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More United Than Divided: How Voters See Scotland's Future

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01

Executive Summary

The Labour Party's win in this week's Rutherglen and Hamilton West by-election did not come as a surprise. Turnout will be a source of debate: was this a result driven by disillusioned Scottish National Party (SNP) voters staying at home or a wave of inspiration carrying them to Labour? The outcome is clear evidence, as we set out here in this report, that tactical voting could be central in determining Scotland's political future. Either way this result, coupled with the data in this report, should give even the most ardent nationalists and unionists pause for thought.

Scotland is no longer a settled political landscape. The SNP grip on Scotland is loosening. A bold offer – one of credible hope that shows a way through a cost-of-living crisis and reforms seemingly broken public services – is in high demand. A political party that offers this at the next election can make gains.

The significance of the subordination of the constitutional question cannot be understated. 2024 marks a decade since Scottish politics was transformed by a divisive referendum and while for some the question of independence will forever define their political choices, a large chunk of the electorate are softer in their constitutional views. For them, it is pressing issues such as the cost-of-living crisis and the state of the nation's public services that occupy their minds. Independence is not a question for today. The two tribes of "Yes" and "No" are dwarfed in size by the three-quarters of the public who support a closer relationship with Europe or the two-thirds who say improving the National Health Service (NHS) should be a top priority. Providing credible answers to these deeply felt challenges could transform Scottish politics and Scottish public services after a prolonged period in which every performance indicator has flashed red.

Is this in the gift of any political party? First, it requires trust in handling the economy. Second, it demands an inventiveness – whether in carving out a future relationship with Europe or harnessing the transformative power of technology to change health care and education. As it stands, disillusionment dominates. Constitutional divisions built up over a decade will not dissipate overnight. A great deal of work remains to be done but given UK-wide polling, there is a clear opportunity for a Labour Party that has gained significant

ground since 2019, is within touching distance of parity with the SNP and is the party Scottish voters are most likely to say cares about ordinary people.

Looking ahead, it is possible to see the contours of an election fought on issues of competence in Holyrood and change in Westminster, and over competing policy visions for Scotland and the UK's future. With no obvious route to independence and Scotland's economic challenges plain to see, a message of credible hope and reform has the possibility of capturing the imagination and constructing a new coalition of voters.

To better understand this complex environment, the Tony Blair Institute for Global Change (TBI) commissioned Opinium to ask Scottish voters about their views on the political parties and the issues of most concern to them. This paper is required reading for how to go about building that coalition – and for those wanting a new era for Scotland.

KEY FINDINGS

- Labour has increased its vote share in Scotland to 28 per cent, up 9 points on the last election. Meanwhile the SNP is on 37 per cent (minus 8) and the Conservatives are on 18 per cent (minus 7). This would lead to a majority of seats for the SNP (34 out of 57), down from 48 out of 59 under the old boundaries in 2019.
- However, based on these figures, the SNP would have narrow majorities in around a dozen seats. A further shift to Labour would threaten its first place in both votes and seats.
- When respondents are asked how they would vote in a new independence referendum, “Yes” leads “No” by four points (45 per cent to 41 per cent). As other polls have found, neither side has established a significant and sustained lead.
- The SNP coalition is split on whether an independence referendum should immediately be held. A minority (41 per cent) of SNP voters want a fresh referendum held “as soon as possible”. More (47 per cent) want it deferred until “it appears likely that a majority of people would vote for independence”.
- Scotland's government has poor ratings for the way it has handled devolved responsibilities such as health, housing, poverty and drug

abuse. It has better, but still negative, net ratings for the way it has handled schools, crime and railways.

- The SNP has a better reputation than Labour in terms of having a clear sense of purpose and having Scotland's interests at heart. Voters have divided views on both parties on whether they are competent and "on my side".
- Scottish voters say the top priority for the next government should be improving the NHS, followed by delivering better schools and faster economic growth. Interestingly, given current debates within the Conservative Party, few Scottish Conservative voters say cutting taxes is a priority.
- Clear majorities in all three main parties think that the NHS's main problem is not money but the need for "radical changes" in the way it is run. They agree that it will not be enough to provide more money and they trust doctors, nurses and managers to spend it wisely.
- By almost three to one, Scottish voters want a closer relationship between the UK and the European Union (EU). Most would be willing to keep EU regulations on business, food safety, the environment and workers' rights rather than opting for the UK to set its own rules. Most Scottish voters would also admit more EU workers into the UK to boost the economy.
- On energy, the top priority for Scottish voters is keeping prices down, followed by tackling climate change and increasing the UK's energy security. Protecting jobs is a lower priority.

