecided on the issue.
- 40% of English voters agree that “the UK should have a federal system in which Scotland, Wales, England and Northern Ireland make their own laws and set their own taxes, but share power over defence and foreign policy”, compared to just 19% who disagree. This compares to 33% in Wales, 30% in Northern Ireland, and 46% in Scotland.

These results are strongly reflected in party preference. More than 4 in 5 (82%) of 2019 SNP voters believe that Scotland should be independent, whereas a similar proportion of Conservative voters (83%) believe the opposite. 60% of Green voters support independence while the same proportion of Liberal Democrats support the Union. The Labour Party is remarkably split, with 48% of Labour voters agreeing that Scotland should be independent on principle. Around one in seven (14%) 2014 Yes voters now disagree that Scotland should be independent, while the same share (16%) of No voters now agree.

Figure 1: How much do you agree with the following statement: “Scotland/Wales/Northern Ireland should be an independent country/part of a United Ireland”

Source: Hanbury, 12 Feb - 1 March, Scotland and Rest of the UK, Onward analysis



Box 1: The rising tide of Scottish nationalism

After Irish separation in 1920-21, political nationalism was something of a minority pursuit within the remainder of UK until the late 1960s. Not even John MacCormick, the founder of modern Scottish nationalism, believed in independence: he founded the SNP in 1934 as a Home Rule movement and in 1949 gathered two million signatures for a Scottish Parliament subordinate to the UK Parliament.³ Even after the SNP started competing elections as an explicitly separatist force in 1945, support for independence grew only slowly. In 1955, the party gained just 0.5% of the Scottish vote.

But between the late 1950s and the 1970s, support for Scottish autonomy grew. In 1970, the SNP won 11% of the Scottish vote, before promptly tripling its vote share to 30%, and 11 seats in Parliament, by October 1974. The rising tide of separatism was enough to prompt Edward Heath to declare in 1967 that “nationalism is the single biggest factor in our politics today” and Harold Wilson to establish a Royal Commission on the Constitution in 1968.⁴ Its final report, in 1973, meant that devolution continued to dominate British politics and in 1979, 1.25 million people (52% of turnout, 32.9% of all voters) supported devolution in a referendum, although this fell short of the 40% threshold introduced by the Cunningham Amendment.⁵

Under Margaret Thatcher, devolution fell into abeyance as an issue of government but gained traction through opposition parties. Between 1979 and 1988, support for independence rose from 20% to 35% in MORI polls, while support for devolution fell from 52% to 42%.⁶ In 1988, the Claim of Right established the 1989 Scottish Constitutional Convention. This declared that sovereignty lay with the Scottish people not Westminster and issued two reports, in 1990 and 1995, which laid out the scheme for a Scottish Parliament eventually backed in the 1997 referendum, by a margin of 74.3% to 25.7% on a turnout of 60%. 44% of Scottish voters had backed devolution, with 38% (63.5% of turnout) agreeing the Parliament should have tax raising powers. In 1997, the British Election Study estimated support for independence had fallen to 14% compared to 55% for devolution.⁷

Between 1999 and 2012, support for independence fluctuated between 25%-30%. This ended with the 2012 Edinburgh Agreement, which set out the terms of the 2014 referendum. This can be seen as the key turning point in recent Scottish attitudes, when the rising salience of the issue of independence itself helped to solidify support for separatism. Despite Yes being defeated by 10 points in 2014, support for independence has not subsided to its pre-referendum level and sits at roughly twice its pre-2012 level of support today.⁸

After the Scottish Referendum in September 2014, Yes support gradually declined in representative polls until early 2018, when it started rising again to overtake No in early 2020. Looking at an average of all published polls since 2019, Yes support is 52% and No support is 48%.⁹ This is close to twice the average level of support for independence in the decade leading up to the 2012 Edinburgh Agreement.¹⁰

Figure 2: Historical support for different constitutional options in Scotland, 1999-2019

Source: Scottish Social Attitudes survey, Onward analysis

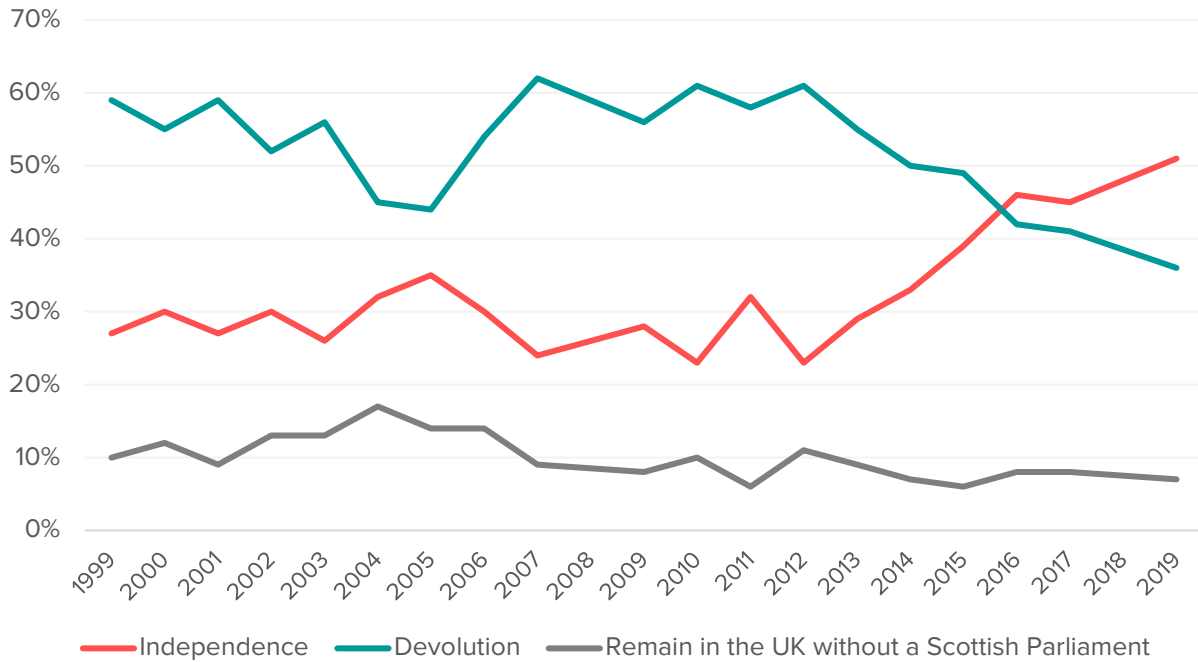
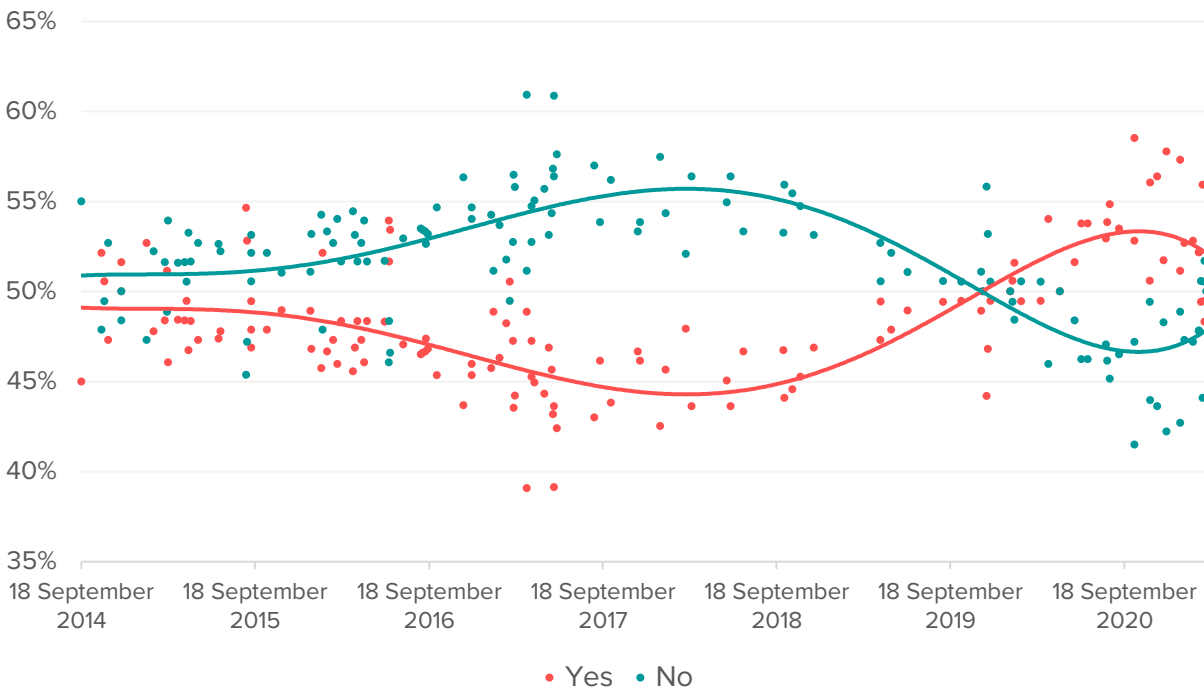


Figure 3: “How would you vote in a future referendum if the question were ‘should Scotland be an independent country?’”, 2014 - Present day

Source: Onward analysis of published polls



Likelihood and timing of a referendum

Despite overall support for both the principle of independence and headline vote intention in another referendum being pro-independence, most people in Scotland do not want a referendum any time soon.

- In our headline poll, we find that just 35% of Scottish voters would like a referendum this year (13%) or next year (22%). This compares to 38% of voters who want any referendum to be held in 2027 or later (15%) or never (23%). The remaining 26% of voters want a referendum during either 2023-24 (19%) or 2025-26 (7%). This suggests that more voters want a referendum after 2027 than want one within the next two years.
- This lack of urgency holds true for all demographic breaks and most political groups. No age group, ethnicity, gender, social class or region of Scotland has a majority in favour of a referendum in the next two years, and barely 1 in 4 current Yes voters (27%) would like a referendum this year.
- The only political groups with majority support for a referendum within the next two years are SNP voters (61%) and 2014 Yes voters (56%). The vast majority of Conservative (91%), Labour (72%) and Liberal Democrat (80%) voters want a referendum postponed until after 2023 (or never). The Green Party is split 50/50 between wanting a referendum before or after 2023. When the data is split between pre- and post-2024, to reflect this Parliament or the next, we can see that the Labour and Liberal Democrat parties become considerably less united, with 49% of Labour voters wanting a referendum before 2024.
- When asked how likely a Scottish referendum is in the next ten years, 62% of voters in Northern Ireland, Wales and England believe that a referendum will be held within a decade, compared to just 9% of voters who think it is unlikely. One in four voters (26%) believe that a referendum is “very likely” within this timeframe. Labour (71%) and Remain (72%) voters are more convinced than Conservative (66%) and Leave (61%) that a referendum is likely within ten years, and more than three in every four (77%) voters born in Scotland but living elsewhere in the UK agree. However, it should be noted that this is not new. In 1999, the Guardian carried an “bombshell” poll that showed 53% of British voters agreeing that Scotland should become an independent country within ten years.

Figure 4: Timing of a referendum, by future referendum vote intention

Source: Hanbury, 12 Feb - 1 March, Onward analysis

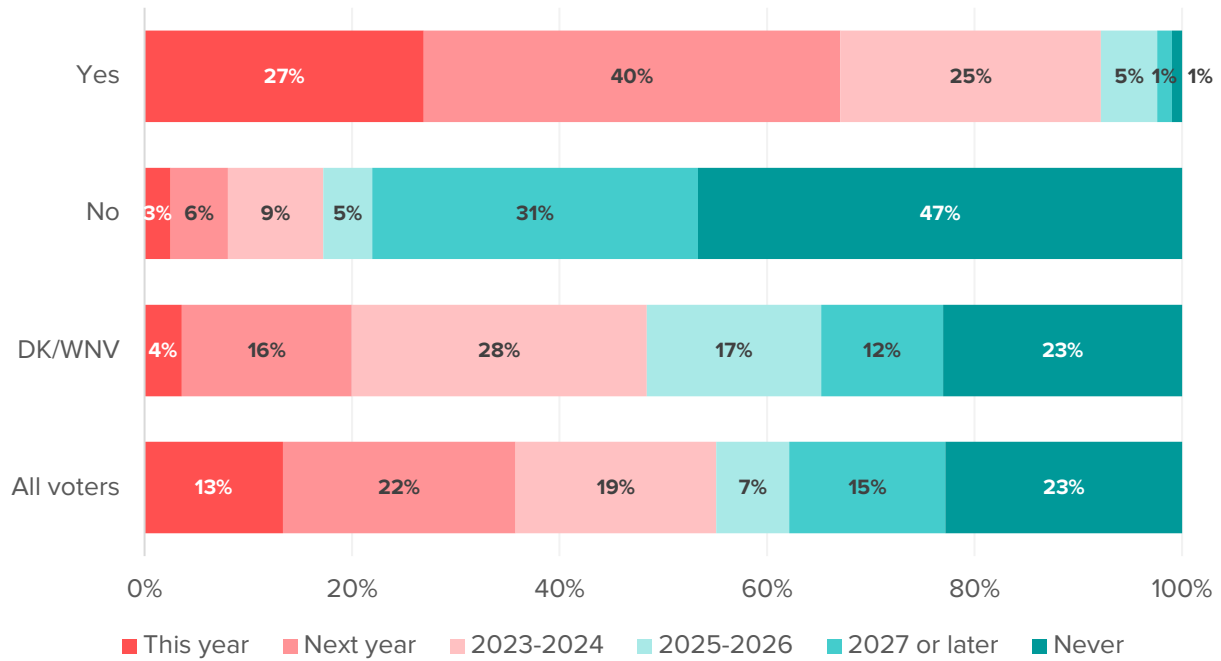
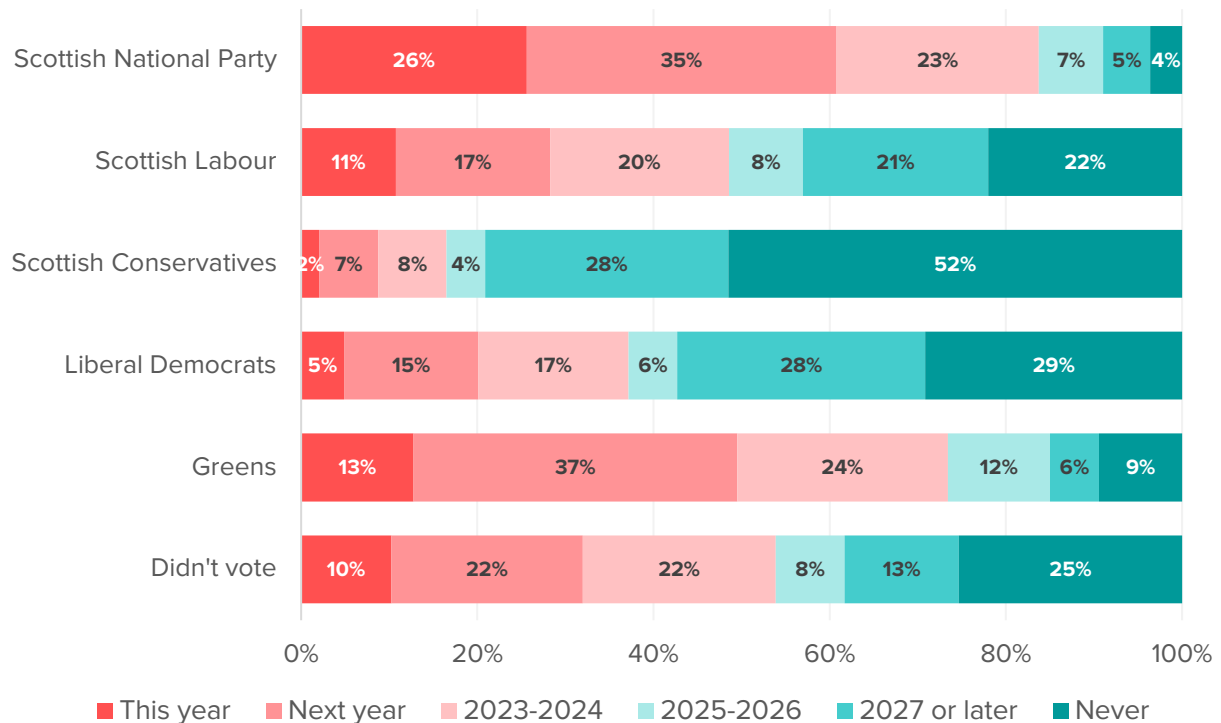


Figure 5: Timing of a referendum, by 2019 General Election vote

Source: Hanbury, 12 Feb - 1 March, Onward analysis

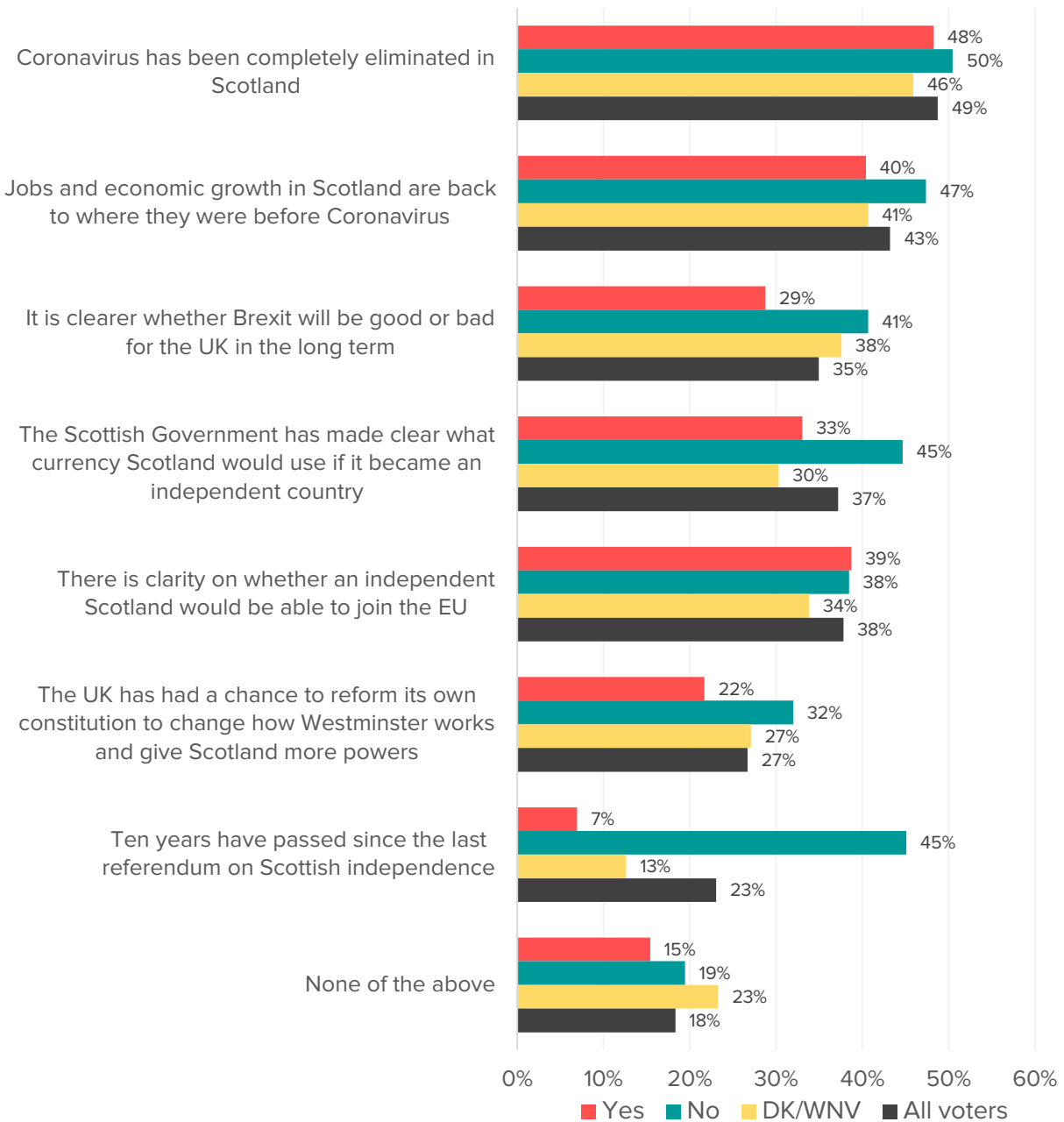


The lack of support for an immediate vote is reinforced when respondents are asked about the conditions that should be met before any referendum takes place. In addition to not wanting a referendum immediately, Scottish voters see any referendum as highly conditional on events, especially with regard to the pandemic and clarity about Scotland's future. When asked to name any condition that should be met before a vote is held:

- 49% of all Scottish voters, including 48% of Yes voters and 50% of No voters, think that “Coronavirus should be completely eliminated in Scotland” before a referendum is held. It is clear that, however much they may support independence in principle, Scottish voters want politicians to focus on the immediate crisis of the pandemic, rather than independence.
- 43% of voters, including 40% of Yes voters and 47% of No voters, think that “Jobs and growth in Scotland should be back to where they were before Coronavirus”. This suggests that voters see the economic consequences of the pandemic as nearly as important as the public health impact in deciding the timing of any referendum.
- 38% of voters want “clarity on whether Scotland would be able to join the European Union”, notably the only condition that Yes voters chose more than No voters. 35% of voters want clarity on “whether Brexit will be good or bad for the UK in the long term” before any vote is called. A further 37% of voters want the Scottish Government to make clear which currency would be used in the event of independence. Notably 45% of No voters want ten years to have passed before the question is asked again. Voters want further clarity before another referendum.

