

In the first wave of a new, nationally representative survey of over 1,000 Scottish adults from 56 Degree Insight, 'Scotland's Viewpoint', we have discovered that the main issues that are concerning Scots most at the moment represent a mix of global, national and day-to-day living based challenges.

Firstly, we wanted a 'top of mind' understanding of the issues causing greatest current concern. We asked:

"Thinking about what's happening in Scotland and the wider world at the moment, what issue(s) are giving you most cause for concern?"

We asked this as an open-ended question - respondents were free to type in their responses in their own words – and so they represent the main concerns that Scots had in mid-January. It is clear that the Coronavirus pandemic remains the key 'top-of-mind' concern for the largest proportion of Scots with 43% mentioning this. Only one other single issue emerged spontaneously by more than 10% – the climate crisis/global warming being mentioned by 12%. Two other issues were mentioned by over 5% of Scots however – concerns around the UK Government, particularly focusing on 'Partygate' and the alleged behaviours of the Prime Minister (7%), and, closer to home, the constitution, and Scottish Independence was a top of mind spontaneous issue for 6% of Scots – and reflecting a mix of positive and negative opinions.



A whole host of other issues were mentioned – notably the continuing impacts of Brexit (4%), the state of the economy (3%), cost of living increases – especially relating to spiralling energy costs (3%) and specific concerns about the Scottish Government (3%).

Most of the above issues were reflected across the whole population – across gender, age and socio-economic groups, however there are some interesting variations.....

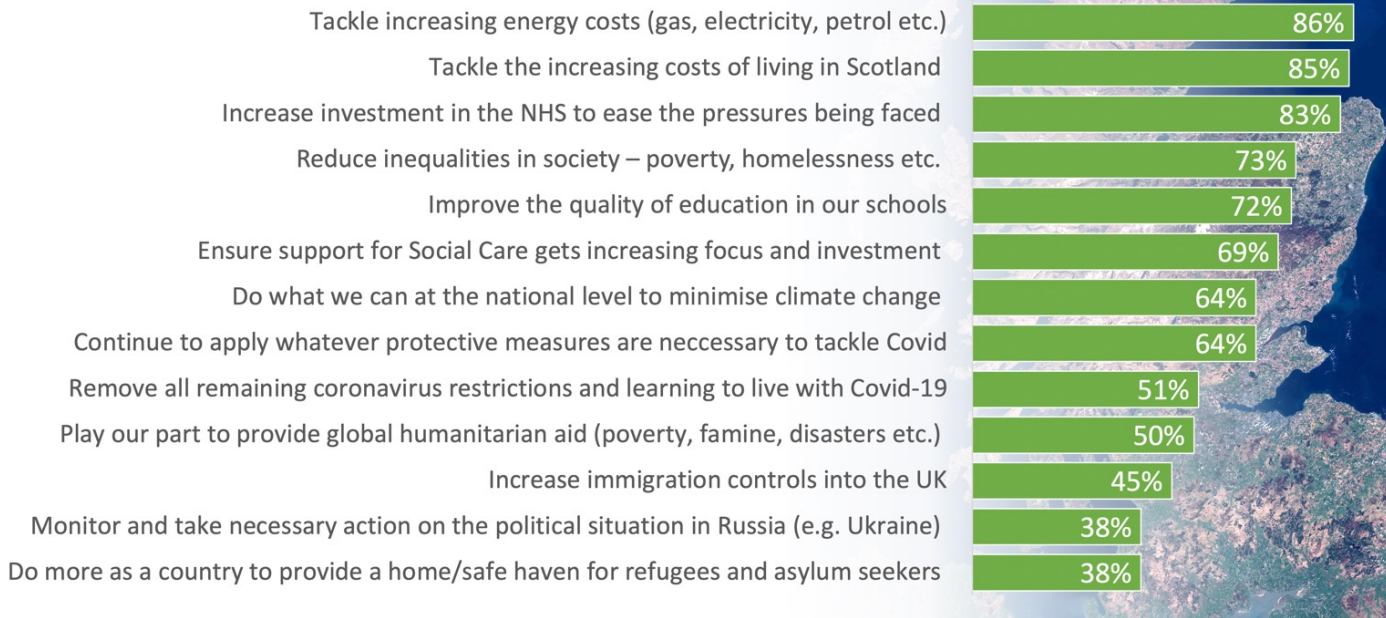
- **Coronavirus concerns** (43% overall): higher levels of concern amongst women (50%) than men (36%) and amongst the 25-44 and 65+ age groups (47%); lowest among those aged 16-24 (34%)
- **Climate change concerns** (12% overall): much higher amongst those aged 16-24 (at 34%, the same level as Coronavirus for this age group) and less of a concern for those aged 65+ (6%)
- **UK Government/Partygate** (7% overall): a greater concern for those aged 55+ (10%) than for under 45s (4%)