02

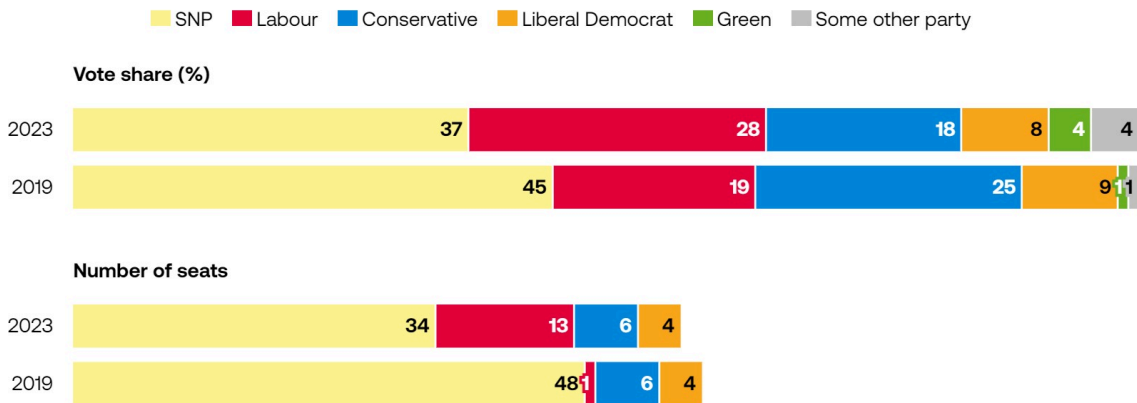
2024 General Election: The State of Play

Based on our polling, the SNP would still return by far the largest contingent of Scottish MPs, but its dominance would be reduced. It would be back to where it was in 2017, when it won 35 seats with 37 per cent of the vote. In that election, the Conservatives won 13 seats and Labour seven; this time those figures would be reversed, with the Conservatives once again slipping to third place.

FIGURE 1

In the next election, the SNP's dominance will be reduced as Labour makes gains

If there were a UK general election tomorrow, which party would you vote for?



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%. Note: The coming general election will be fought on new boundaries; Scotland will have two fewer MPs. This has hurt the Liberal Democrats, who have "lost" two of their four seats as a result. Based on the latest voting figures, they would win these back. So statistically this represents two gains; in practical terms, the Liberal Democrat status quo would be restored.

It is worth noting that in 2019, the two pro-independence parties (the SNP and

the Scottish Greens) together won 46 per cent of the vote, while the three pro-union parties (Conservative, Labour and the Liberal Democrats) won a narrow majority: 53 per cent. But under the first-past-the-post (FPTP) system, the SNP won the vast majority of seats because the unionist vote was divided among the SNP's opponents.

Currently, the SNP and the Greens together have 41 per cent support, while support for the three pro-union parties totals 54 per cent. If most of the 4 per cent "others" voted for a pro-independence party such as the Alba Party, the overall division of the vote between pro- and anti-independence parties would not greatly differ from 2019. The failure of the SNP to maintain its near monopoly on the pro-independence vote, more than a big drop in support for independence, lies at the heart of its problems. Yet the SNP could revive if it squeezed the Green and Alba (and any other small pro-independence party) vote and regained its monopoly among voters who want to leave the UK.

However, there are three potential risks to the SNP's prospects. The first relates to unionist tactical voting. Respondents were asked two tactical voting questions: how they would vote if they thought that the only parties with a realistic chance of winning their seat were (a) Labour or the SNP; and (b) the Conservatives or the SNP.

FIGURE 2

Labour benefits more from tactical voting than the Conservatives

How would you vote if you felt that the only parties likely to win your local constituency were (a) Labour or the SNP or (b) the Conservatives or the SNP?



How would you vote if you felt that the only parties likely to win your local constituency were (a) Labour or the SNP or (b) the Conservatives or the SNP?



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

Based on these figures, tactical voting might gain Labour two or three extra seats from the SNP, while the Conservatives would not benefit at all and might even lose one seat.

Tactical voting contributed to the size of Labour's victory in the Rutherglen by-election. The Conservative vote collapsed from 15 to 4 per cent. In 2019, more than 29,000 voters supported a unionist party (Labour plus Conservative plus Liberal Democrat), while fewer than 24,000 voted SNP. But Labour secured the backing of just 63 per cent of unionist voters, so the SNP regained the seat. In the latest by-election, Labour won 90 per cent of the unionist vote. Had 90 per cent of anti-SNP voters backed a single unionist party in each constituency throughout Scotland in 2019, the SNP would have won 20 fewer seats.