Figure 6: “If there were a referendum on the future of Scotland within the UK, what conditions do you think should be met before it happens?”

Source: Hanbury, 12 Feb - 1 March, Onward analysis



Conclusion

These findings underline the extreme fluidity of the Scottish electorate. While support for independence is near an all-time high, it is fragile and subject to rapid change. The fact that the Yes lead dropped five points in the space of a week demonstrates that the trend towards independence is not inexorable, especially given that it was driven by the voter groups - women, 18-35s, working class voters - who have driven the rise in support for Scottish independence since 2014.

This data also underscores that voters do not want a referendum any time soon. This is not to deny the possibility of, or support for, a referendum entirely. There is currently a slim majority of support for the principle of independence. More Scottish voters want a vote in this Parliament than not, and most voters in the rest of the UK agree that a referendum is likely in the next decade.

But it is clear that Scottish voters do not want a referendum on anything like the timetable set out by the Scottish Government, who have suggested that a referendum could be held “as early as late 2021” and pledged to hold one without the agreement of the UK Government.¹¹ Scottish voters see a referendum as not merely time-bound but *contingent* on the changing circumstances around coronavirus, and want the immediate risks to public health and economy dealt with before any referendum is scheduled.

Causes

Who and what is driving independence?



If we know that public opinion is increasingly leaning towards independence, there is less understanding of what is driving this shift. Academics and political scientists have put forward various hypotheses, including: the cultural dislocation of Brexit; the contrast between UK government leadership and devolved governments, especially in Scotland and especially during the pandemic; and a growing polarisation between British and national identity.

This chapter attempts to understand what is at play, looking at support for independence through demographic, cultural and political lenses. We look not only at overall levels of support but at specific voting groups, including those who have switched from Yes to No, and those who do not know how they will vote, and consider how voters in all four nations of the UK would feel if Scotland were to vote to leave the UK.

The demographics of independence

In the 2014 Scottish Referendum, support for independence was correlated with age, gender, social grade and perceived identity. Young people, men, working class voters and those who identified as “Scottish but not British” were most likely to have supported independence. This was reflected in both contemporaneous snap polls, such as Lord Ashcroft’s eve of vote survey, and the more comprehensive Scottish Referendum Survey, published six months later.¹²

With the notable exception of gender, these results are reflected in our Wave 1 poll today, whose large sample allows us to interrogate demographic and cultural effects with greater confidence. However, since 2014, many of these differences have become considerably wider, suggesting a polarisation of the Scottish electorate on the issue of independence. Figure 7 below sets out the change in Yes lead between 2014 and our poll in 2021. The shifts among 18-35s and C2DE voters are the most striking.

1. Age

- The age curve has steepened considerably since 2014. While 16-17 year-olds appear to have become marginally less likely to support independence, 18-24 and 25-34 year-olds have become considerably more likely. Six years ago, 18-24s were 4 percentage points more likely to vote No (52%) than Yes (48%). Today the Yes lead is 64 points among 18-24s, with 82% saying they will support independence. Among 25-34s, Yes support has grown from 59% to 81%, meaning the lead has risen from 18 to 62 points.¹³
- Older voters meanwhile have become marginally more likely to support independence but remain strongly opposed in net terms. In 2014, 27% of over 65s voted for independence; today, 29% say they will support Yes; among 55-64s, Yes support has risen by one point from 43% to 44%. There has been a much larger movement among 35-55s, a group which was marginally pro-independence in 2014 (52% Yes) and is now strongly separatist (61%).

Figure 7: Yes lead in vote intention between 2014 and 2021 wave 1

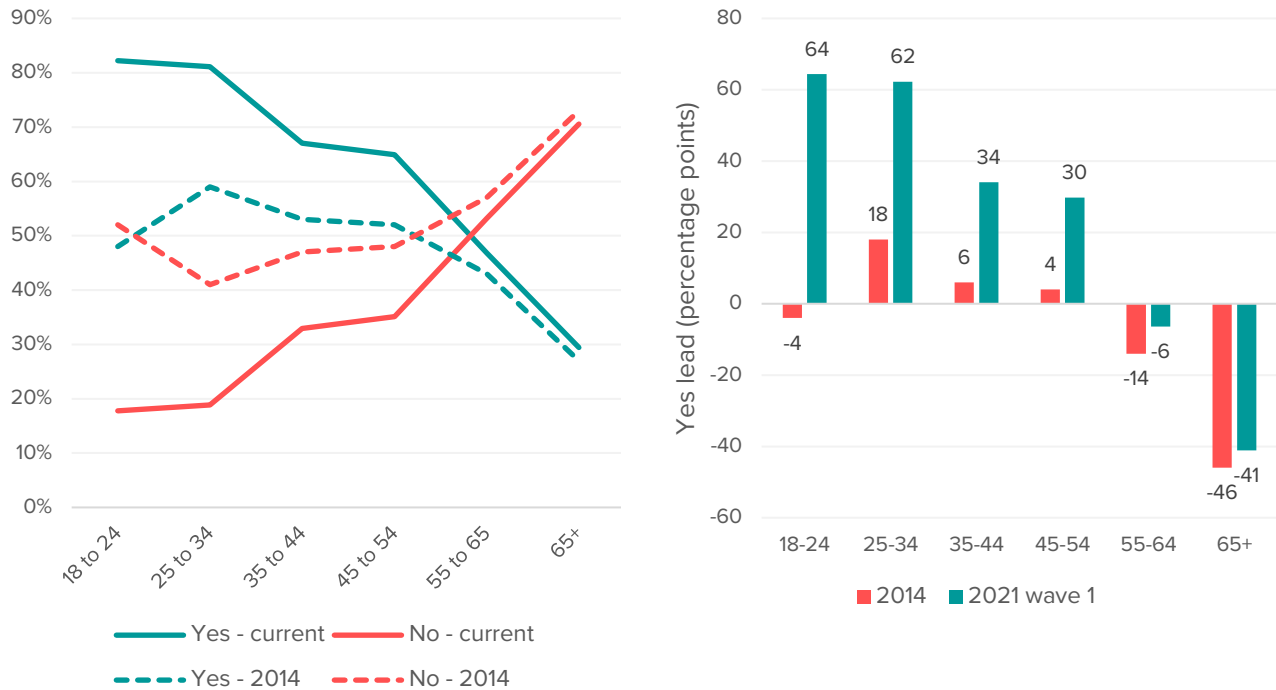
Source: Hanbury, 12 Feb-1 March and 5-7 March, Onward analysis



- These trends cannot be explained by the differences between polling methods. Looking only at recall vote (i.e. how people say they voted in 2014, we see the same pattern) 18-24 and 25-34 year-old voters recall a higher Yes vote in 2014 than reality (60% and 71% respectively) but these recalled votes are still 22 and 11 percentage points below how they say they would vote today. This confirms that there has been a significant movement among these cohorts in the intervening time. Older voters, meanwhile, would today vote almost exactly as they say they did in 2014.
- This pattern is also true in other parts of the UK. 48% of 18-24 Welsh voters and 53% of 18-24 year-old Northern Irish voters agree that their countries should be independent or reunified, respectively. A further 56% of 25-34 year-old Welsh voters are also pro-independence, although this is not replicated in Northern Ireland, where just 19% of 25-34s support the creation of a United Ireland. Older generations are much more pro-Union, with around two thirds of voters aged 35 or above supporting the Union.

Figure 8: Vote intention if a referendum were held tomorrow, Scotland, by age

Source: Hanbury, 12 Feb - 1 March, Onward analysis; Ashcroft (2014)



2. Social class, education and income

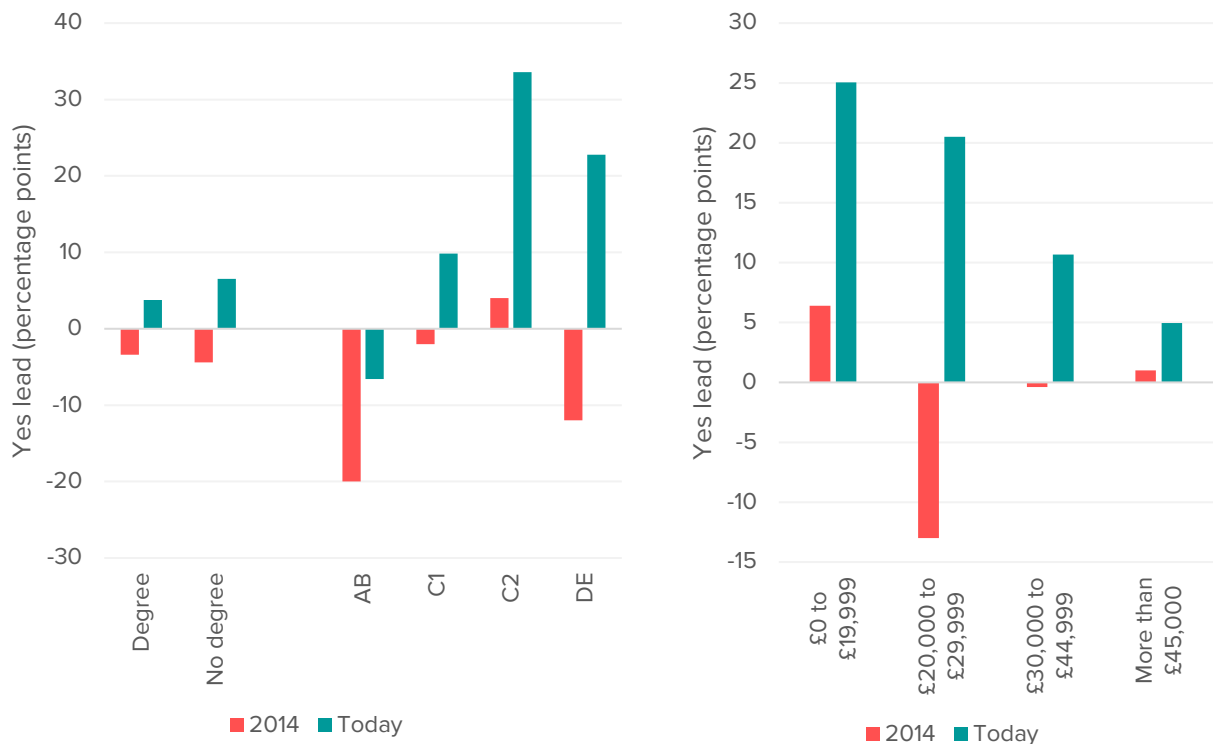
Social class was not hugely predictive of independence support in the 2014 Scottish Referendum. Working class voters were marginally more likely to vote Yes (54%) and middle-class voters were more likely to vote No (58%), according to the Scottish Referendum Study.¹⁴ On the eve of the poll, Lord Ashcroft’s survey found that ABs were strongly pro-Union (60%) and C1s and DEs were marginally so (51% and 56% respectively), while C2 voters voted 52% for independence. Nor did having a degree make people substantially more or less likely to support independence: both graduates and non-graduates marginally backed staying in the UK. In the intervening time, class appears to have become more of a dividing line. We find that:

- Scottish voters describing themselves as “working class” are significantly more likely to support independence today than they were in 2014. 64% of working-class voters would support independence if a vote were held tomorrow, 10 points higher than the 54% who voted Yes in 2014. Middle class voters, meanwhile, would vote exactly as they did in 2014, with 59% of voters voting No today compared to 58% in 2014.¹⁵ In Wales, 36% of working-class voters support independence in principle, compared to just 19% who support reunification in principle in Northern Ireland.

- Looking by social grade, we can see that all grades have become more pro-independence since 2014, although AB voters remain marginally supportive of staying in the UK. C1 voters and DE were both pro-Union in 2014 and are now pro-Independence. The Yes vote now leads No by more than 30 points among C2 voters and by more than 20 points among DE voters. This suggests a significant shift among lower social grades in the last six years.
- Notably, those who define themselves as Upper Middle Class or Upper Class and those who earn over £60,000 a year are now considerably more likely to vote for independence: 56% of those earning £60-100,000 a year would vote Yes and 61% of those who describe as Upper Class would do the same. This suggests that the Yes vote is successfully uniting richer and poorer voters in an alliance that was not present in 2014.
- People without a degree are also now more likely to vote Yes. Both groups were marginally in favour of staying in the UK in 2014. Today, 57% of non-graduates would vote Yes, up 9 points, while graduates have changed their vote less dramatically, from 47% Yes in 2014 to 54% today. This appears to be part of the broader shift from No to Yes rather than driven by any wider factors.

Figure 9: Yes lead by education, class and income, 2014 and today

Sources: Hanbury (2021), Ashcroft (2014), Scottish Referendum Study (2015), Onward analysis



3. Ethnicity

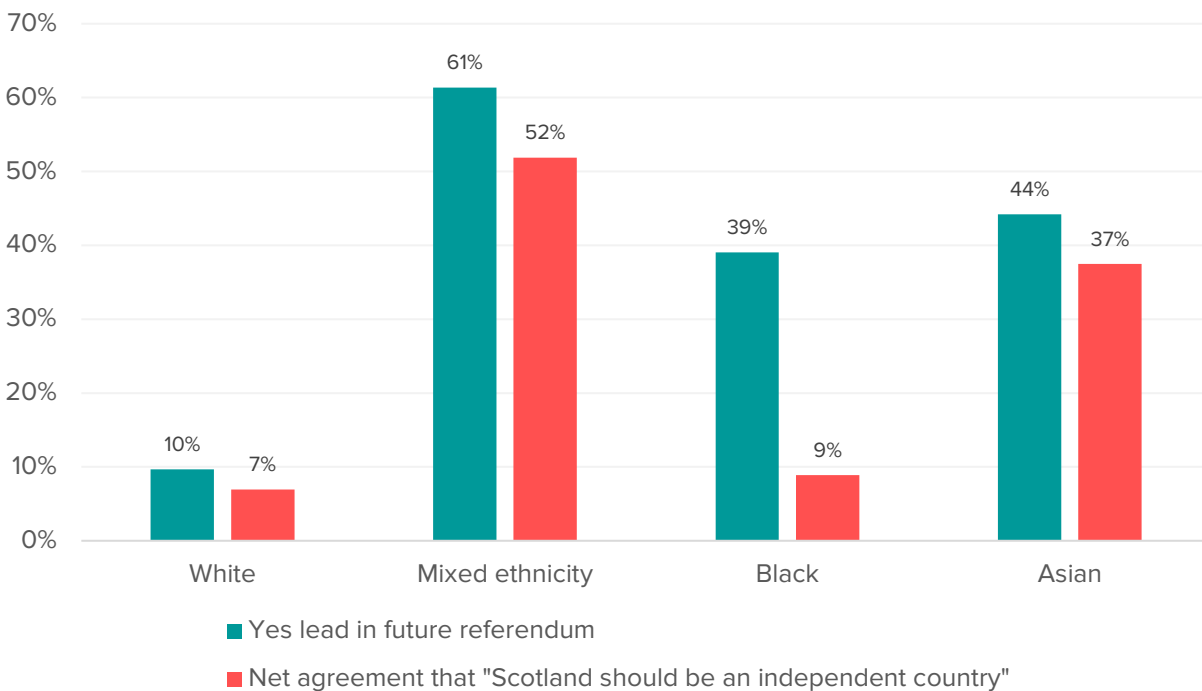
Scotland has become considerably more ethnically diverse in recent decades. Between the 2001 and 2011 censuses, the share of people who described their ethnicity as something other than “White Scottish” increased by 29%, to around 850,000 or 16% of the population, although around half of this total defined themselves as “White, other”.¹⁶ These trends have continued since.

In the run up to the 2014 vote there was heightened attention about how Black and Minority Ethnic voters may vote, with a general view that they would lean towards independence. However there appears to be limited public data to support this view. Within our Wave 1 poll, we have a large enough sample to accommodate a sizeable number of BAME voters (n=313), although the error margins will still be considerably larger than for most voter groups.

We find that BAME voters are 1.3 to 1.5 times more likely than White voters to say they will vote Yes in a future referendum. Yes leads by 10% among White voters and between 39% and 61% among BAME voters. White voters are also less likely to agree with the statement “Scotland should be an independent country”, suggesting that they are less pro-independence in principle as well as in practice.

Figure 10: Vote intention and support for independence in principle, by ethnicity

Source: Hanbury, 12 Feb-1 March and 5-7 March, Onward analysis



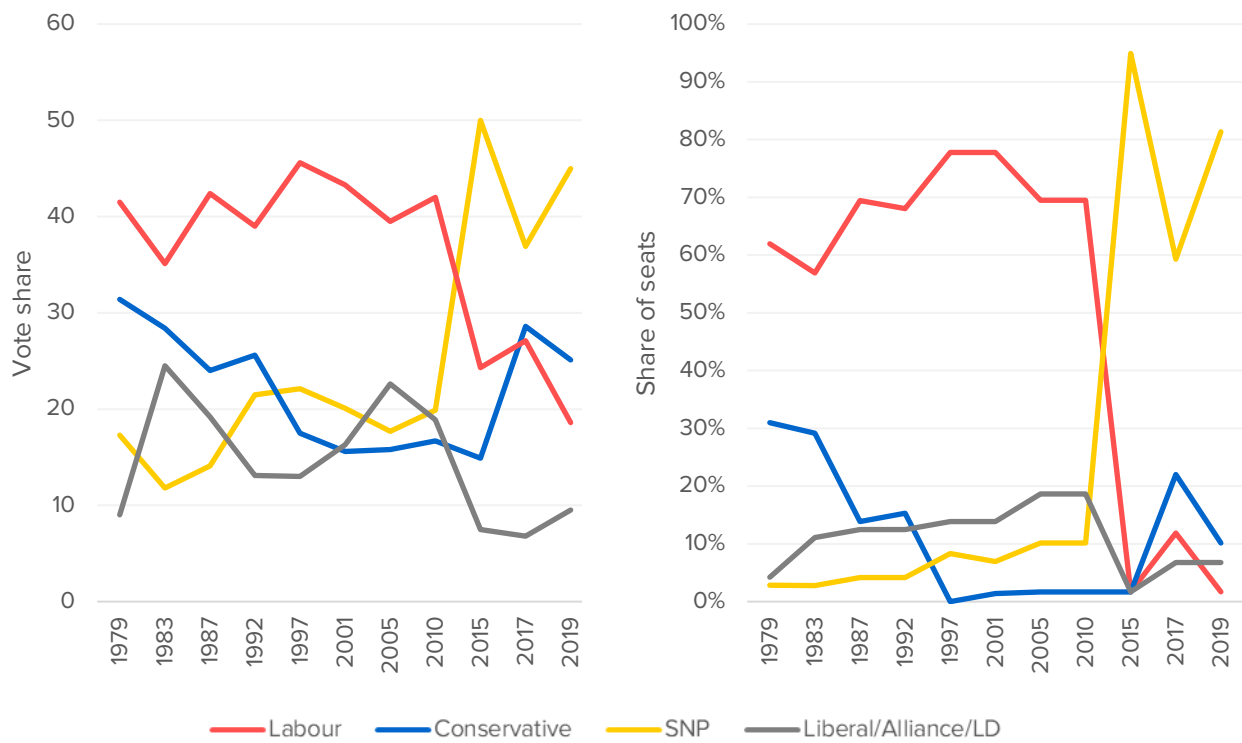
4 Political support

In addition to demographic and identity factors, independence support is strongly associated with other political choices that voters make at elections. This is not surprising given the strong association of some parties with independence and others with the Union. However, it may prove important as national parties decide how to manage the issue of independence in the coming years, reconciling policy and political instincts with their voter coalitions in different parts of the UK. We find that:

- In Scotland, SNP voters are unsurprisingly likely to vote Yes in any future referendum (91%), while Conservative Party are equally likely to vote No (91%). Other parties are however split. More than a third (36%) of Labour voters intend to vote Yes, broadly similar to the 37% of Labour voters who voted Yes in 2014.¹⁷ Around a quarter (23%) of Liberal Democrat voters intend to vote Yes if there is another referendum, substantially lower than the 39% who voted Yes in 2014.
- The split within the Labour Party in Scotland may prove particularly significant. Labour has already lost considerable numbers of voters to the SNP due to conflicting national and political identities. As shown in Figures 11 and 12 below, the growth in SNP support at Westminster elections has come almost entirely at the expense of the Labour Party in the last twenty years. Since 2001, Labour has seen its seat count in Scotland fall from 56 seats and 43% of the vote, to 1 seat and just 10% of the vote in the last election.
- Looking at switchers - voters who historically voted for one party but would now support another - we see further evidence of this trend. While voters who have switched from other parties to the SNP tend to be only marginally more likely to vote Yes than not (54%), Labour switchers to the SNP are strongly pro-independence. 89% of Labour/SNP switchers would vote Yes in a future referendum, and just 11% would vote No.
- This reinforces the essential volatility of the Scottish electorate, which has seen several waves of defection from other parties to the SNP in multiple waves since 2014, and where voters appear to be switching their support between unionist and nationalist parties. This means that Scottish politics is becoming increasingly unpredictable, frustrating efforts to respond to separatism or create a coherent unionist voter coalition.