These top-of-mind concerns are just that – the spontaneous responses of Scotland’s population without any prompting. However we then provided them with a list of 13 potential issues and asked them to rate them in terms of how important they felt action should address each of these by the relevant organisation/authorities on a scale from 1 (Not at all important) to 10 (Extremely important). The higher the score out of 10, the more important that issue amongst Scotland’s adult population:

“Here are some specific issues that other people have mentioned. For each one in turn, please rate how important it is to you that action is taken to address this by the relevant authorities”

Essentially, the result is a menu of priorities across the population ordered from the most down to least important:

Importance that action is taken to address the following issues by the relevant organisation/authorities



Immediately evident is that, not surprisingly, the issues of greatest importance to Scotland’s residents tend to be those which affect them most directly. There has been much in the press about **increasing energy costs** – and as they are now appearing in peoples’ bills – with further increases expected in the Spring, it’s not surprising that 86% of Scots say that it’s important that these increased energy costs receive some form of intervention from the companies themselves but particularly Government. This is especially the case amongst the oldest in our population – 96% of those aged 65+ feel that this is particularly important and relevant to them. It is still important, but notably less so, for adults aged under 35 (78%).

And of course, energy costs are simply adding to **increasing costs of living in Scotland** – and 85% of Scots are concerned about this and feel that it is important that this is addressed by Government. It is especially the case among families and those in the 35-54 age brackets (91%). The NHS always features prominently in any population level research within the UK, and given the prominence of NHS Scotland over the last two years in particular as we have navigated the pandemic, and recent calls for additional resources, it's not surprising that close behind, 83% of Scots believe that **NHS Scotland requires increased investment and resource** to ease the pressures – both now and in the medium to longer term.

Two other issues were next in the 'league table' of importance. The need to address **inequalities in society - poverty and homelessness** in particular, and **improving the quality of education** in our schools are each deemed important by just under three quarters of Scots adults (73% and 72% respectively).

Investment and focus on social care has become increasingly high profile over the course of the pandemic, and this is illustrated by the fact that 7 in 10 Scots see this as important (69%).

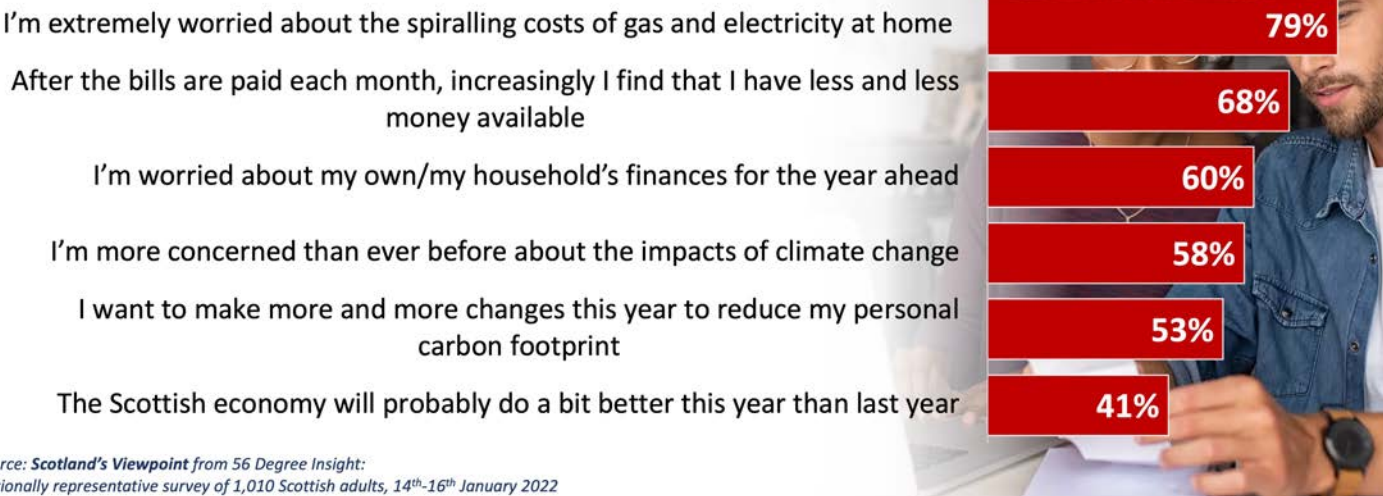
In the initial open-ended question, the pandemic and climate change were both identified as the two most prominent areas of concern. It is therefore interesting to note that their positioning in terms of priorities is lower than these other, often more direct impact issues already discussed. That said, just under two thirds still feel it is **important to apply whatever protective measures are deemed necessary to continue to tackle Covid**, whilst **tackling climate change at the national level** receives similar levels of claimed importance (64%).