A bigger risk to SNP dominance lies in the way the FPTP system works. FPTP has plainly helped the SNP to win big majorities in the last three general elections; it has often won seats with well under half the local vote. The party benefitted not just because the anti-SNP vote was divided, but because its own vote was evenly spread. With one exception (Edinburgh South, won by Labour), it won between 34 per cent and 54 per cent of the vote in every seat. This contrasts with the much greater range of votes won by Labour (from 4 per cent to 47 per cent) and the Conservatives (from 10 per cent to 49 per cent).

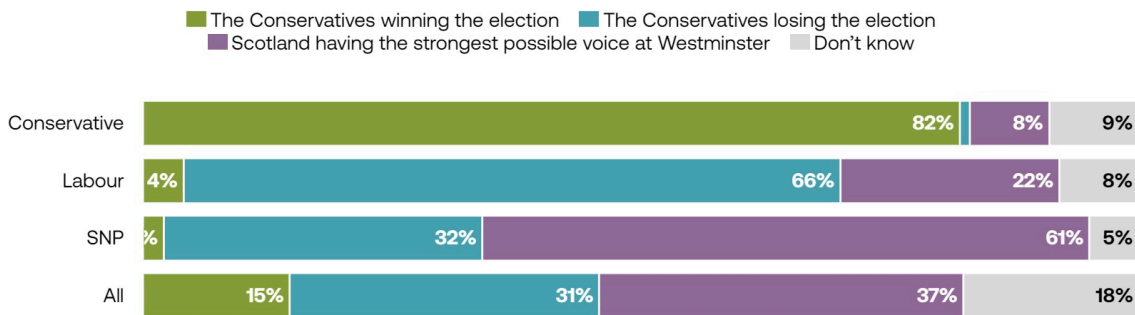
While a broadly even distribution is a blessing to a party that is doing well, it becomes a curse to a party on the slide. Based on current voting intentions, the SNP still benefits from the evenness of its support, albeit not as much. The 8.5 per cent swing to Labour (the SNP down 8 points since 2019, Labour up 9 per cent) wins Labour 12 seats. But Labour would now be close behind in a dozen others; a further swing of just 4.5 per cent would win Labour 12 more seats. With votes level, Labour would have more MPs (25) than the SNP (22 – and possibly 20, as two of the seats in which the SNP is being challenged by the Conservatives would be too close to call).

The SNP's third vulnerability is that because it fights fewer than one in ten of the UK's 650 seats, it can never form a government at Westminster. It must campaign to be Scotland's voice in the House of Commons, while its Labour and Conservative rivals ask voters to decide who runs Britain. Respondents were asked which of three possible electoral outcomes mattered most to them:

FIGURE 3

Labour and the SNP both have groups of voters who could prioritise the outcome of the election over party loyalty

Thinking about possible outcomes of the next UK general election, which ONE of these matters most to you?



Source: Opinion for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

The Conservatives have the clearest way forward: campaign to re-elect Prime Minister Rishi Sunak and avoid getting drawn into debates about Scotland's voice. But the SNP and Labour both have minorities about whom they need to be concerned: the 32 per cent of SNP voters whose first wish is to defeat the Conservatives and the 22 per cent of Labour voters to whom the power of Scotland's voice at Westminster matters more than putting Labour leader Keir Starmer in Downing Street. This quandary could be eased in the event that Scottish voters believe a Labour victory across Britain is certain once the campaign gets under way. Conversely, as the national campaign begins to focus on the real possibility of a change of government, this could benefit Scottish Labour.

The political drama that the Scottish electorate can create was most obvious in 2015, when Labour collapsed and the SNP gained 50 seats. But volatility has been a feature of both the subsequent elections in 2017 (SNP vote share down 13 points, Conservatives up 14) and 2019 (Labour down 9 points, the SNP up 8). Our figures, like those of other polling companies, suggest that the volatility among the Scottish public remains. This makes the next general

election impossible to predict some months out.

There is, though, a more fundamental point about the volatility of recent years. Scottish politics is often depicted as a battle between two fixed and utterly different tribes: SNP/pro-independence versus anti-SNP/unionist. If these tribes were so large and so fixed, we would not be seeing the volatility that has characterised party loyalties since the 2014 referendum.