Figures 11 and 12: Changing vote share (LHS) and seats won (RHS) in Scotland, 1979-2019

Source: House of Commons Library



- There has been considerable commentary suggesting that Britain's decision to leave the EU has affected vote intention on independence.¹⁸ While this may be true in cultural and values terms (see Chapter 4), and Brexit itself may have been a catalyst for a hardening of independence support, it interestingly does not show up in headline vote intention.
- Overall, 60% of Remain voters say they would vote Yes if there were another referendum tomorrow, while 59% of Leave voters would vote No. When asked the extent to which they agree with the principle that “Scotland should be an independent country”, we find that 51% of Remain voters agree, while 51% of Leave voters disagree. Therefore, while Remain voters lean towards independence, and Leave voters lean the other way, the difference between the two groups is relatively small.

5. But which factors actually make a difference?

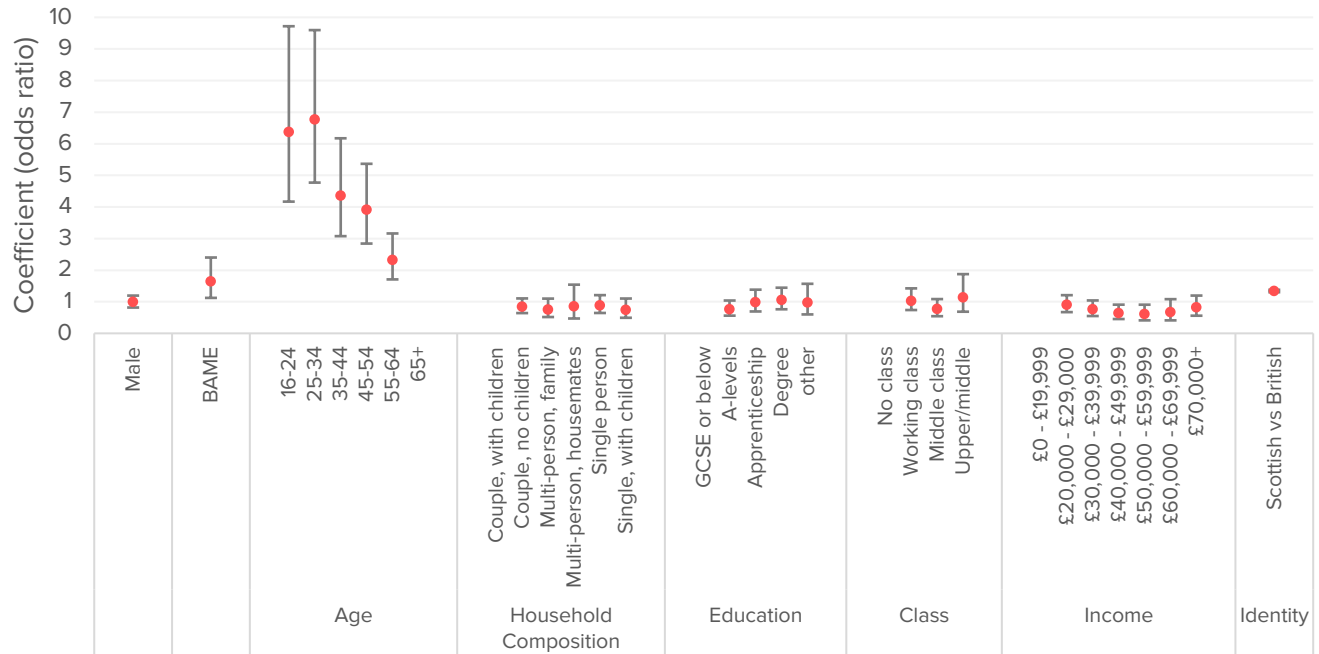
It can be unclear from high level polling data which of these factors are most likely to be driving support for independence. Running a logistic regression analysis of the data demonstrates which factors are statistically significant in terms of voting behaviour and which are less important. As shown by Figure 13 below, there are a few factors that – controlling for other characteristics – have a significant effect on vote intention. These are:

- Age. Younger voters are considerably more likely to support independence. Being aged 16-24, rather than over 65, increases the odds of voting for independence by a factor of 6.37. In other words, the youngest voters are six times more likely to say they will vote for independence in a future referendum than the oldest voters.
- National identity. The single biggest predictor of vote intention is how people define their nationality. We combine two questions that ask about strength of identification with Britain and Scotland. This new scale ranges from 0 (British, not Scottish) to 20 (Scottish, not British). A score of 10 would indicate that a person feels equally British and Scottish. We find that, for a one unit increase in identification with Scotland versus Britain, the odds of supporting independence increase by a factor of 1.34. We look at this in more detail in the Chapter 4.
- Ethnicity. BAME voters are 1.64 times more likely to say they will vote for independence than White voters, controlling for other factors, and recognising the higher margin of error given sample size.
- A potentially significant fourth factor is income. We can be confident that those with incomes between £40,000 and £60,000 are more likely to vote No in a future referendum than those earning less than £20,000. The effect of income on vote intention seems to be more u-shaped than linear, with higher support for independence at the bottom and top of the income scale. But the wider confidence intervals for those on the highest incomes could also be a function of smaller sample size.

The effect of national identity persists when controlling for age, although the curve for older age groups is shifted down slightly compared to younger generations. For those aged 16-24 and 25-34, the tipping point (the point at which they are more likely to vote Yes than No) is almost exactly at a score of 10. This means that young people who feel equally British and Scottish are equally likely to vote Yes as vote No. This is not the case for older generations: only once they reach a score of 16 or higher (significantly more Scottish than British) do over-65s become more likely to support independence. This tells us that older voters are significantly more pro-Union, even those who identify more with Scotland than Britain.

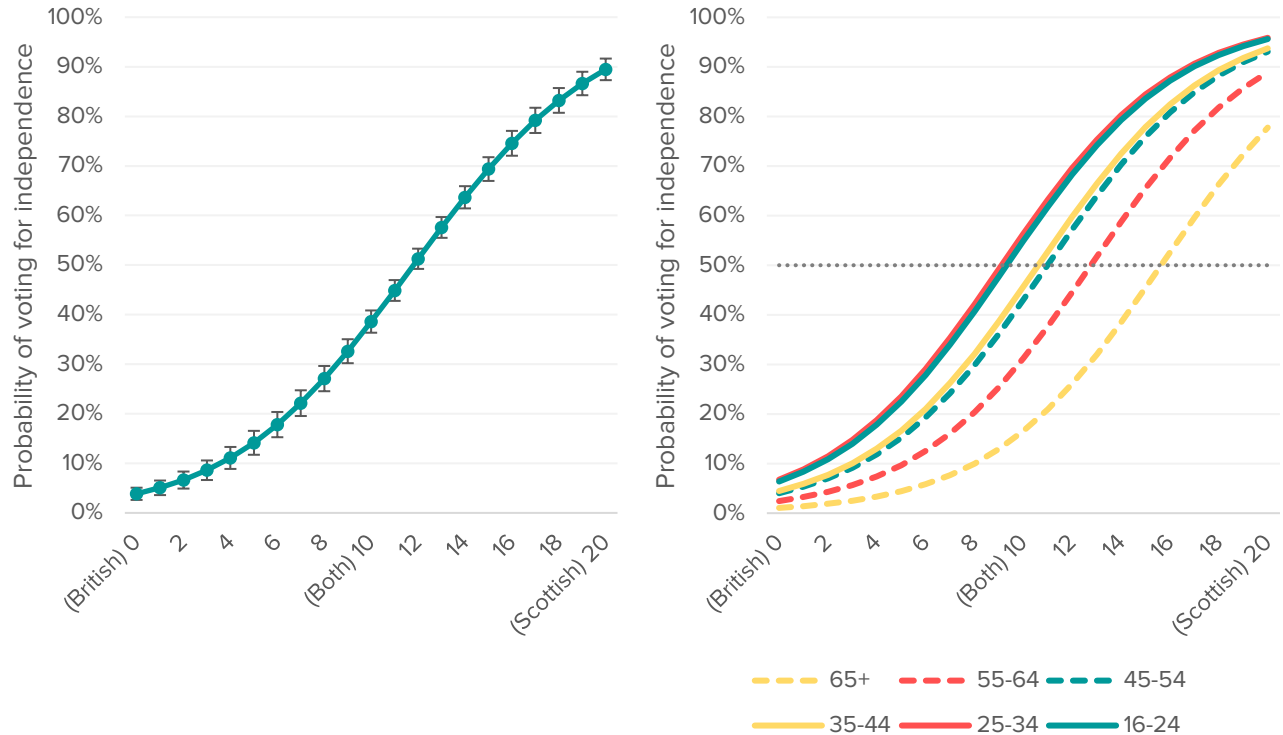
Figure 13: Regression analysis¹ of the statistical drivers of voting Yes in a future referendum.

Source: Hanbury, 12 Feb - 1 March, Onward analysis



Figures 14 and 15: The marginal effect of national identity on future referendum vote intention

Source: Hanbury, 12 Feb - 1 March, Onward analysis



¹ This graph presents the odds ratios from a logistic regression. All variables are categorical, except identity, which is a continuous scale ranging from 0 to 20. The value of 1.34 for identity means that we expect to see a 34% increase in the odds of voting Yes in a future referendum for each one-unit increase in identifying with Scotland rather than Britain.

Conclusion

The most important dividing lines in the referendum debate are age and national identity. If you are young, or define yourself strongly as Scottish, you are highly likely to support independence. If you are older and define your identity as both Scottish and British, you are likely to support continued membership of the United Kingdom. The debate is increasingly polarised between these two positions, in a similar way to how the Brexit debate became bifurcated between graduates and non-graduates.

However, Unionists should be concerned about the scale of the shift since 2014 among a number of key voting groups, including women, 18-24 year-olds and DE voters, all of whom have shifted from net support for No to being either marginal or pro-independence, even in our second poll. These typically low-turnout groups are exactly the voters who will decide the independence issue.

Contingencies

What might increase or reduce support for independence?



Previous chapters have exposed how support for independence is at historically high levels in Scotland, is rising in Wales and Northern Ireland, and is driven by specific voter groups - such as young people - which represent a growing share of the electorate.

But it also provides evidence that the break-up of the Union is far from inevitable. As set out in Chapter 2, support for independence fell from around 35% to around 14% between 1988 and 1997 and our second poll in Scotland underscores just how quickly polls can move back towards No. In the 2016 Scottish elections, the SNP were deprived of a majority, despite being widely expected to secure one. The Union has stood for three hundred years precisely because the UK has a constitution able to be adapted to changing historical circumstances.

The next year may well decide the fate of the Union. This chapter explores the short- and medium-term factors which may increase or reduce support for independence. It focuses predominantly in Scotland, but looks also at Wales and Northern Ireland to understand how rising separatism there can be addressed.

1. The battle for another Scottish referendum

The First Minister has made clear that she intends to hold another referendum in Scotland at the earliest opportunity. The Scottish Government will shortly introduce a Referendum Bill to force the issue of another referendum. This is contentious to say the least. Some argue that the Scottish Government is reneging on past commitments, including the description of the 2014 referendum as “a once in a generation opportunity” in its 2013 White Paper¹⁹ and the First Minister herself signing the Edinburgh Agreement, which described the 2014 referendum as offering a “fair and decisive outcome” to the issue of independence.²⁰

The Scottish Government have argued that a referendum is justified given there has been a material change in circumstances as a result of Britain leaving the European Union,²¹ a risk that was presaged about in the 2013 White Paper, and that Parliamentary sovereignty is “no longer an accurate description of the constitution in Scotland or the UK”.²²

The UK Government, by contrast, has argued that “now is not the time” for another referendum. The rationale for this is twofold: first, ministers have argued that not enough time has passed since the last referendum - just six years compared to the 17-18 years between the previous three constitutional referenda in 1979, 1997 and 2014 - and, secondly, because the current economic and public health emergency as a result of coronavirus should take precedence over constitutional debates.

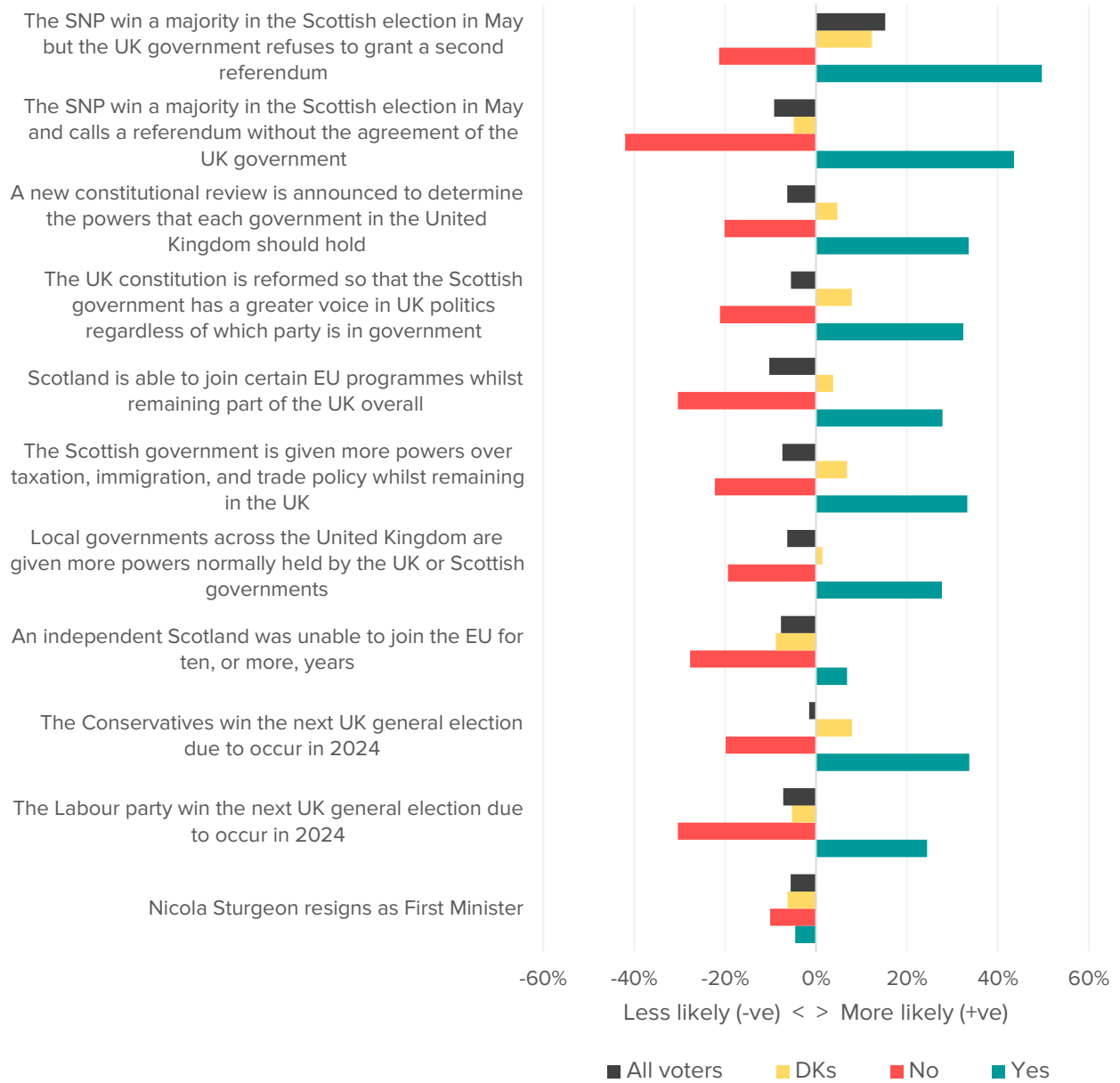
This argument has so far been had in theory. If the SNP secures a majority in May's Scottish Parliament elections, or if a pro-Independence majority is created with the help of the Scottish Green Party, this debate could quickly become the defining political challenge facing the UK Government. How will voters respond to different scenarios? What factors are likely to push support for independence up, or down? And how might voters feel in the event of a vote to leave the United Kingdom, not just in Scotland but in the rest of the UK?

This study reveals the high-wire politics for both the Union and Independence sides in the next few months:

- If the SNP secures a majority and the UK Government refuses a referendum outright, support for independence is likely to increase significantly. 35% of Scottish voters say that the UK Government refusing a referendum to a majority SNP administration would make them “much more likely” (22%) or “a little more likely” (13%) to vote Yes, compared to 19% who say it would make them less likely. This would harden the Yes vote (50% more likely) and push Don't Knows (12% more likely) to vote Yes. Labour voters would also be 9% more likely to vote Yes. This is the only scenario we tested where support for independence would rise.
- The opposite will happen if the SNP wins a majority and goes ahead with its plan for a referendum without the agreement of the UK Government. 33% of Scottish voters say that the SNP holding an unilateral referendum would make them much (20%) or a little (14%) less likely to vote Yes, compared to 24% who say it would make them more likely. 1 in 10 (10%) Yes voters and one in seven (17%) Don't Knows would be less likely to vote Yes in this scenario.
- Other scenarios would also reduce Scottish support for independence - but only marginally. For example, being able to join certain EU programmes while remaining in the UK then 10% of voters say they would be less likely to support independence, and 8% would be less likely to support independence if Scotland were not able to rejoin the EU for a decade. The two main proposals put forward to date - a constitutional review or greater devolution - both appear to have a marginal impact on vote intention.
- The only scenario in which Yes voters say they would be less likely to support independence is the scenario in which Nicola Sturgeon resigns as First Minister. 28% of Yes voters say that this would make them less likely to support independence, compared to 23% who say it would make them more likely. This is a greater share than among all Scottish voters, where it would make 26% of voters more likely and 21% less likely. The implication is that a substantial portion of the Yes vote is bound up in the First Minister's personal attributes.

Figure 16: “How much more or less likely would you be to support Scottish independence in the following circumstances?” Net much or a little more likely

Source: Hanbury, 12 Feb - 1 March, Onward analysis



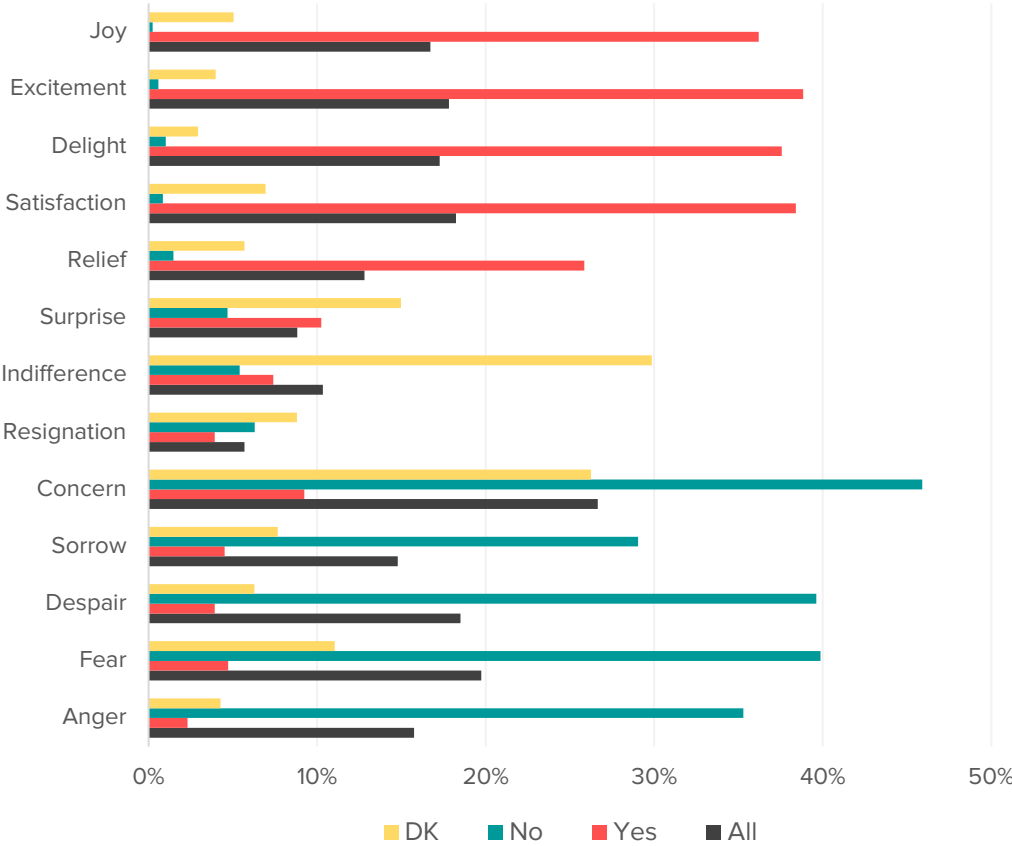
2. The effect of different scenarios on voters' feelings

The previous section suggests that different scenarios would have a substantial effect on voting behaviour. This section looks at how voters think they would *feel* in a range of scenarios, in order to understand the emotional trade-offs that voters are making when they think about choices at the ballot box. The results further illustrate that rising support for independence is far from baked in and could quickly subside. We find strong evidence that the debate is becoming highly emotionally polarised, including:

- When asked how they would feel in the event of Scotland voting for independence, the three most cited emotions are “concern” (27%), “fear” (20%) and “despair” (19%). Nearly one in two (46%) No voters and one in ten (9%) Yes voters would feel “concern”, as would one in four (26%) or Don’t Know voters. 40% of No voters would feel “fear” and “despair”.
- The next three most cited emotions are all positive emotions, driven by Yes voters. 18% of all voters (and more than one in three Yes voters) would feel “satisfaction” and “excitement”, despite only 1% of No voters citing those emotions.