Levels of importance attributed to the other areas covered are lower – each rated important by around half of the population or less. They do tend to be issues which are more indirect in their immediate effects – **the Russia-Ukraine situation**, and providing a **safe haven for asylum seekers and refugees** – but, that said, they are still deemed important by around four Scots in every ten (38%).

Having asked Scots to prioritise the issues that they felt should be addressed by the Government and organisations involved, we then focused on two key areas (finances and climate change) and asked for more specific impacts on them as individuals:

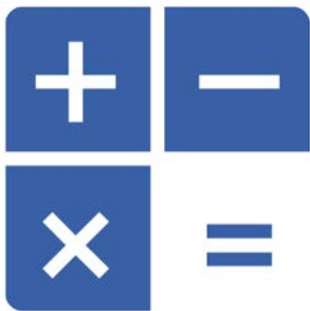
“Looking to the year ahead, please indicate the extent to which you agree or disagree with the following statements made recently by some other people who live in Scotland”

Levels of agreement amongst the Scottish population.....



Source: Scotland's Viewpoint from 56 Degree Insight:
Nationally representative survey of 1,010 Scottish adults, 14th-16th January 2022

Finances:



Their responses further highlight the worry in the population about the costs for electricity and gas at home – four in five describe themselves as ‘extremely worried’ about the spiralling costs (79%). This is especially the case amongst women (83%) and those in the 35-54 age bracket (84%). The impact is clear on a diminishing family budget: over two thirds of Scots say that after the bills are paid, increasingly they find themselves with less and less money available (68%). This is especially the case for families, over three quarters of whom find themselves in this position (76%). And three in five don’t see this as a short- term problem – they are worried about their personal finances for the year ahead (60%). This is again a particular concern for families (72%) but also for those in the C2 social class grouping (69%). And looking more broadly at the Scottish economy, this gloomy outlook is reflected: only four in ten believe the Scottish economy will do better in 2022 than in 2021 (41%).

Climate Change:



Personal worries about climate change are high – but generally significantly below concerns about personal finances. Just under three in five say they are now more concerned than ever about the impacts of climate change (58%) – though this is much more of a concern for younger adults than older adults (67% of the under 35s compared to 50% of the over 65s). However, a lower proportion seem willing to take more personal responsibility – 53% claiming they will make more changes this year to reduce their personal carbon footprint. This represents 5% fewer than those who are more concerned about the impacts of climate change – an illustration of a potential Value-Action gap in terms of personal responsibility which is reflected across all sections of society

In futures waves of Scotland's Viewpoint, the 56 Degree Insight team will track consumer sentiment on all of these issues. Over the coming weeks, look out for more findings around Scots' holiday and travel plans for 2022, their favourite Scottish brands and companies, and specific attitudes and behaviours around key events such as Burns Day, the Winter Olympics and Easter.

Scotland's Viewpoint



Scotland's Viewpoint is a new, regular survey of 1,000 Scots – statistically representative of the Scottish adult population. It is conducted online over the course of 3 days. The first wave of the survey ran from over the weekend of 14th-17th January and future waves will be run at least quarterly. As well as some key tracking questions about Scottish public opinion, we also offer space on the survey for client-confidential polling of the Scottish population. Please get in touch with either Jim or Duncan for more information:

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