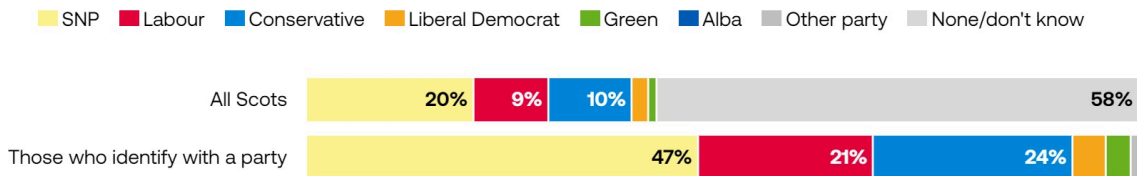
Our polling suggests the committed tribes of Scottish politics are smaller than might be expected. Respondents were asked, “Do you generally think of yourself as a supporter of one particular party or not?” Those who said they did were asked which party they supported. Just 42 per cent said, “Yes, I think of myself as a supporter of a particular party”; the remaining 58 per cent said no (48 per cent) or don’t know (10 per cent).

The SNP enjoys a clear lead among the 42 per cent who said “Yes”, but the fact remains that its committed supporters comprise just one in five Scottish adults. These figures also suggest that Labour’s recovery, as measured by voting intention, remains dependent on the support of voters who do not say they automatically identify with the party.

FIGURE 4

Most voters do not identify with a particular political party

Do you generally think of yourself as a supporter of a particular party or not? If you do, which one?



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

03

The Battles Over Independence and IndyRef2

Doubts about the sizes of Scotland's committed tribes are relevant to the debates about independence and a second referendum. When people are asked how they would vote in a new referendum on Scottish independence, the polling finds a four-point lead for "Yes" (45 per cent) over "No" (41 per cent). This lies at the upper end of polling support for "Yes": recent surveys by other companies range from a 4 per cent lead for "Yes" to a 9 per cent lead for "No". Although poll-of-poll averages have fluctuated, they have done so in recent years within a modest range. Neither side has established a decisive, let alone sustained, lead on the issue.

Moreover, "Yes" voters are divided on the priority they give to independence. While 64 per cent of them agree with the official SNP view that "it's vital for Scotland to become independent as soon as possible; our other problems cannot be solved until we leave the United Kingdom", 30 per cent say that "independence is the right objective, but right now there are more urgent things to be done first, such as fighting inflation, raising living standards and tackling the consequences of Brexit".

This means that if we count the views of the Scottish people as a whole:

- 29 per cent regard independence as a priority
- 14 per cent want independence but say there are more urgent priorities right now
- 41 per cent oppose independence

(The remaining 16 per cent say "don't know" to one of the questions.)

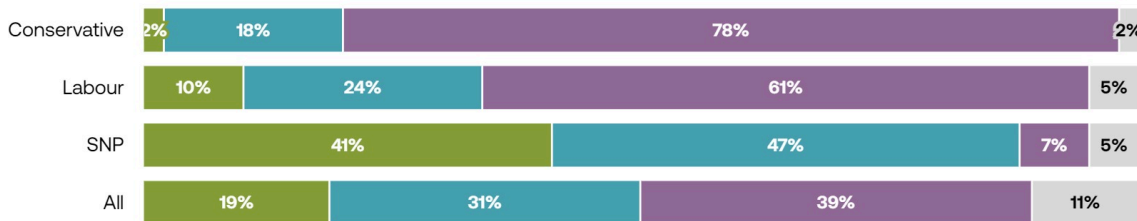
This relates to the timing of another referendum. Not only are SNP voters divided; by 47 per cent to 41 per cent they reject the party leadership's desire for the vote to be held as soon as possible. They would prefer to wait until victory seems likely.

FIGURE 5

There is no consensus among SNP voters on when another independence referendum should be held

Which of the following comes closest to your view on the timing of a referendum on Scottish independence?

- There should be a referendum on Scottish independence as soon as possible
- There should be a referendum on Scottish independence if and when it appears likely that a majority of people would vote for independence
- There should not be a referendum on Scottish independence
- Don't know



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

These figures suggest that even when “Yes” voters narrowly outnumber those who say “No”, only minorities back the SNP’s official view that independence is an urgent necessity requiring IndyRef2 to be held as soon as possible. This poses a tactical challenge as the party prepares for the next general election. Its activists are firmly in the urgent priority camp, but many of its voters are more cautious. How can the SNP straddle that divide?

The Conservatives have no such problem: they appeal to unionist, anti-referendum voters, and so can offer a clear and consistent view. Labour’s position is slightly trickier. Most of its current voters oppose a referendum in all circumstances. But if Labour is to maximise its gains at the next election, it must woo the group of SNP voters who are attracted by the dream of independence but think that other challenges must take priority for the time being. Reassurance as to whether, when and under what circumstances another referendum could feasibly occur might achieve that. But it might also alienate strong pro-unionist voters who want to rule out independence and put an end to arguments about IndyRef2.