Figure 17: “How would Scotland voting to become an independent country make you feel?”

Source: Hanbury, 12 Feb - 1 March, Onward analysis



- Voters' concern increases if a referendum were to be held without the permission of the UK Government. Overall, 30% of voters would feel "concern" in this scenario, including twice the share of current Yes voters (18%) who said they would be concerned by the act of Scotland voting for independence. A further 22% of voters would feel "angry", including 49% of No voters. At the same time, fewer Yes voters would feel "satisfaction" (28%) or "excitement" (27%) about a referendum that had not been agreed.
- In the scenario in which the UK Government does agree a referendum, we find that overall levels of "concern", "fear" and "despair" all fall, by 2, 3 and 7 percentage points respectively. By contrast, "relief", "satisfaction" and "resignation" would all rise by around 3 percentage points. This further reinforces the evidence above that the Scottish Government holding a unilateral referendum will backfire, hardening the No vote and creating concern among Yes voters.

3. The effect of recent weeks

The fieldwork for our first Scottish poll was conducted between 12 February and 1 March, and our second poll on the weekend of 5-7 March. In the intervening time, the First Minister, Nicola Sturgeon gave evidence to the Scottish Parliament inquiry about the handling of misconduct claims against Alex Salmond. In addition, the UK Chancellor, Rishi Sunak announced his Budget, Anas Sarwar became Scottish Labour Leader, and a number of studies confirmed that the vaccination programme was successfully reducing transmission of coronavirus. These factors may all have driven the 5-point fall in Yes lead between the two polls.

Looking more deeply at where vote intention shifted can give us some idea of which factors were most important, and where support for independence is softest to wider events and shifting circumstances. In general, and remembering that these figures come with a healthy margin of error, we find that voter groups with lower average turnout historically are more likely to be fair weather supporters of independence who have switched their vote from Yes to No in recent weeks:

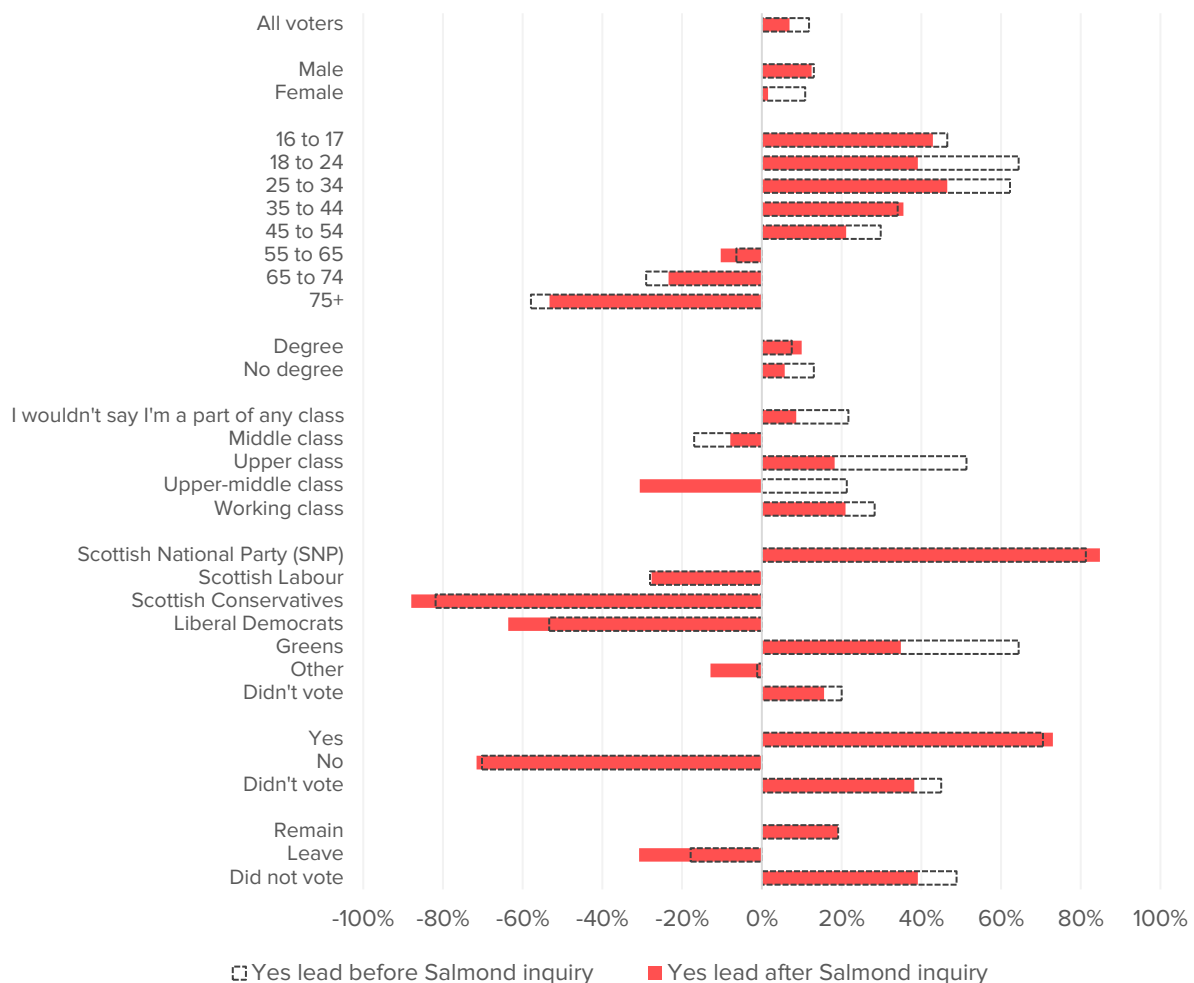
- Female voters went from supporting Yes by +11% to just two points, a fall of 9 points, or a 4.7% swing. Male voters saw support for independence hardly change at all, from a Yes lead of +13% to +12%.
- Younger voters became less strident in their support for independence, although all groups under 55 remain heavily biased towards voting Yes. The Yes lead fell by 4 points among 16-17 year-olds, 25 points among 18-24 year-olds, 16 points among 25-34 year-olds, after the Salmond Inquiry testimony.
- The same is true for the class and education groups that are most strongly pro-Yes. The Yes lead among working class voters fell 7 points to 21% while those without degrees

went from a +13% Yes lead to a 6% lead. The largest shift was among Upper-middle class voters, from +21% to -31%, although the margin of error is higher here given the small sample of these voters.

- Notably, SNP voters became marginally *more* likely to vote Yes after the Salmond Inquiry evidence, suggesting that the events of recent weeks have hardened their views. Meanwhile, Labour, Conservative, Lib Dem and most notably Scottish Green Party voters became considerably more likely to vote No. The Yes lead among Green voters almost halved, from +64% to +35%.
- There was little or no effect on the views of Yes or No 2014 voters, but the Yes vote fell considerably among those who Did Not Vote in either the 2014 referendum, the 2016 European referendum or the 2019 General Election. This suggests that SNP division and perceptions of trust matter considerably for new or low participation voters.

Figure 18: How would you vote in a future referendum if the question were ‘should Scotland be an independent country?’ before and after the recent Salmond inquiry?

Source: Hanbury, 5 March – 7 March, Onward analysis



Conclusion

More than anything, this chapter reinforces the volatility of the Scottish electorate on the issue of independence. Voters are moving between Yes and No with startling speed as a result of a rapidly changing debate. Large numbers of voters have switched their vote several times since the 2014 referendum, and may yet change sides again in the coming weeks. There is all to play for.

Support for independence is more fragile than most people acknowledge. If the SNP continues to push for a referendum this year, or without the agreement of the UK Government, it will likely undermine headline support for independence. Similarly, continuing divisions within the SNP are likely to put off the voter groups who have recently swung behind independence, including wavering female voters and DE voters.

The opposite is also true, however. If the UK Government handles the issue without care, and refuses a referendum outright, then Scottish opinion is likely to significantly harden against continued membership of the UK. Unionists should not underestimate the strength of feeling, including among No voters. The message from the UK Government should be “not now” rather than “no” if it is to survive contact with the Scottish electorate.

Imagined communities

Identity, values, pride



The historian Benedict Anderson wrote that “the fellow members of even the smallest nation will never know most of their fellow members, meet them, or even hear of them, yet in the minds of each lives the image of the communion... Communities are to be distinguished, not by their falsity or genuineness, but in the style in which they are imagined.” This “imagined community” is perhaps even more important for the United Kingdom than it is for other nations, consisting as it does of multiple, at times competing, national identities alongside and within a larger British identity.

This complex tapestry of identity has not always sat easily within the United Kingdom. The original 1707 Act of Union was as much an act of political expediency as of cultural union. In all four nations of the United Kingdom, feelings of Britishness have at times caused friction with pre-existing, local or national identities. This chapter considers the emotional and cultural aspects of the Union. How do voters feel about the Union? To what extent are issues like national identity and values driving growing support for independence? Which institutions do voters think are most trustworthy?

1. National identity

British identity has been in decline, and national identity on the rise, since well before devolution began in 1997. In 1992, around one in five (19%) Scots said they were ‘Scottish not British’, compared to 33% who said they were ‘Equally Scottish and British’. Today these figures have been inverted: 32% of Scots see themselves as exclusively Scottish, while just 26% see themselves as both Scottish and British.²³

This trend has been less prevalent in Wales and Northern Ireland, but the share of people seeing themselves as ‘Welsh not British’ or ‘Irish not British’ rose from 17% in 1997 to 21% in 2012, and from 18% in 2007 to 23% in 2018, respectively.^{24 25} In England, the share of voters saying they are ‘English not British’ has nearly doubled from 7% in 1997 to 13% in 2017.²⁶

This decline has not been caused by devolution, but it has not been lessened by it either. In a review of the evidence for the British Social Attitudes Survey, Professor John Curtice concluded: “devolution has certainly not proved to be the harbinger of any strengthening of Britishness. Rather that identity seems to have weakened somewhat in both England and Northern Ireland, while in Scotland it has remained as weak as it has ever been.”²⁷ In successive polls, too, national identity has proved to be the most powerful predictor of support for independence. In 2014, 89% of voters who said they were ‘Scottish not British’ voted Yes, as did 60% of those who said they were ‘More Scottish than British’. Meanwhile, 90% of those who said they were ‘British not Scottish’ voted No.

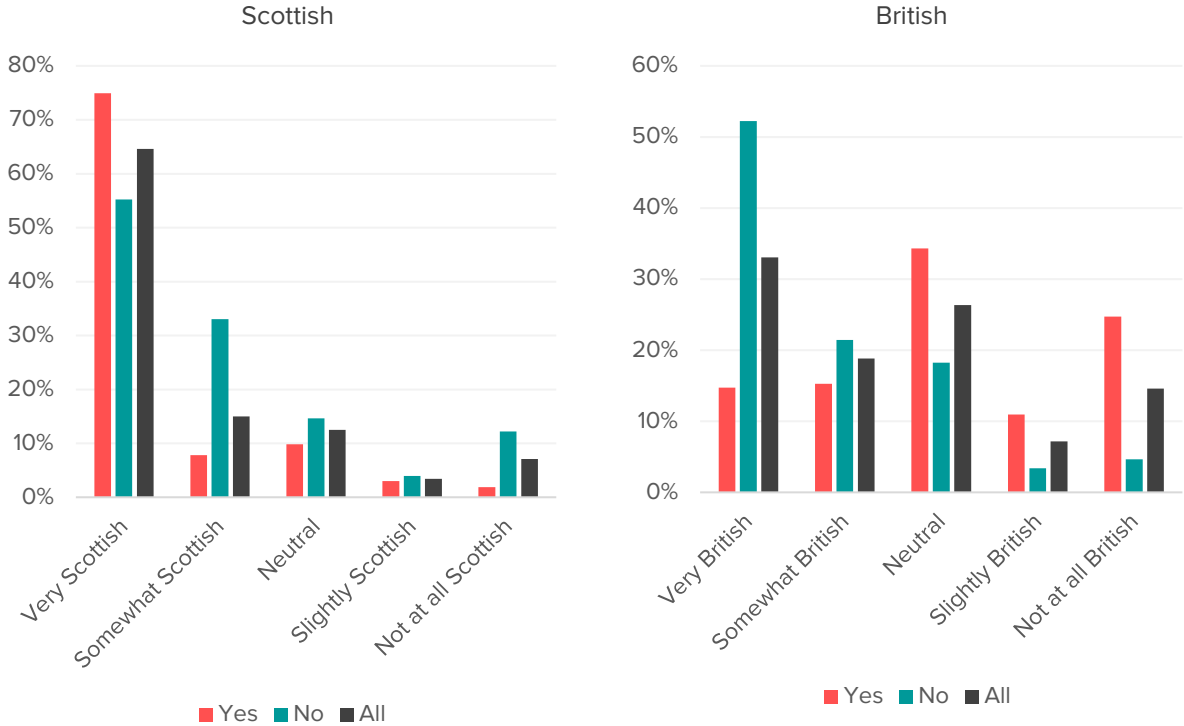
Our findings suggest that this effect appears to be hardening. As explored earlier, future referendum vote intention is largely a function of national identity. On a 0-10 scale, 75% of Yes voters say they feel strongly Scottish (a score of 9 or 10), compared to 55% of No voters. This is a significant difference, but the Britishness gap is even larger. Just 15% of Yes voters feel strongly British, compared to 52% of No voters.

Overall, 52% of Scottish voters say they are very (33%) or somewhat (19%) British. This compares to 80% of Scots who say they are very (65%) or somewhat (15%) Scottish. In contrast, only 10% of Scottish voters say they are not at all (7%) or slightly (3%) Scottish, compared to 22% who say they are not at all (15%) or slightly (7%) British.

In Figure 19 below we look at these self-reported identities to see how they interact. As you can see, No voters are far more likely to feel more British than Scottish, but are also more likely to feel *both* Scottish *and* British. Yes voters are much more likely to perceive themselves as exclusively Scottish. 28% of No voters feel more Scottish to some extent (-2 to -10). But only 6% of Yes voters feel more British (2 to 10). This asymmetry tells us that, for Yes voters, Britishness and Scottishness are mutually exclusive, whereas No voters are more comfortable holding both identities (to varying extents) simultaneously.

Figure 19: Share of voters who define as Scottish (LHS) and British (RHS), by referendum vote intention

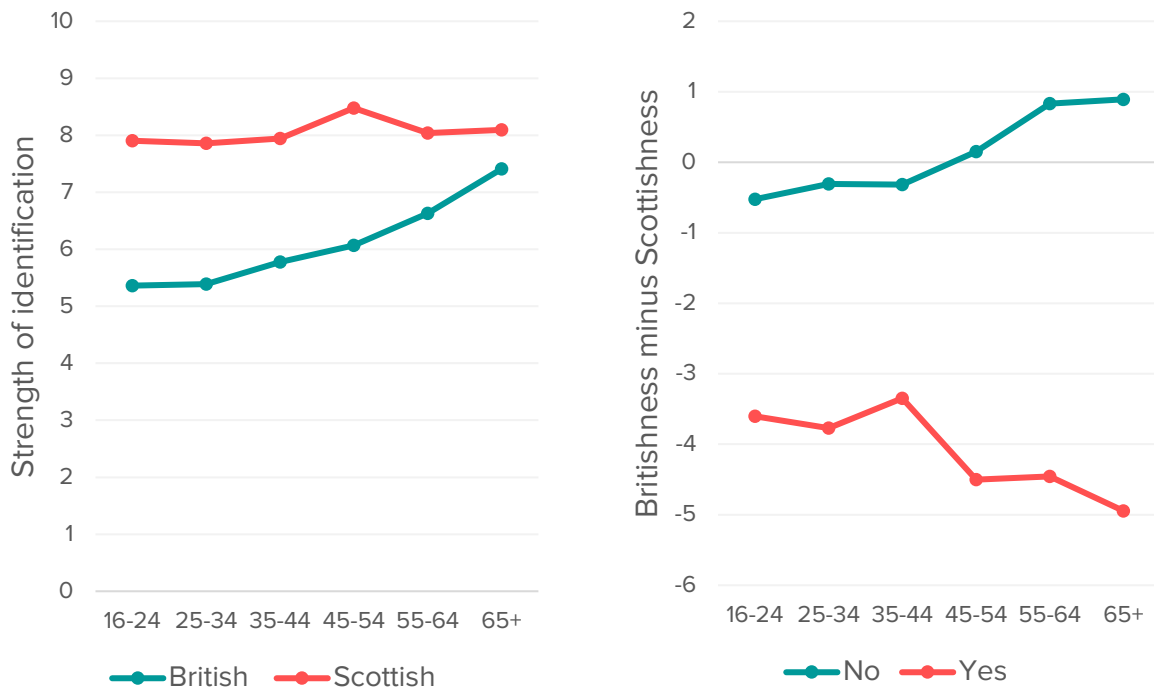
Source: Hanbury, 12 Feb - 1 March, Onward analysis



- Scottish identity is consistently strong across all age groups. Older people feel just as Scottish, on average, as younger people. Not so for Britishness. Identification with Britain is relatively low among 16-24 year-olds. But among those aged over 65, this rises almost to the same level as Scottishness.
- A more complicated picture emerges when we break this down by vote intention. Older voters are more polarised on identity issues than younger voters. As No voters age, they tend to feel more British relative to Scottish. But as Yes voters age, they identify more even with Scotland relative to Britain.
- Yes voters feel significantly more European than No voters, but neither group identifies particularly strongly with Europe. 23% of Yes voters feel very European (a score of 9-10) but 27% feel not at all European (a score of 0-1). The figures for No voters are 9% and 47%, respectively. This data elaborates on the headline vote intention we explored in Chapter 3. While Brexit is not a dividing line at a population level, it appears to have hardened attitudes within the Yes and No coalitions.

Figure 20: Age and national identity

Source: Hanbury, 12 Feb - 1 March, Onward analysis

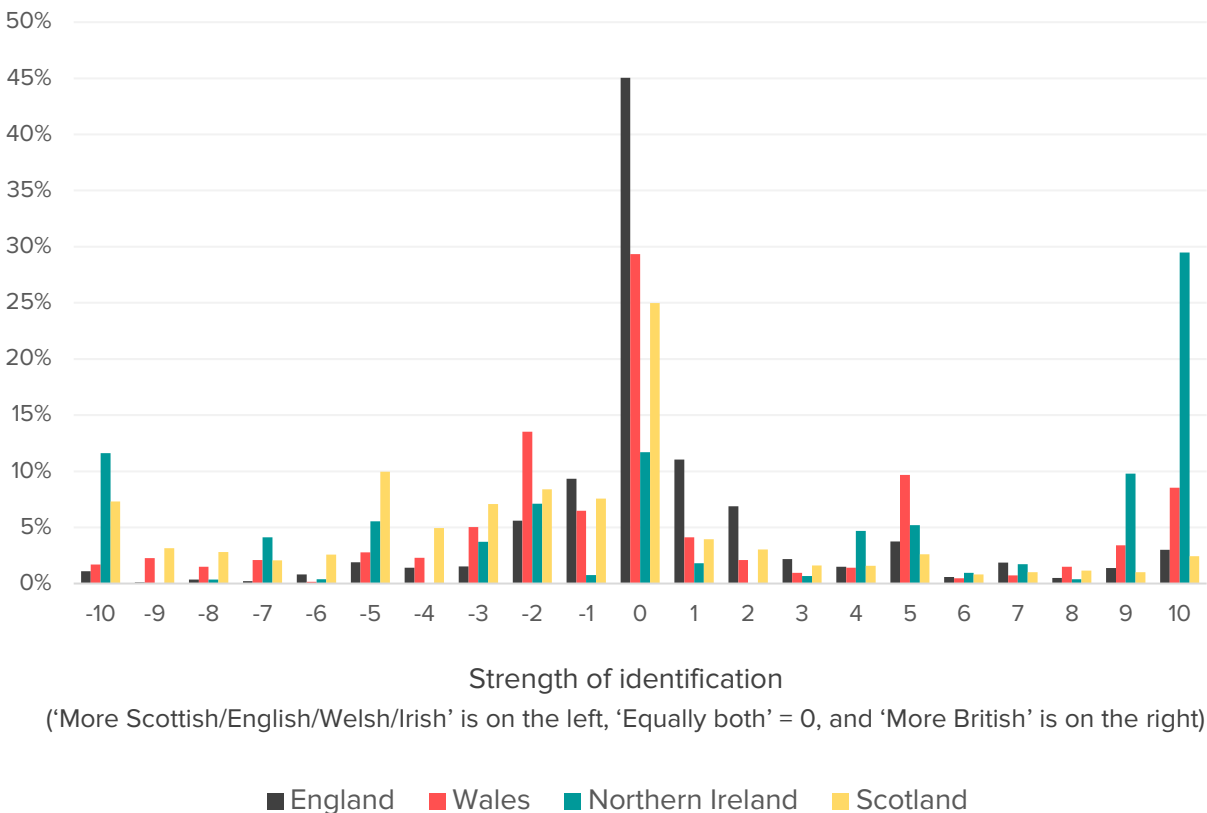


In the other three nations, does being English, Welsh or Irish conflict with or complement Britishness?

- In England, there is little difference between the degree to which people feel English and British. 78% of people feel as English as they feel British. Only 2% feel very English but not British and 7% feel British but not English.
- In Wales too there is a strong sense that Welsh and British identities can coexist, although this is less common than in England. 56% feel both Welsh and British, compared to just 8% who report being entirely Welsh and 14% who feel entirely British.
- It is quite a different story in Northern Ireland. A mere 21% see themselves as similarly British and Irish. 16% feel Irish but not British. But the most common response is to be very British but not Irish (41%). In Northern Ireland, British and Irish identities are more likely to be seen as mutually exclusive than in other parts of the UK.

Figure 21: Strength of national identity

Source: Hanbury, 12 Feb - 1 March, Onward analysis



2. What values should nations embody?

We also asked respondents to tell us which values their country should embody in order to illustrate the cultural differences between different nations of the United Kingdom. We find that:

- As whole, Scottish voters see Scotland as fundamentally progressive, and see these values as at odds with the rest of the UK. Yes voters overwhelmingly prioritise a 'Welcoming' Scotland, whereas No voters are far more likely to prefer values of 'Protective' and 'Proud'. But there is some overlap. Both groups want Scotland to be 'Fair', and to a slightly lesser extent 'Equal'. When asked to rank the top three values that Scotland should embody, neither Yes nor No voters were particularly focused on values such as 'ambitious', 'modern', 'respected' or 'pragmatic'.
- In general, those who said they 'don't know' or 'would not vote' tend to have views more similar to Yes voters on which values Scotland should embody. Whereas No voters emphasise 'protective', 'proud' and 'free', undecided voters place relatively less value on these. Compared to both Yes and No voters, undecided voters are more likely to think that Scotland should exhibit values such as 'fair', 'equal' and 'strong'. They are far less likely than Yes voters to value 'welcoming'.
- Without fail, Yes voters think that Scotland would be more capable of exhibiting their preferred values outside the UK, and No voters think the opposite. But both groups also think that their deprioritised values would improve under their preferred referendum outcome. That is to say, there is no relationship between the values people want Scotland to exhibit and whether independence would make those characteristics more achievable.
- For example, 3% of Yes voters ranked 'safe' in their top 3, but 87% think Scotland would be safer outside the UK. Despite not prioritising safety, 49% are *very confident* that it would improve outside the UK (a score of 6 out of 6). The same attitudes hold for No voters, who say that Scotland would be more able to exhibit each of the listed values if it remained part of the UK, regardless of whether a given issue is a priority for them.
- Yes voters think that leaving the UK would make Scotland more capable of being 'Independent' and 'Proud'. No voters think that remaining in the UK would make Scotland more capable of being 'united', 'safe', and 'wealthy'. Although No voters think that Scotland would be more 'independent' inside the UK, this is the issue they are least confident about (average score 2.8).

- Undecided voters think that, on average, independence would improve the likelihood of exhibiting all of the listed characteristics except ‘conservative’, which they think is slightly more likely if Scotland is part of the UK. They are more likely to think that Scotland could become more independent, proud and free if it were an independent country. For these voters, Scotland is marginally more likely to be safe, united and wealthy if it were an independent country, but many respondents cluster around the middle. As with the values that Scotland should embody, the views of undecided voters correlate more strongly with Yes voters than with No voters.
- Looking past the highly partisan responses, it seems that people associate Scotland leaving the UK with greater independence and pride and associate remaining in the UK with safety, unity and wealth.

Figure 22: Which values do you most want Scotland to exhibit? By vote intention (Yes/No) and weighted by rank order

Source: Hanbury, 12 Feb - 1 March, Onward analysis

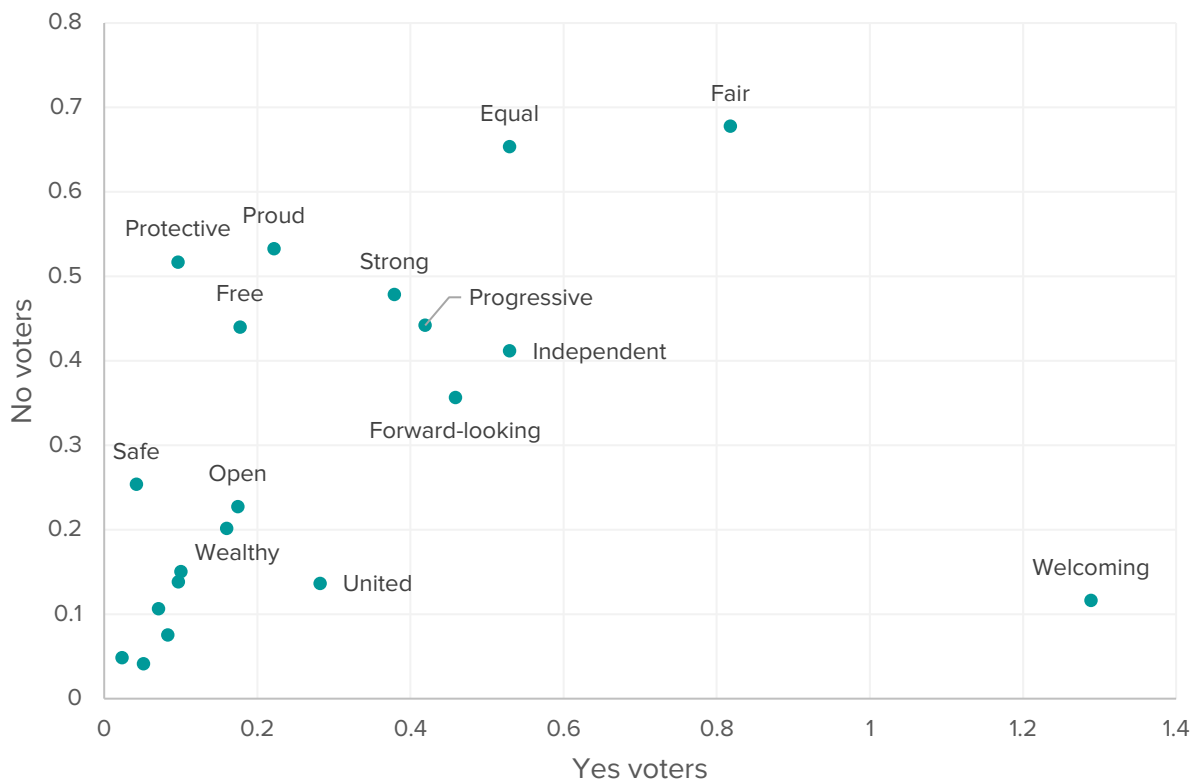
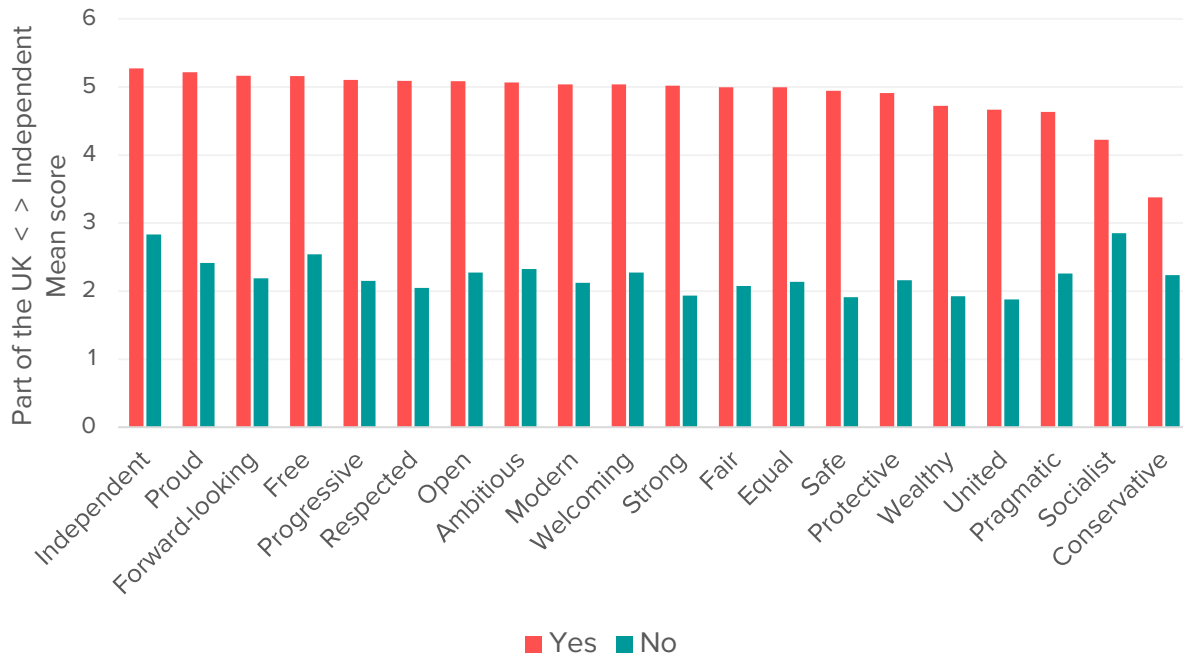


Figure 23: Do you think Scotland is more capable of being each of the values below as part of the UK, or as an independent country? Net support for as an independent country

Source: Hanbury, 12 Feb - 1 March, Onward analysis



- Whereas Scots overall are more likely to prefer values like ‘fair’, ‘welcoming’ and ‘independent’, preferences in Wales and Northern Ireland differ significantly. Overwhelmingly, and perhaps unsurprisingly, ‘safe’ is the value that people in Northern Ireland most want their country to exhibit. This is followed by ‘forward-looking’ and ‘fair’. In Wales, no single value stands out as particularly popular. The two that rank the highest are ‘united’ and ‘proud’. Despite ‘independent’ and ‘welcoming’ being Scottish voters’ second and third most popular values, respectively, they rank 11th and 8th in Northern Ireland and 15th and 9th in Wales.
- One thing that clearly unites voters across Scotland, Wales and Northern Ireland is the identification of the UK with conservatism. In each of these nations, a majority of people think that their country being ‘conservative’ is more likely if part of the UK. It is impossible to know the extent to which 11 years of Conservative government have altered this perception or whether this finding would have still held at the turn of the Century, during New Labour’s time in Government. But, going forward, remaining a part of the UK is linked to conservatism in the minds of many voters.
- Across the board, people in Northern Ireland are more likely to think that each of the listed values would be marginally better in the UK rather than as part of a United Ireland. Aside from ‘conservative’, people identify values of ‘wealthy’ and ‘safe’ most with the UK. 60% think that Northern Ireland would be wealthier in the UK, compared to 14% who think

they would be wealthier in a United Ireland. The same goes for safety; by 55% to 15%, people think Northern Ireland would be safer in the UK. The values least identified with the UK are ‘independent’, ‘open’ and ‘welcoming’.

- Opinion in Wales is slightly more mixed. Most people think that Wales is more capable of exhibiting values such as ‘wealthy’, ‘united’, ‘safe’ and ‘strong’ as a constituent part of the UK - a clear focus on security and stability, as we see in Northern Ireland - but voters are less certain about the benefits of union than they are on the other side of the Irish Sea. 49% of Welsh voters think they would be ‘wealthier’ inside the UK, compared to 20% who think it would improve with independence. On safety, voters are split 47% to 28%.
- How does this compare to England? As we see in Wales, English opinion is less concentrated around a few very popular values. In England, ‘safe’ ranks at the top - a priority they share with Northern Ireland. Fairness is highly valued across the UK and England is no exception; ‘fair’ ranks second on this list for English voters, although they are less enthusiastic about it than Scottish voters.
- In England, voters are the most likely of any of the four nations to value being ‘respected’ but they place less emphasis on ‘progressive’ and ‘forward-looking’. On the question of whether independence or union would make each of the listed values easier to achieve, English voters are generally the most pro-union. They are the most likely to think that the country would be a more ‘welcoming’ and ‘united’ place inside the UK. But they are less likely than people in Wales and Northern Ireland to think they would be wealthier if remaining in the Union.

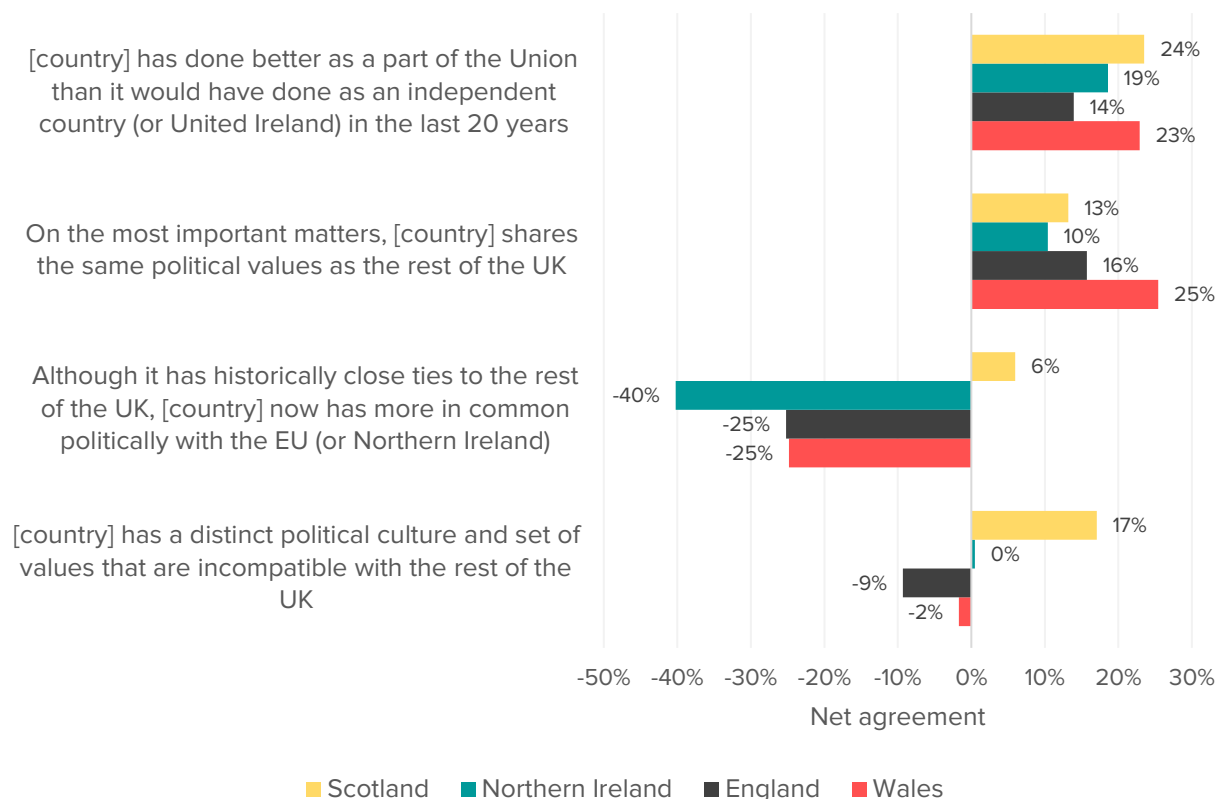
Looking at how people see their culture in relation to the wider United Kingdom, we can see that Scotland is in some ways different from other parts of the UK. We find that:

- 43% of Scots agree with the statement “Scotland has a distinct political culture and set of values that are incompatible with the rest of the UK”, compared to 26% of English voters, 33% of Welsh voters and 41% of Northern Irish voters who agree with similar statements about their countries. This compares to 26% who disagree in Scotland, 35% in Wales, 24% in England and 40% in Northern Ireland, meaning that Scotland is considerably more likely to agree in net terms than people in other parts of the UK.
- Scotland is the only country where voters think of themselves as more in common with the EU than the rest of the UK. 36% of Scots agree with this statement, considerably more than the 23% in Wales, 18% in England and 21% in Northern Ireland. Three fifths of Northern Irish voters (61%) disagreed with this statement, suggesting that British values are strongly held in Northern Ireland.

- However, despite these differences, there is strong agreement among all nations of the UK that “on most important matters, Scotland/Wales/England/Northern Ireland shares the same political values as the rest of the UK”. 37% of Scottish and English voters, 46% of Welsh and 42% of Northern Irish voters agree with this statement. This is particularly notable in the wake of Brexit.
- Interestingly, there is strong support for the idea that devolved nations “have done better as part of the Union than [they] would have done as an independent country over recent decades.” 46% of Scots, 43% of Welsh voters and 47% of Northern Irish voters agree, compared to 23%, 20% and 28% who disagree respectively. The outlier on this question is England: only 37% of English voters agree that it has benefited from the Union in the last twenty years, against 24% who disagree. This suggests, fundamentally, that support for independence may be a temporary response to events or shifting identity, rather than a deep-seated desire for permanent separation.

Figure 24: Net agreement with statements about the value of the Union in all four nations of the UK

Source: Hanbury, 12 Feb - 1 March, Onward analysis

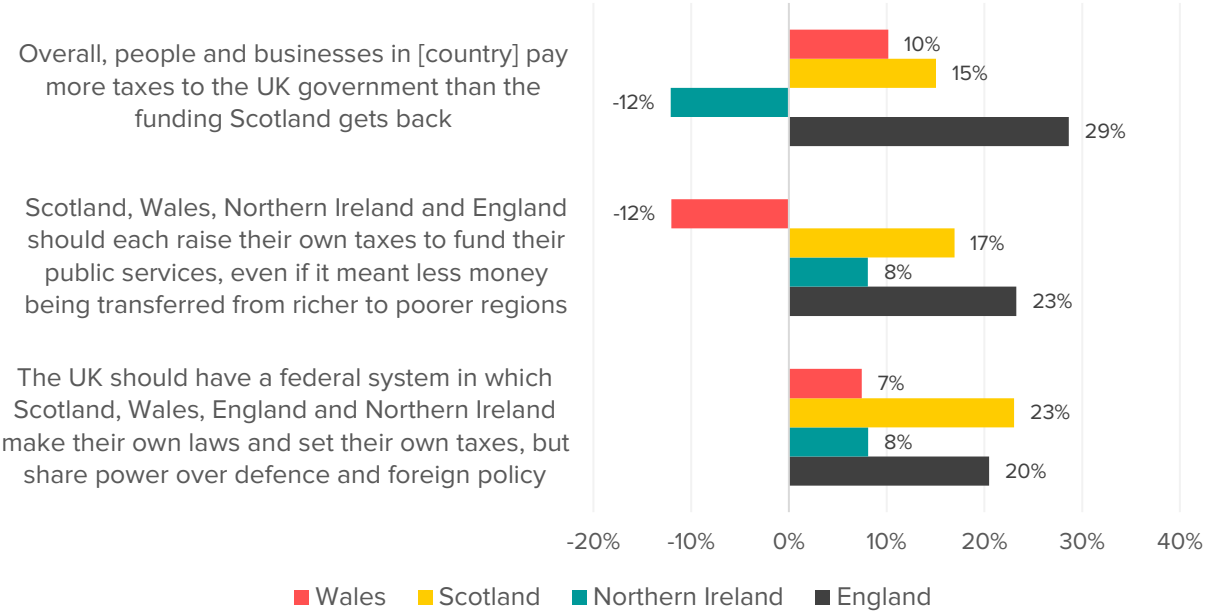


We also find further evidence that, although they are the most supportive of the Union on emotional and identity grounds, English voters are more sceptical about the fiscal fairness of the current arrangements. In England, voters are by far the most likely to think that they pay more in taxes to the UK Government than they get back in spending. This opinion is also shared by those in Scotland and Wales (net agreement with the statement is 15% and 10%, respectively), but to a lesser extent.

Only in Northern Ireland do more voters think the Union is a net fiscal benefit rather than a drain on their resources. In a similar vein, public opinion in England is more in favour of each country raising their own taxes to fund public services, even if less money is transferred from richer to poorer areas. However, when this is phrased as a federal system with each nation making its own laws, support for the statement among Scots slightly overtakes that among English voters.

Figure 25: Net agreement with statements regarding the future of the Union in each nation of the United Kingdom

Source: Hanbury, 12 Feb - 1 March, Onward analysis



In addition, to values and national identity, we tested levels of pride in different aspects of British culture. In Scotland, levels of pride are very similar across the whole range of features that we polled, but three differences stand out between Yes and No voters. We find that:

- Although both Yes and No voters are on the whole proud of Scotland’s multiculturalism and diversity, Yes voters are significantly more proud of this feature of Scotland than No voters. Conversely, No voters are more proud of the monarchy and armed forces than Yes voters. In fact, the monarchy is the only feature that Yes voters are marginally unproud of.

- In terms of issue ownership, Yes voters see the Monarchy as very British and the armed forces as slightly more British than Scottish. But every other aspect of Scotland is perceived to be more Scottish to varying extents, especially ‘our sense of humour’, ‘our history’ and ‘our universities’.
- No voters tend to agree with Yes on which features are more Scottish or more British than others in relative terms, but they are more likely to identify features as more British or equally both.
- ‘Yes’ voters are far more likely to be proud of things they identify with Scotland rather than Britain. But this is not true for No voters. This is not to say that No voters are more proud of features they identify as British, but rather their sense of pride is not clearly tied to either the Britishness or Scottishness of a given feature. Figure 26 and Table 1, below, illustrate this.

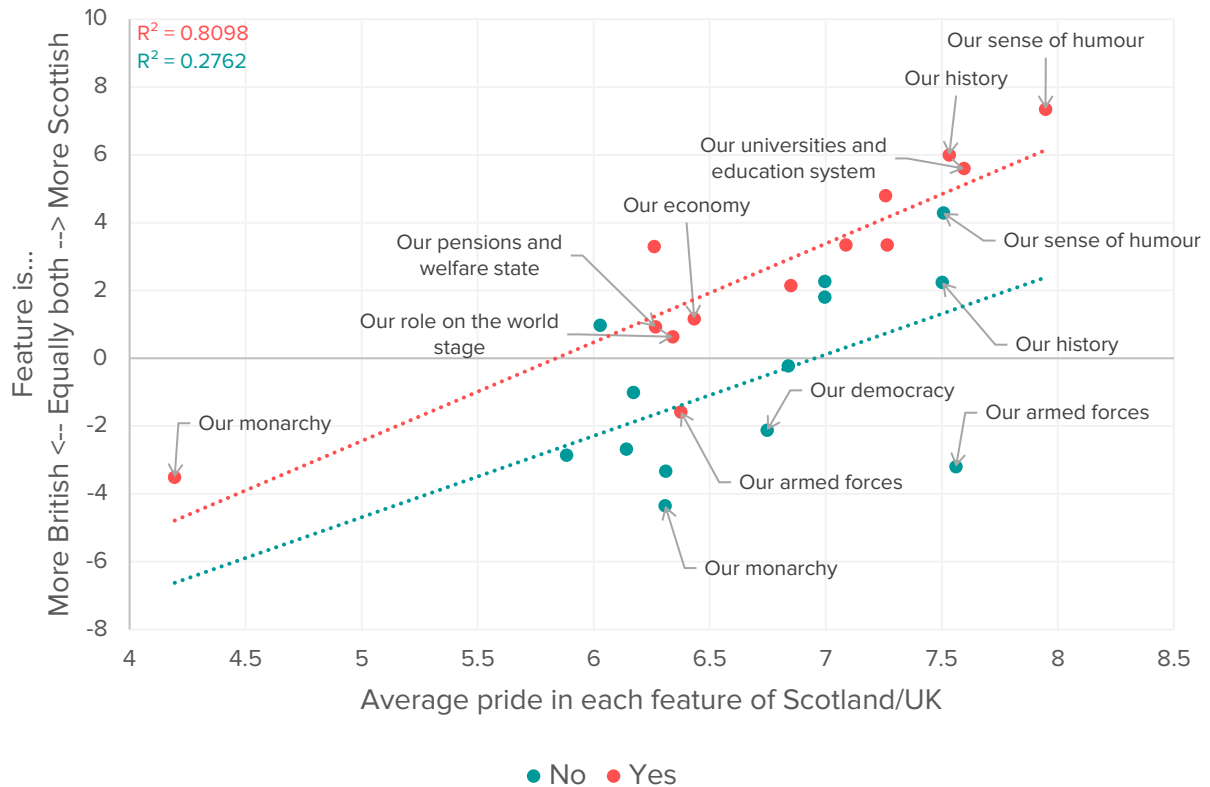
Table 1: Thinking about the features below, would you say that each is... Mostly Scottish, Equally Scottish and British, or Mostly British?

Source: Hanbury, 12 Feb - 1 March, Onward analysis

Average pride in each feature (0-10 scale)	Feature ownership (10 = Mostly Scottish, -10 = Mostly British)	
	No	Yes
Our sense of humour	7.51	7.95
Our universities	7.00	7.60
Our history	7.50	7.53
Our arts, literature, film and music	6.84	7.26
Our food and drink	7.00	7.26
Our multiculturalism and diversity	6.17	7.09
Our democracy	6.75	6.85
Our economy	5.88	6.43
Our armed forces	7.56	6.38
Our role on the world stage	6.31	6.34
Our pensions and welfare state	6.14	6.27
Our sports teams	6.03	6.26
Our monarchy	6.31	4.19

Figure 26: Pride vs ownership of different features of the UK/Scotland

Source: Hanbury, 12 Feb - 1 March, Onward analysis



3. What would people miss about the UK if their country became independent?

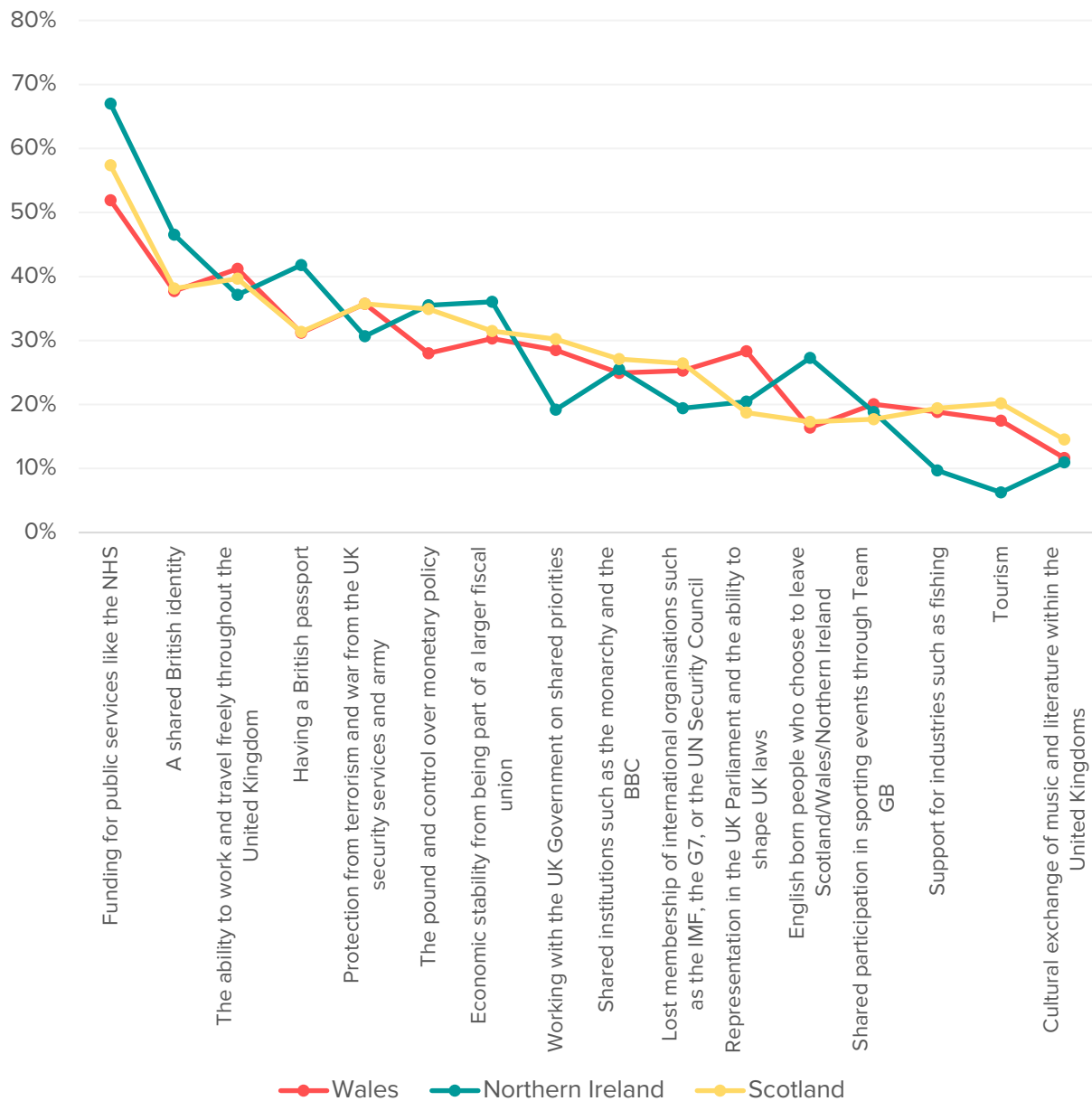
These findings are reinforced when we asked what people would miss if their country became independent, where we find that:

- The only benefit or feature of the United Kingdom that a majority of voters in Scotland, Wales and Northern Ireland would miss in the event of reunification is funding for public services like the NHS. This further underscores the salience of the NHS and the association with subsidy through the Barnett Formula to devolved nations.
- More broadly, economic benefits tend to dominate more than cultural institutions in the minds of voters. The ability to work and travel freely throughout the United Kingdom, as well as the pound and economic stability, were cited by around 3-in-10 to 4-in-10 voters in each of Scotland, Wales and Northern Ireland. In contrast, only around 11%-15% of voters would miss the cultural exchange of music and literature and 19% say they would miss shared participation in sporting events through Team GB. Protection from terrorism and war ranked fourth for both Welsh and Scottish voters, but seventh for those in Northern Ireland.

- In Wales and Scotland, 38% of voters say they would miss a shared British identity; this rises to 47% in Northern Ireland. There is a similarly strong attachment to holding a British passport. It seems therefore that there is a significant level of identification with a common sense of Britishness, even if headline support for independence is rising.

Figure 27: If [country] became independent in the next ten years, what benefits or features of the Union would you most miss?

Source: Hanbury, 12 Feb - 1 March, Onward analysis

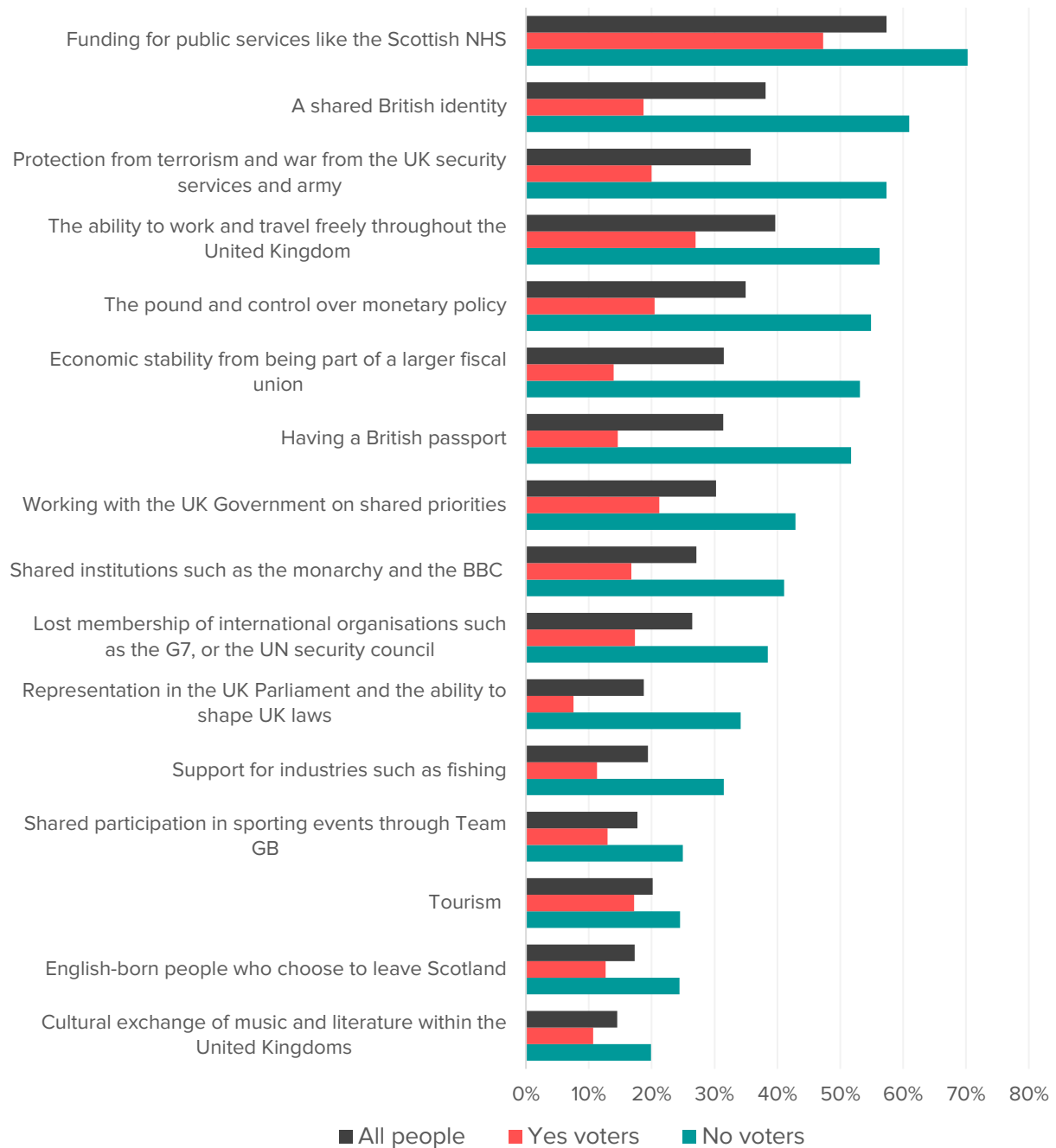


Unsurprisingly, when we break this down by future referendum vote intention in Scotland, we can observe quite large differences between voters on each side of the debate. The data shows three things clearly: first, that, in the minds of voters, the benefits of union centre around stability and security; secondly, identity strongly influences vote intention; third, that voters do not expect independence to be pain free, so a "project fear" approach will not work.

- With the exception of the 47% of Yes voters who would miss funding for the NHS, Yes voters say they would not miss much about Britain. Around a quarter (27%) of Yes voters say they would miss the ability to work and travel freely throughout the United Kingdom. Yes voters would least miss the ability to shape UK laws (8%) and cultural exchange of music and literature (11%).
- No voters are far more likely to say they would miss funding for the NHS (70%). With the exception of a shared British identity, all of the features that a majority of No voters would miss are related to the economy and themes of security: the pound (55%), stability of a fiscal union (53%), free movement for work and travel (56%), protection from terrorism and war (57%). No voters have a similar lack of interest in the cultural aspects of the Union as Yes voters, although the sense of loss would be slightly greater (around 20%-25% would miss these features of the UK). Neither Yes nor No voters would particularly miss English-born people who choose to leave Scotland (13% and 24%, respectively).
- The gap between the loss of a sense of Britishness and the loss of English-born people who may leave Scotland is striking, particularly among No voters. 64% of No voters say they would miss a shared British identity, but only 24% would miss any of the English-born people who may migrate elsewhere. This implies that the perception that Britishness is something separate from Englishness is important, especially amongst Scottish Unionists. But the distinction is perhaps not so clearly drawn among Yes voters, which may partly explain why the gap between missing a sense of Britishness and missing English-born people is only six percentage points.

Figure 28: “If Scotland became independent in the next ten years, what benefits or features of the Union would you most miss?” by future referendum vote intention

Hanbury, 12 Feb - 1 March, Onward analysis



4. Warmth towards different institutions and organisations

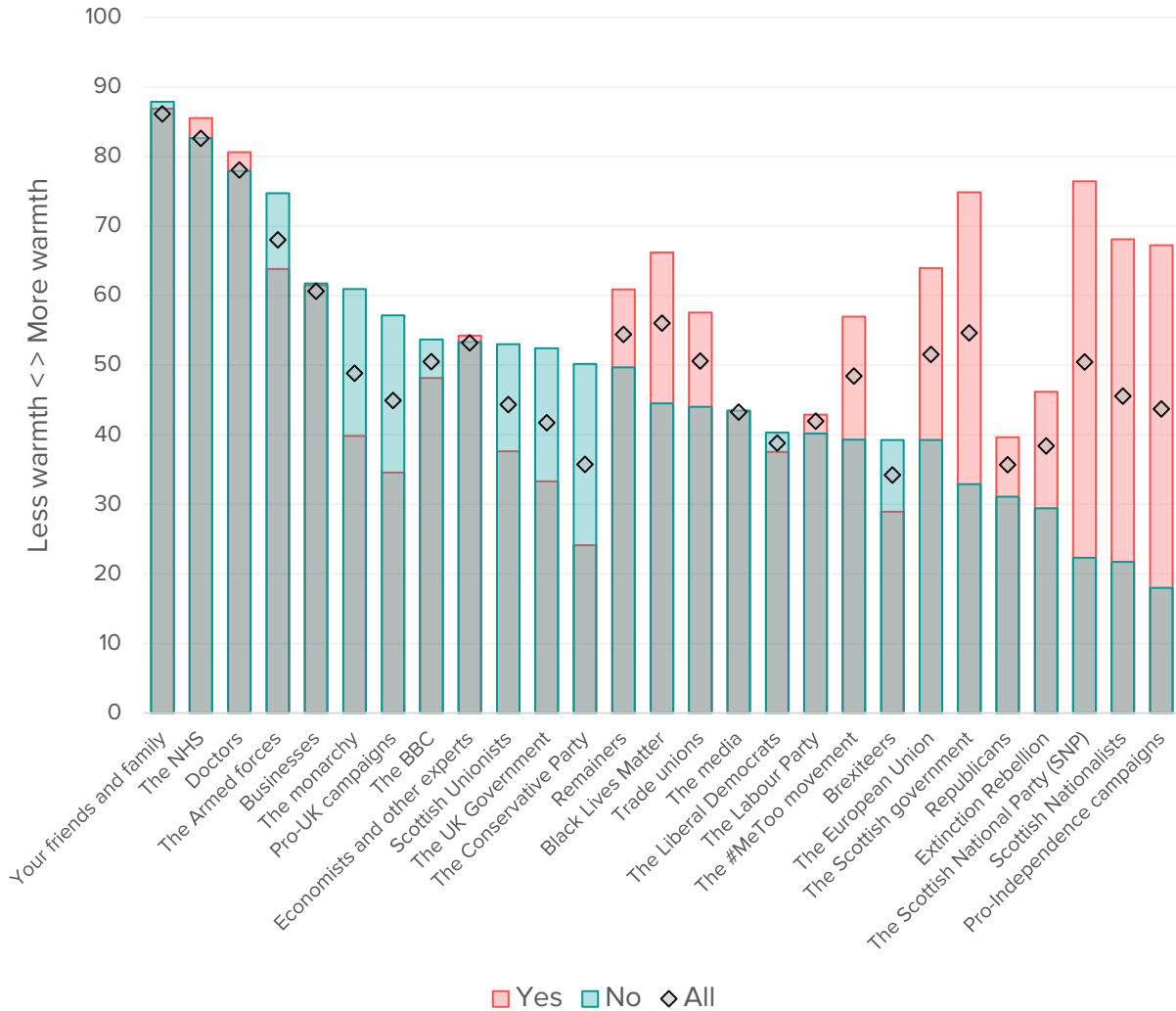
The distance between Yes and No voters extends to how different voters feel about certain institutions or organisations who may become involved in any future referendum debate. We find that:

- Scottish voters are unsurprisingly highly polarised about different referendum campaigns and political parties. Yes voters dislike the Conservative Party (mean score of 24 out of 100) to almost exactly the same extent as No voters dislike the Scottish National Party (22). But Yes voters like the SNP (76) far more than No voters like the Conservative Party (50). This suggests either a problem with the Conservative brand among No voters or is indicative of the splintered Unionist coalition spread, as it is, across three parties (Conservative, Labour and Liberal Democrat) from different political traditions.
- The UK Government and Scottish Government also divide opinion considerably. No voters dislike the Scottish Government as much as Yes voters dislike the UK Government. But, asymmetrically, Yes voters approve of the Scottish Government (75) more than No voters approve of the UK Government (52). This again suggests that the Scottish Government is more of an asset in a future debate over the Union than the UK Government. The gap between Yes and No voters in terms of warmth towards the armed forces is also significant (64 against 75). But both groups view the military favourably.
- The monarchy is as popular with No voters as it is unpopular with Yes voters (61 to 40), but still retains a healthy level of support among Yes voters. We see a similar, but reversed, pattern with attitudes towards the European Union (Yes voters: 64, No voters: 40). Indeed, when we look at differing opinions of Leavers and Remainers, the gap between Yes and No voters is even smaller. Yes voters report an average score of 61 for warmth towards Remainers, compared to a score of 50 among No voters. Yes voters score an average 29 favourability towards Leave voters, compared to 40 for No voters. This reinforces our earlier finding that Brexit is not a key dividing line around independence.
- Both Yes and No voters report the greatest warmth towards friends and family. This is closely followed by the NHS and doctors, with support ranging between 80 to 86 points. The NHS and healthcare workers are held in very high regard by voters across the country. Businesses are moderately popular across the board (62 among both). Yes and No voters are also united in their warmth towards the media (53) and economists and other experts (54). The BBC is not particularly polarising as an institution. Yes voters marginally disapprove of the BBC (48), while No voters marginally approve (54). But the gap between them is relatively small.

- Undecided voters have the most positive views of friends and family (80), the NHS (75), doctors (71), and the armed forces (63). Businesses and the Scottish Government are equally popular, at 55. Undecided voters report the least warmth towards the Conservative Party (31), Brexiteers (36), UK Government (38), and Liberal Democrats (38).

Figure 29: Warmth towards institutions, by Yes/No

Source: Hanbury, 12 Feb - 1 March, Onward analysis



Conclusion

Scottish identity is increasingly becoming oppositional to British identity, driving a wedge through the Union in Scotland. This is not the case in other parts of the United Kingdom, where British and national identities coexist without contest, although Welsh opinion appears to be shifting in the same direction as that of Scotland which should worry Unionists.

This appears related to a steep divergence between the liberal values and welcoming political culture that Scots want their nation to embody, and those that they see as intrinsic to the UK, which they see as essentially conservative and stable, values which are not seen as anathema in other devolved nations.

The question for policymakers in the coming years will be how to reconcile these two opposing conceptions, so that citizens of devolved nations see their values as aligned to those of the wider United Kingdom. Given the importance of national identity to vote intention, it is the most important question Unionists have to answer.

Outcomes

Better together or better apart?



Since 1997, the process of devolution has been accompanied by constant debate about the level at which decisions are taken or public services are run. While successive Parliaments have increased the powers available to devolved administrations over time, albeit at different speeds, there are growing concerns that devolved administrations have either not fully used the powers available to them, or that public service outcomes have declined under local control, most notably in the case of the NHS in Wales and schools in Scotland. Some have repeatedly claimed that this is because devolved governments are overly focused on independence tomorrow at the expense of outcomes today.

Irrespective of whether this is true, what do voters believe? This chapter examines the extent to which voters understand which powers are held at the UK or devolved level, whether they believe services are getting better or worse, and which government is better placed to take decisions about different issues. We also examine the personal leadership of different politicians and explore voters' feelings about the relative performance of the UK and devolved governments about the coronavirus pandemic.

1. Issue salience

Looking at the most important issues facing each country, we can see that there are important differences between voters in the different parts of the United Kingdom. For example, we find that:

- The top three issues are the same in every nation of the UK - Health and Social Care, Jobs and Employment, and Managing the Covid Crisis. However, these issues differ in both rank priority and in levels of salience in different nations. For example, Health and Social care is substantially more of a priority in Scotland (60%) than in England (45%). Meanwhile, Jobs and economic growth are considerably more of a priority in Northern Ireland (59%) and Scotland (57%) than in Wales (45%) and England (44%).
- Scottish voters are considerably more likely to make education one of their priorities. 45% of Scots said education was a priority, nearly double the rate seen in Northern Ireland (24%), Wales (27%) and England (28%). It is the 4th top issue for Scots, compared to the 8th for English voters, 9th for Welsh voters and 11th for Northern Irish voters.
- Reform of the constitution is much more of a priority for Scottish voters than for others in the UK, although it is still not a clear priority for Scots. In rank order, the issue is the 12th most important issue in Scotland, 14th in Northern Ireland, 17th in Wales, and 20th out of 20 in England. Just 17% of Scots cited this as a priority, although this was more than double the number in Wales (8%) or England (7%).
- Sourcing vaccine supplies is much more of a rank priority in Scotland (8th), Wales (4th) and Northern Ireland (6th) than in England (10th), although similar proportions of voters in Scotland (24%) and England (25%) put it as a priority.

- Within Scotland, there is not a huge difference between the priorities of Yes and No voters. Both groups view Health and Social Care, Jobs and Employment and Managing the Covid crisis as the key priorities, by a wide margin. In terms of wider priorities, poverty and social inequality is a higher priority for Yes voters (48%) than No voters (34%) whereas the economy and taxes are more of a priority for No voters (40%) compared to Yes voters (30%).
- Even among Yes voters, Reform of the UK Constitution was seen as only the 10th most important issue facing Scotland, chosen by just one in four (24%) of Yes voters. Only 1 in 10 No voters chose constitutional reform as one their top five priorities, and the issue was 16th out of 20th in the issues we tested. Among Yes voters, sourcing vaccine supplies (26%) was seen as more important than constitutional reform and poverty was seen as twice as important.

Table 2: What do you think are the most important priorities for [country] right now? By country

Source: Hanbury, 12 Feb - 1 March, Onward analysis

	Wales	Rank	England	Rank	N Ireland	Rank	Scotland	Rank
Health and Social Care	51%	2	45%	2	52%	2	60%	1
Jobs and Employment	45%	3	44%	3	59%	1	57%	2
Managing the Covid crisis	53%	1	57%	1	44%	3	54%	3
Education	27%	9	28%	8	24%	11	45%	4
Poverty and social inequality	34%	5	28%	7	31%	7	42%	5
The cost of living	34%	6	31%	6	23%	12	38%	6
The economy and taxes	32%	7	39%	4	33%	5	34%	7
Sourcing vaccine supplies	37%	4	25%	10	32%	6	24%	8
Pensions and benefits	23%	12	20%	12	35%	4	22%	9
Housing affordability and availability	26%	11	25%	9	21%	13	19%	10
Climate change	26%	10	32%	5	25%	10	19%	11
Reform of the UK constitution	8%	17	7%	20	13%	14	17%	12
Regenerating run down town centres	31%	8	14%	14	26%	9	15%	13
Crime	17%	13	24%	11	27%	8	15%	14
Agriculture, fisheries, and rural affairs	10%	15	10%	15	13%	15	10%	15
Immigration	9%	16	19%	13	9%	17	10%	16
Improving transport, mobile and internet access	15%	14	10%	16	7%	19	7%	17
Childcare	8%	18	8%	18	3%	20	5%	18
Gender inequality and trans rights	5%	19	10%	17	9%	16	4%	19
Foreign affairs and defence	1%	20	8%	19	9%	18	3%	20

Table 3: What do you think are the most important priorities for [country] right now? By Yes/No vote

Source: Hanbury, 12 Feb - 1 March, Onward analysis

	Yes	Rank	No	Rank	DK WNV	Rank
Health and Social Care	59%	1	60%	1	65%	1
Jobs and Employment	56%	2	57%	3	62%	2
Managing the Covid crisis	52%	3	59%	2	48%	4
Poverty and social inequality	48%	4	34%	6	44%	6
Education	42%	5	46%	4	50%	3
The cost of living	42%	6	32%	7	44%	5
The economy and taxes	30%	7	40%	5	33%	7
Sourcing vaccine supplies	26%	8	22%	8	22%	8
Pensions and benefits	24%	9	19%	11	21%	9
Reform of the UK constitution	24%	10	10%	16	18%	12
Housing affordability and availability	20%	11	19%	12	18%	10
Climate change	19%	12	19%	13	18%	11
Regenerating run down town centres	11%	13	21%	9	13%	14
Crime	11%	14	19%	10	14%	13
Agriculture, fisheries, and rural affairs	8%	15	13%	14	7%	16
Immigration	8%	16	13%	15	9%	15
Improving transport, mobile and internet access	7%	17	8%	17	5%	17
Childcare	6%	18	3%	19	5%	18
Gender inequality and trans rights	6%	19	2%	20	3%	19
Foreign affairs and defence	3%	20	3%	18	2%	20

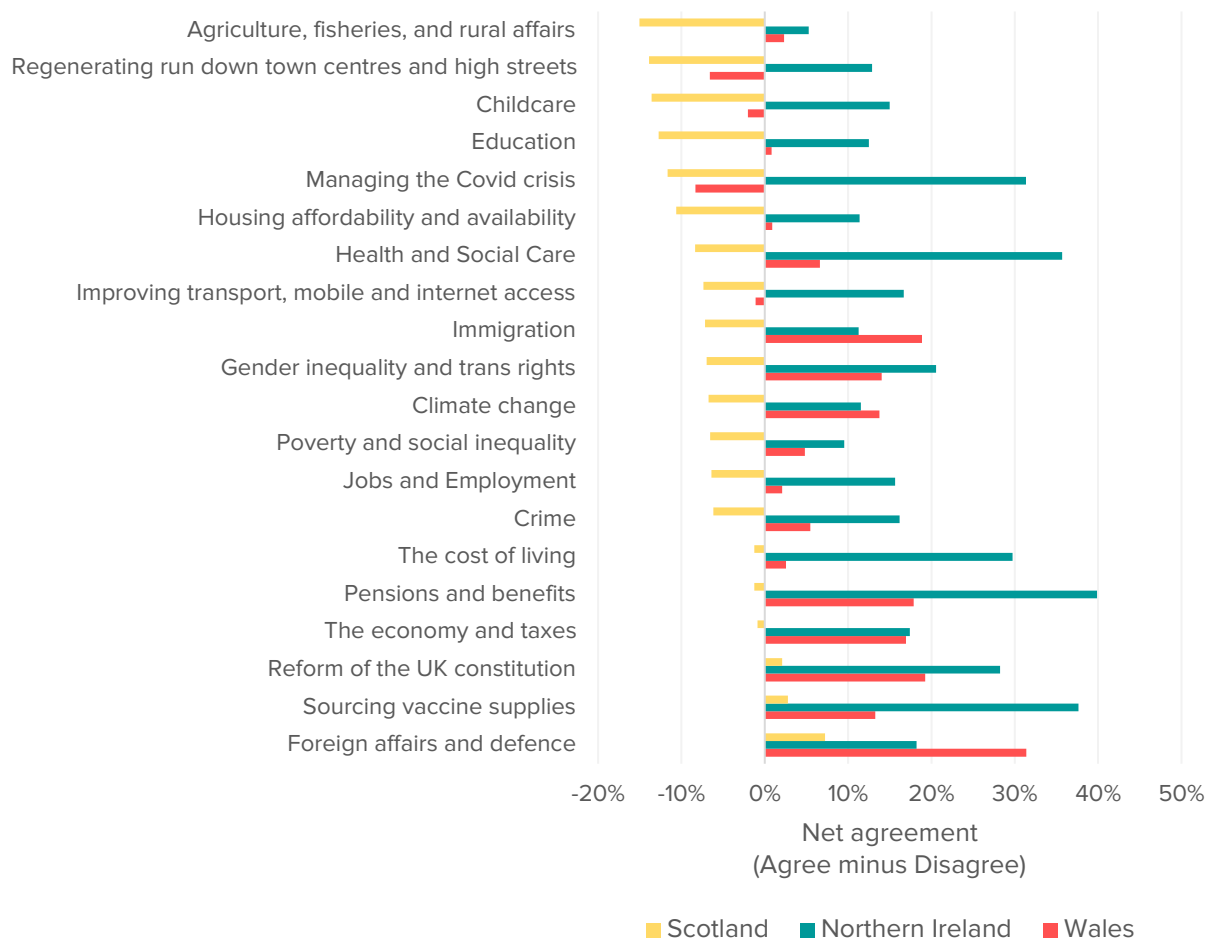
2. Issue ownership

In addition to issue salience, we tested the extent to which voters think these issues would be better handled within the UK or as an independent country. The results go a long way to show the difference between the Scottish debate, where voters increasingly see independence as the mechanism for improvement, and attitudes in other parts of the UK, where there remains a strong belief that policies are best served by remaining within the Union.

- As you can see in Figure 30 below, there are only three issues that Scottish voters think are better served within the United Kingdom compared to as an independent country: Foreign affairs and defence (+7%); Sourcing vaccine supplies (+3%); and Reform of the UK constitution (+2%). However, this obscures extreme polarisation between Yes and No voters, whose independence vote is now the lens through which they see different issues. For example, two thirds of No voters believe that vaccine supplies are better served by remaining in the UK, while half (48%) of Yes voters believe vaccine supplies would be better if Scotland were independent. This is best illustrated by the half of Yes voters who believe that reform of the UK constitution is best done via an independent Scotland.

Figure 30: Net agreement that different issues would be better as part of the UK, rather than as an independent country, by different nations of the UK

Source: Hanbury, 12 Feb - 1 March, Onward analysis



- Voters in Wales are much less convinced of the material benefits of independence. There are only four issues that Welsh voters think would be better if Wales were independent: Managing the Covid crisis (-8%), Regeneration of town centres (-7%), Childcare (-2%), and Transport and digital infrastructure (-1%). There is, on the other hand, very strong support for the idea that Climate change (+14%), the Economy (+17%), and Immigration (+19%) are better served within the Union.
- In Northern Ireland, voters do not believe that any issue would be better handled as part of a United Ireland. The issue with the smallest support for continued UK membership is Agriculture, fisheries and rural affairs, which may reflect ongoing concerns about the Northern Ireland Protocol, although there remains support for remaining in the UK on that issue. There is particularly strong support for the UK on four issues: Sourcing vaccine supplies (+38%), Pensions and benefits (+40%), Health and social care (+36%), and Managing the Covid crisis (+31%).

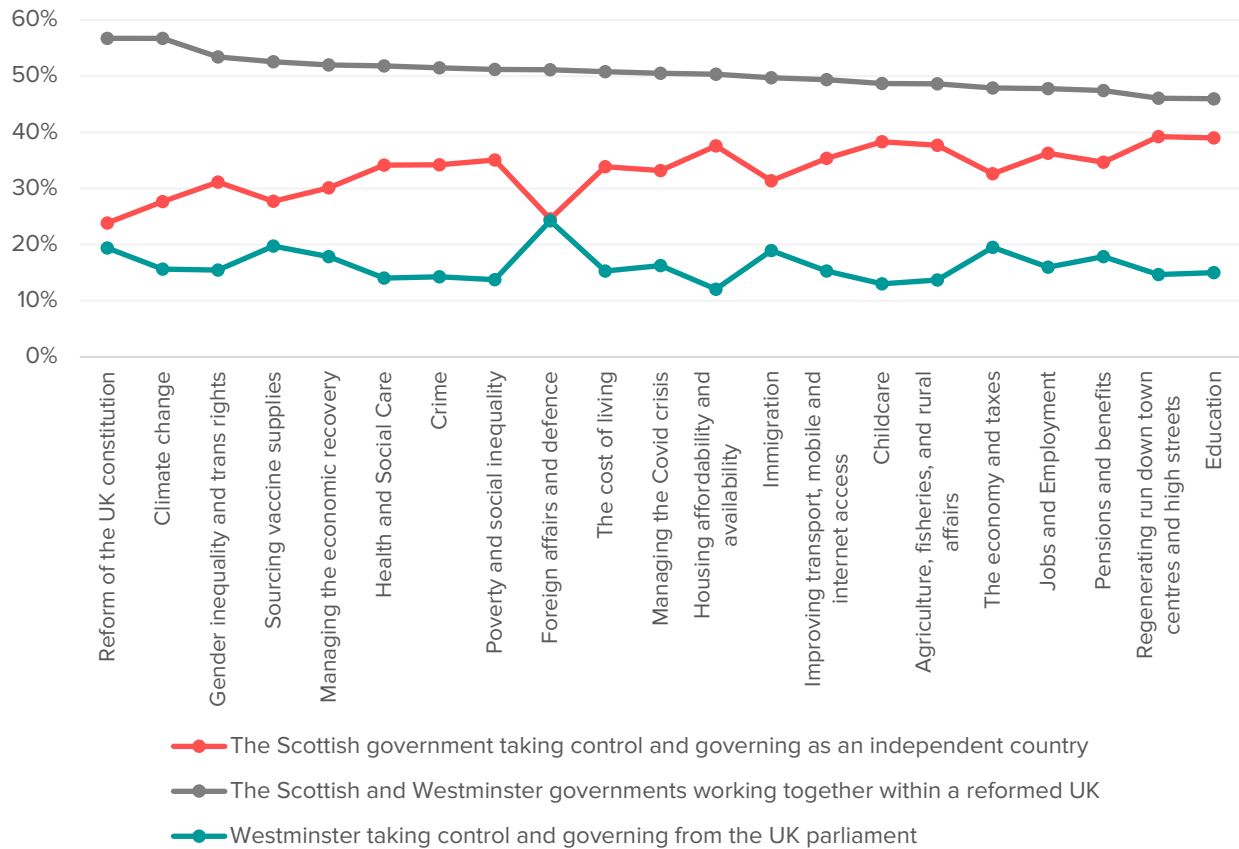
3. Westminster-Holyrood cooperation

There is strong support for collaboration rather than separation on the issues listed above. This is notable because it suggests that when people are given a forced choice between an independent Scotland and the status quo, they choose independence, but when there is a third option based on the two countries working better together, they become more pro-Union. This has potentially far-reaching implications for how to respond to independence support in future. We find that:

- Across every individual policy issue, more people would like to see the Scottish and UK governments working better together in a reformed UK than Scotland taking full control and governing as an independent country. This is particularly notable in the cases of climate change (57%), sourcing vaccine supplies (53%), managing the economic recovery post-Covid (52%), and health and social care (52%).
- Whereas a majority of No voters would, on every issue, prefer greater intergovernmental cooperation than either independence or direct rule from Westminster, Yes voters would rather see Scottish independence than greater cooperation. But the gap between these two preferences varies significantly.
- On issues such as housing, childcare and education, Yes voters prefer independence over Scottish/UK cooperation by margins of 38-40 percentage points. But on foreign affairs and defence, opinion is split more evenly. 47% would rather see Scotland take control as an independent country, and 44% would rather see the Scottish and Westminster governments working together within a reformed UK. On climate change, the gap is only 10 points (51% for independence and 41% for cooperation within the UK).
- When it comes to coronavirus, there is a large minority of Yes voters (39%) that would rather see the UK and Scottish governments working better together on sourcing vaccine supplies and managing the economic recovery than for Scotland to manage these things as an independent country.

Figure 31: ‘For each of the policy areas below, what approach do you think would deliver the best outcome?’ All voters

Source: Hanbury, 12 Feb - 1 March, Onward analysis



4. Effectiveness at handling coronavirus

As illustrated above, the pandemic and its effects continue to be the most important priorities for voters in every part of the UK. Healthcare, jobs and the economy, and managing the crisis are the top three issues in every nation. But how well do voters believe the UK and devolved governments have handled the pandemic? We find that:

- Voters in Wales, Scotland and Northern Ireland think the UK Government has performed worse than their respective devolved governments when making decisions to limit the spread of the virus. While Scottish voters are most critical of the UK Government, they also think the Scottish Government has performed badly on this metric, while Welsh voters rate their own Government highly (+40%). No voters think the Scottish Government has done better on this measure, and in providing clear information to the public.

- There is strong support for the economic support offered by the UK Government in all three devolved nations. In Scotland, No voters strongly support the UK government on its economic measures (+34%), although Yes voters marginally think the UK Government has performed badly (-2%). This is the only issue that Yes voters think the UK Government has got right. Overall, voters believe the Scottish Government has done better on this measure than the UK Government, while in Wales and Northern Ireland the UK Government is thought to have performed better than the respective devolved governments.
- There is widespread support for the UK Government for rolling out the vaccine in all three nations, with the strongest support in Wales (61%). Notably, even Yes voters in Scotland are sharply supportive of the UK's vaccine rollout, with net approval of +25%, although this compares to +60% for No voters. In Northern Ireland, net approval of the vaccine scheme is +42%.

Table 4: Whilst handling the Covid crisis, how well do you think the UK and devolved governments have done at..., Net handled well, by country

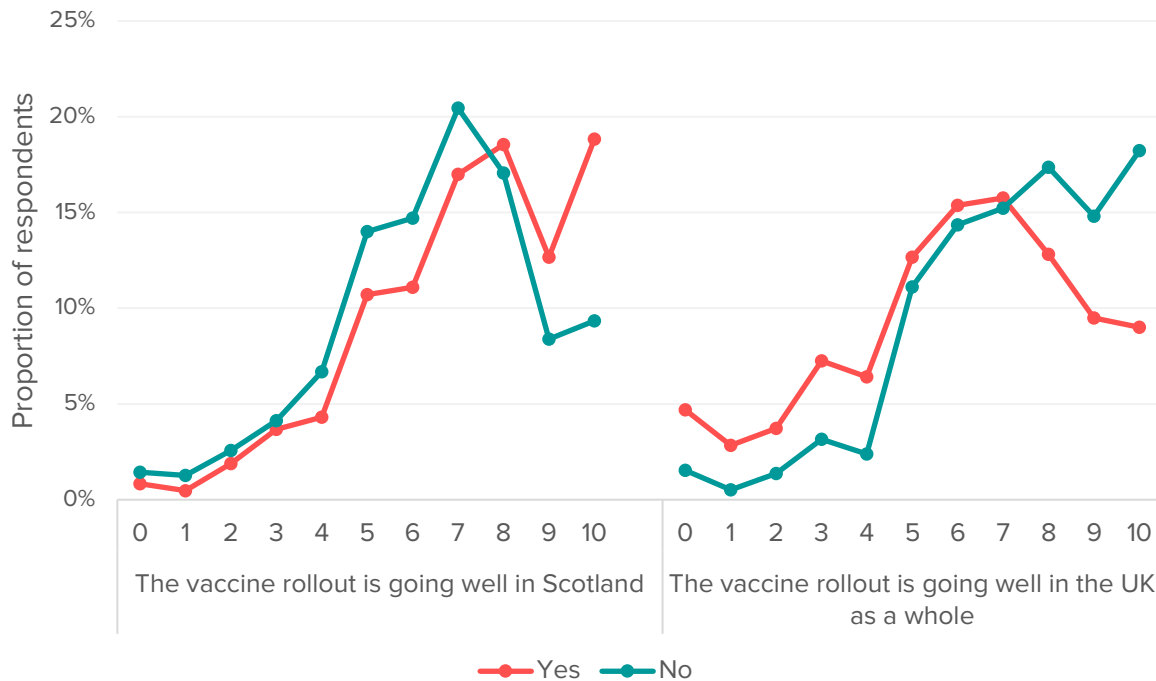
Source: Hanbury, 12 Feb - 1 March, Onward analysis

	Scotland		Wales		Northern Ireland	
	UK Govt	Scot Govt	UK Govt	Welsh Govt	UK Govt	NI Govt
Making the right decisions to limit the spread of the virus	-23%	-6%	-4%	40%	-6%	5%
Providing clear information to the public	16%	30%	3%	39%	-10%	14%
Providing support to soften the economic impact of the virus	12%	16%	36%	35%	29%	19%
Rolling out the vaccine	38%	34%	61%	63%	42%	42%
Managing the health and care system to treat those infected with the virus	13%	31%	35%	45%	30%	33%
Supporting children and young people in the education system	-15%	8%	-2%	16%	-5%	-15%

- We also asked respondents in Scotland a related question on the vaccine rollout, asking them the extent to which they agree with the statements that 'the vaccine rollout is going well in Scotland' and 'the vaccine rollout is going well in the UK as a whole' on a scale of 1-10. Overall, 71% of Scots think the vaccine rollout is going well in the UK, compared to 68% who think it is going well in Scotland.
- As you can see from Figure 32 below, Yes voters skew towards the view that rollout is better in Scotland than the UK as a whole, while No voters' opinions skew the opposite way. However, 70% of Yes voters think rollout is going well in the UK (compared to 78% in Scotland). For No voters, these figures are 80% for the UK and 62% for Scotland.

Figure 32: Perceptions of vaccine rollout

Source: Hanbury, 12 Feb - 1 March, Onward analysis



5. The performance of the First Minister

It is clear that a large share of support for the SNP and Scottish independence is stored in the personal brand of the First Minister, Nicola Sturgeon, and that this has been reinforced by her leadership during the Covid crisis. But how far is this true for all voters? And do different groups have differing perceptions of the First Minister and her leadership over the past year that varies from the Scottish average?

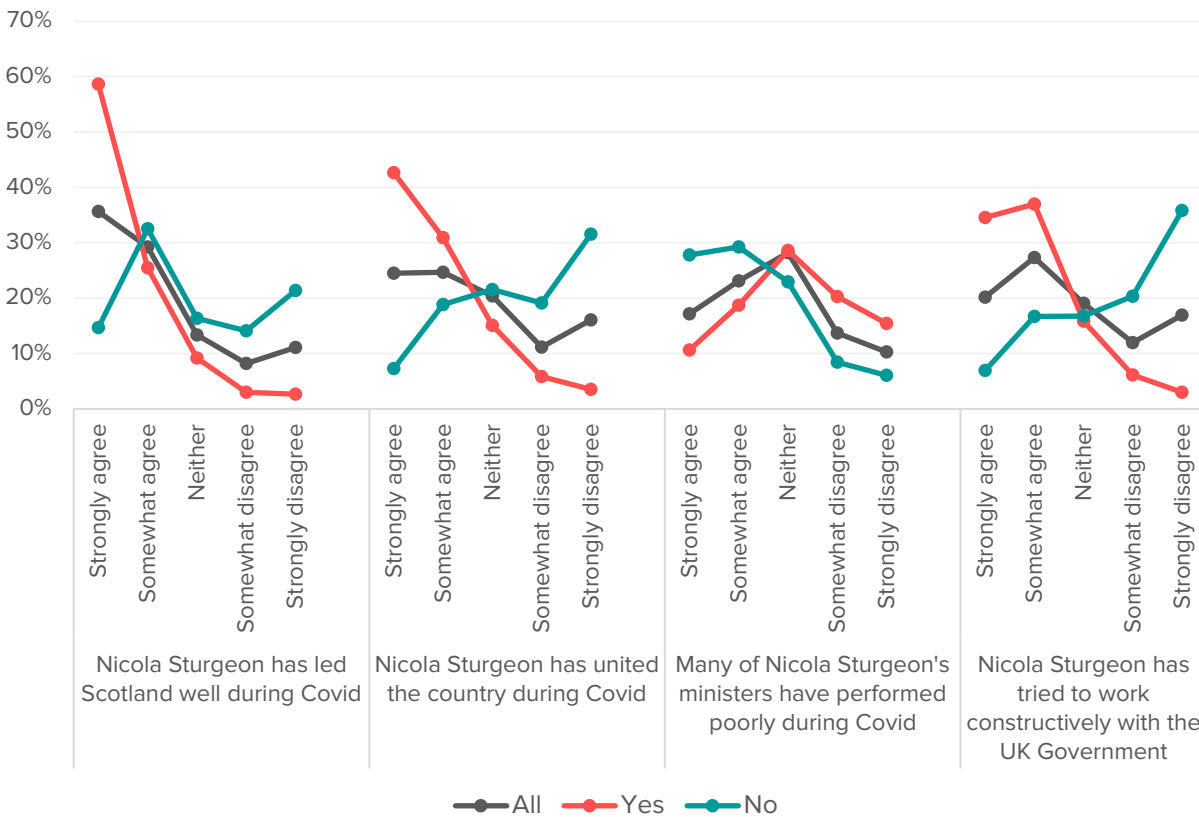
We find that:

- Yes voters unsurprisingly have much stronger, and more positive, views of Nicola Sturgeon. But No voters are not equally adamant in the opposite direction. 47% of No voters agree that Nicola Sturgeon has led Scotland well during Covid, while only 35% disagree. This popularity appears to be personal to the First Minister. In contrast, 29% of Yes voters and 57% of No voters agree that many of Nicola Sturgeon's ministers have performed poorly during Covid.
- Those on both sides of the debate look less favourably on the First Minister's ability to unite Scotland. 74% of Yes voters agree that Nicola Sturgeon has united the country during Covid, but this is significantly lower than the 84% who agree that she has led Scotland well during Covid. Among No voters, 26% agree that Sturgeon has united the country, while 51% disagree.

- We can break this down further, by age and gender. There is little difference between male and female Yes voters. But among No voters, men and women diverge, with Male No voters having more negative views of Nicola Sturgeon. In net terms, Male No voters are more likely to say she has led Scotland badly rather than well (-2%), while female No voters are likely to say she has led well (+26%). Among Male No voters, agreement is 17 points lower for the statement “Nicola Sturgeon has united the country during Covid” and 10 percentage points lower for the statement “Many of Nicola Sturgeon’s ministers have performed poorly during Covid”.

Figure 33: Has Nicola Sturgeon had a good pandemic?

Source: Hanbury, 12 Feb - 1 March, Onward analysis

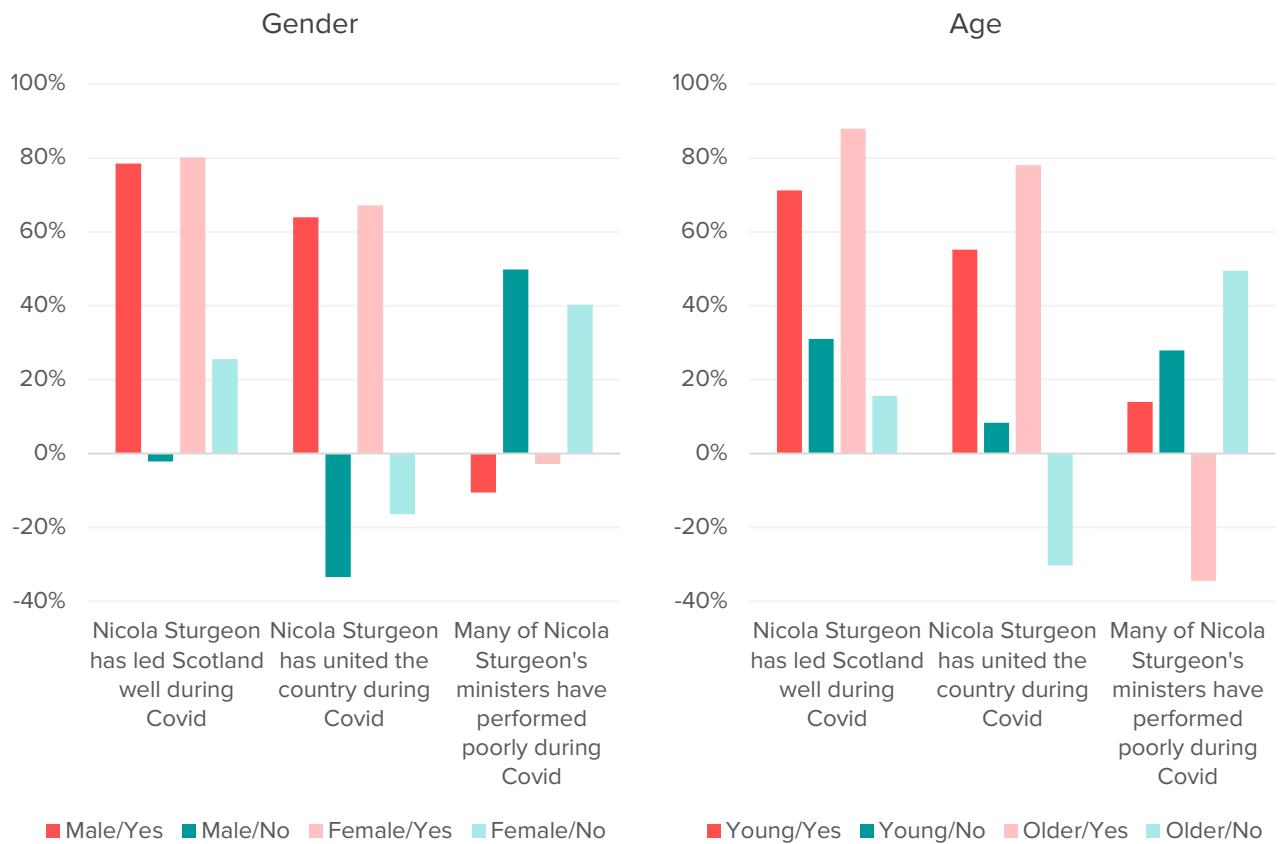


- There are even more significant differences in opinion between older and younger voters. We saw this pattern for national identity in the previous chapter. Yes voters aged 55 or over have a more positive opinion of Nicola Sturgeon’s performance during the Covid crisis than Yes voters aged 16-34. Younger Yes voters are 17 points less likely to think that Sturgeon has led Scotland well than older Yes voters and 23 points less likely to think that she has united the country. On the question of whether Sturgeon’s ministers have performed poorly during Covid, younger Yes voters have a net agreement of 14% - a view that is closer to that of young No voters than it is to older Yes voters.

- Similar sized gaps in opinion exist between younger No voters and older No voters. 54% Young No voters agree that Sturgeon has led Scotland well during Covid, compared to 24% who disagree - for a net agreement of 31%. But net agreement is only 16% among older No voters. Whereas older No voters disagree that Sturgeon has united the country (-30%), young No voters feel that her leadership has been unifying, albeit by a small margin of 8%. No voters, young and old, agree that Sturgeon’s ministers have performed poorly but, again, older voters are more likely to take a negative view (net agreement of 49% compared to 28% among younger voters).

Figure 34: Views of Nicola Sturgeon’s performance, by referendum vote intention, age and gender

Source: Hanbury, 12 Feb - 1 March, Onward analysis



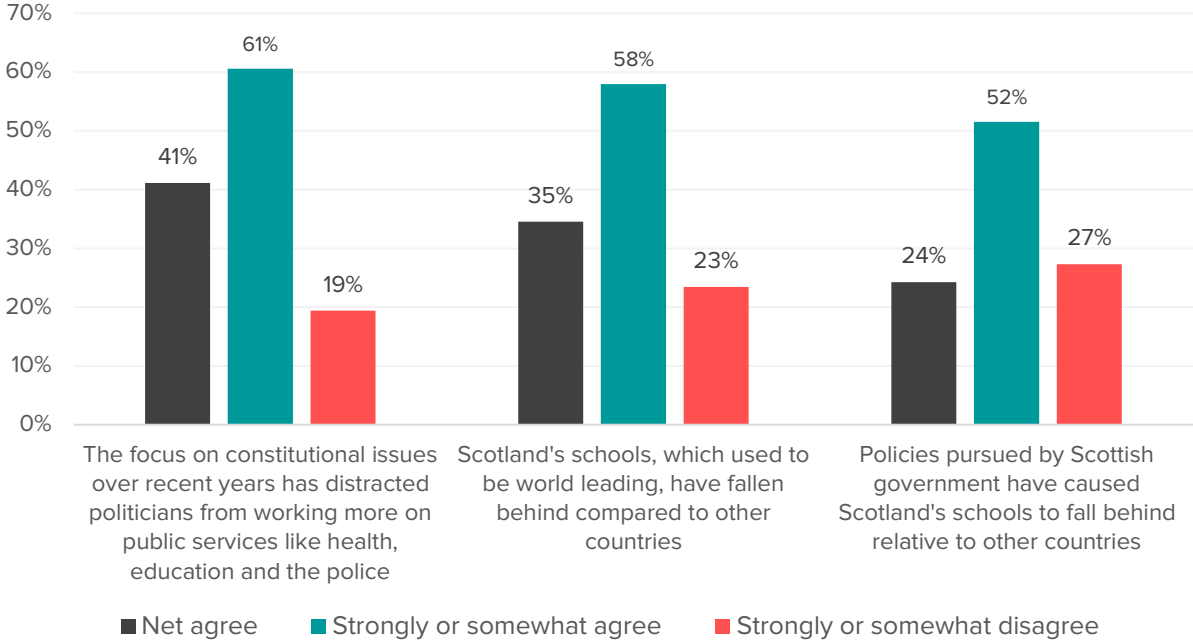
6. The costs of the SNP’s focus on independence

While our poll shows overall support for independence, it also reveals a strong belief that an excessive focus on independence is undermining progress on other issues, and significant concern about the quality of schools and healthcare in particular. For example, we find that:

- 61% of Scottish voters agree that “the focus on constitutional issues over recent years has distracted politicians from working more on public services like health, education and the police”, compared to just 19% who disagree. This is not a partisan issue: 59% of 2019 SNP voters and 50% of current Yes voters agree, compared to 22% and 24% respectively who disagree.
- A further 58% of voters agree that “Scotland's schools, which used to be world leading, have fallen behind compared to other countries”, against 35% who disagree. This is also not a partisan issue, with 51% of Yes voters agreeing, versus 72% of No voters agreeing, versus 31% and 16% who disagree, respectively.
- Where Yes and No voters differ is on responsibility for the decline of Scottish schools. While a net +24% of all Scottish voters agree that this is the result of “policies pursued by the Scottish Government, Yes voters are only marginally more likely to agree (+3%), versus +52% among No voters. It is however notable that 39% of 2019 SNP voters and 41% of Yes voters believe that the Scottish Government holds culpability for the slide in schools standards.

Figure 35: The effects of constitutional debates on wider public services

Source: Hanbury, 12 Feb - 1 March, Onward analysis



Conclusion

The overwhelming priority for voters is the coronavirus crisis, both in its immediate public health impact and the burden on the NHS, and the longer-term effects on jobs and growth. This is true for all voters in the United Kingdom. It is also clear that voters in all parts of the UK believe that the UK Government has done well during the pandemic on two key fronts: providing economic support and rolling out the vaccine, although there is less support for the decisions made to control the virus.

There is no real demand for constitutional issues to take precedence over the health emergency in Scotland, even if voters generally believe that issues would be better handled if Scotland voted for independence and that the First Minister has generally performed well during the pandemic. In Wales and Northern Ireland, voters generally believe that issues are still best handled within the UK, rather than through independence or Irish reunification.

Moreover, Scottish voters see the focus on constitutional debates as a distraction from other issues, notably schools. The fact that this is true of a substantial proportion of Yes voters as well as No voters demonstrates that this is not just partisanship at play, but a genuine concern for the declining quality of Scotland's schools. The SNP may struggle to maintain support for independence if school and health standards continue to slip.

Endnotes



¹ <https://www.scotsman.com/news/politics/no-vote-leads-first-scottish-independence-poll-in-22-amid-alex-salmond-controversy-3149474>

² Excluding Don't Knows.

³ Bogdanor (1999), *Devolution in the UK*

⁴ Ibid, p. 132

⁵ Ibid, p. 190.

⁶ MORI (1979-1988), <https://www.ipsos-mori.com/researchpublications/researcharchive/2781/Scottish-support-for-IndependenceDevolution-197895.aspx?view=wide>

⁷ https://www.natcen.ac.uk/media/1595212/bsa_35_scotland.pdf

⁸ Scottish Social Attitudes Survey, 1999-2019

⁹ Ballot Box Scotland, Onward Analysis.

¹⁰ Scottish Social Attitudes Survey.

¹¹ <https://www.walesonline.co.uk/news/uk-news/could-another-scottish-independence-referendum-19970187>

¹² Ashcroft (2014), *How Scotland voted, and why*; Henderson and Mitchell (2015), *The Scottish Question, Six Months On*.

¹³ Ashcroft (2014), *How Scotland voted, and why*. Full data tables.

¹⁴ Henderson and Mitchell (2015), *The Scottish Question, Six Months On*.

¹⁵ Henderson and Mitchell (2015), *The Scottish Question, Six Months On*.

¹⁶ http://bemis.org.uk/docs/code-census-briefing-scotland_v2.pdf

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¹⁸ See, for example, <https://carnegieeurope.eu/strategieurope/83632>

¹⁹ <https://www.gov.scot/publications/scotlands-future/pages/1/>

²⁰ Edinburgh Agreement, 2012

²¹ <https://www.gov.scot/publications/scotlands-right-choose-putting-scotlands-future-scotlands-hands/pages/1/>

²² <https://www.scottishlegal.com/article/parliamentary-sovereignty-no-longer-accurate-in-describing-the-uk-s-constitutional-settlement>

²³ <https://www.bsa.natcen.ac.uk/latest-report/british-social-attitudes-30/devolution/trends-in-national-identity.aspx>

²⁴

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/275762/13-510-national-identity-and-constitutional-change.pdf

²⁵ https://www.ark.ac.uk/nilt/2017/Political_Attitudes/IRBRIT.html

²⁶ <https://ukandeu.ac.uk/wp-content/uploads/2018/06/Scottish-Independence-and-Brexit-chapter-from-the-British-Social-Attitudes-survey.pdf>

²⁷ <https://www.bsa.natcen.ac.uk/latest-report/british-social-attitudes-30/devolution/trends-in-national-identity.aspx>

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