04

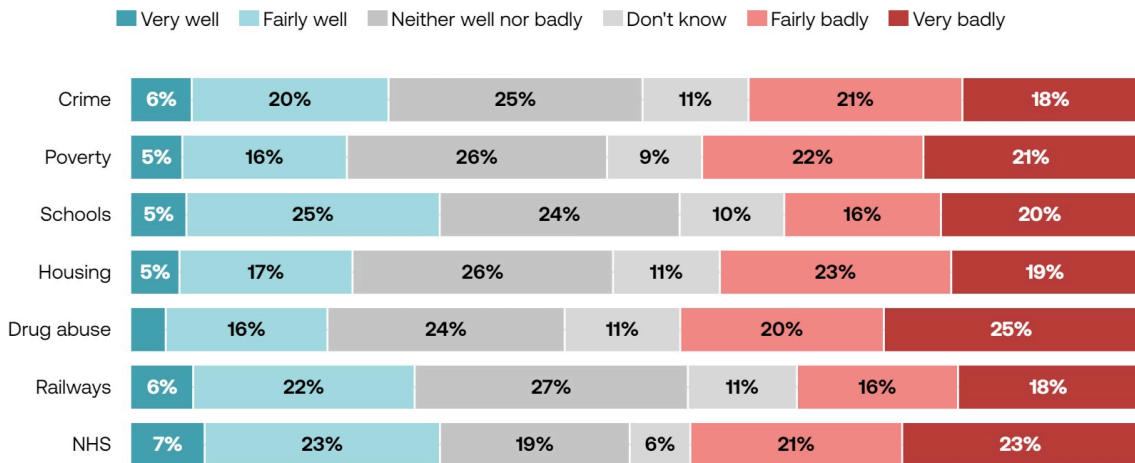
Assessing the SNP's Record in Government

Meanwhile, the general election will be a test of the SNP's record after 16 years in government. The following table gives the verdict of Scottish voters on seven devolved issues. While it is the next Holyrood election that will determine whether or not the SNP remains in power, in practice the reputation of the SNP's members of the Scottish parliament in Edinburgh cannot be separated from the standing of its MPs in London. They rise and fall together.

FIGURE 6

Many voters are unimpressed with the Scottish government's record on key issues

How well do you think the Scottish government has handled the following issues?



Source: Opinion for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

The figures are not particularly positive, especially in terms of the National Health Service (NHS), housing, poverty and drug abuse. The SNP does best (or least badly) on education, though more people say it has done “badly” than

“well”. It is also worth noting how few enthusiasts – people saying it has done “very well” – there are for the SNP’s record . The percentages range from 3 (drug abuse) to 7 (the NHS). On every issue far more people say the SNP has done “very badly”, with a percentage range of 18 (crime and railways) to drug abuse (25). Even SNP voters have concerns about many issues. Their highest “very well” verdict, for the way the SNP has run Scotland’s health service, is 17 per cent. There is no other issue on which more than 12 per cent of SNP voters say it has performed “very well”. On three issues – tackling drug abuse, improving housing and cutting poverty – fewer than half of SNP voters give a favourable verdict, with majorities saying the SNP has done “badly”, “neither” or “don’t know”.

These figures are by no means fatal to the SNP, given the significance of other issues and attitudes to Labour and the Conservatives. But they do suggest that SNP support might be vulnerable. If the SNP’s less committed supporters find other reasons for their loyalty to waver, the party might not have its record in tackling Scotland’s problems to fall back on.

05

How Party Leaders and Brands Compared

As well as its record in office or opposition, two other main elements feeding into a party's reputation are its leaders and its brand appeal. However, none of the seven most prominent politicians has a positive score:

FIGURE 7

Scottish voters are not inspired by any of the leaders across the main parties

Do you have a favourable or unfavourable opinion of the following? (Totals shown are net scores; favourable minus unfavourable.)



Source: Opinium for TBI

The key message is that – for the first time in a decade – there is little difference between leading Labour and SNP politicians. All have challenging figures; none are catastrophic. One in three Scottish voters have yet to make up their mind about Scottish Labour leader Anas Sarwar. Six months into his time as Scotland's first minister, Humza Yousaf has yet to make a clear impression on 21 per cent of voters. Among those who have formed a view, a

net score of minus 15 will do little to cheer him up.

The larger point is that there is currently no standout star in Scotland, or more widely in Britain, who inspires Scottish voters. Labour has not seen the overwhelming response from voters that either Tony Blair or Donald Dewar¹ (first minister when Scotland's parliament reconvened in 1999) garnered, while former first ministers Alex Salmond and Nicola Sturgeon have seen their stars fade since their glory days.

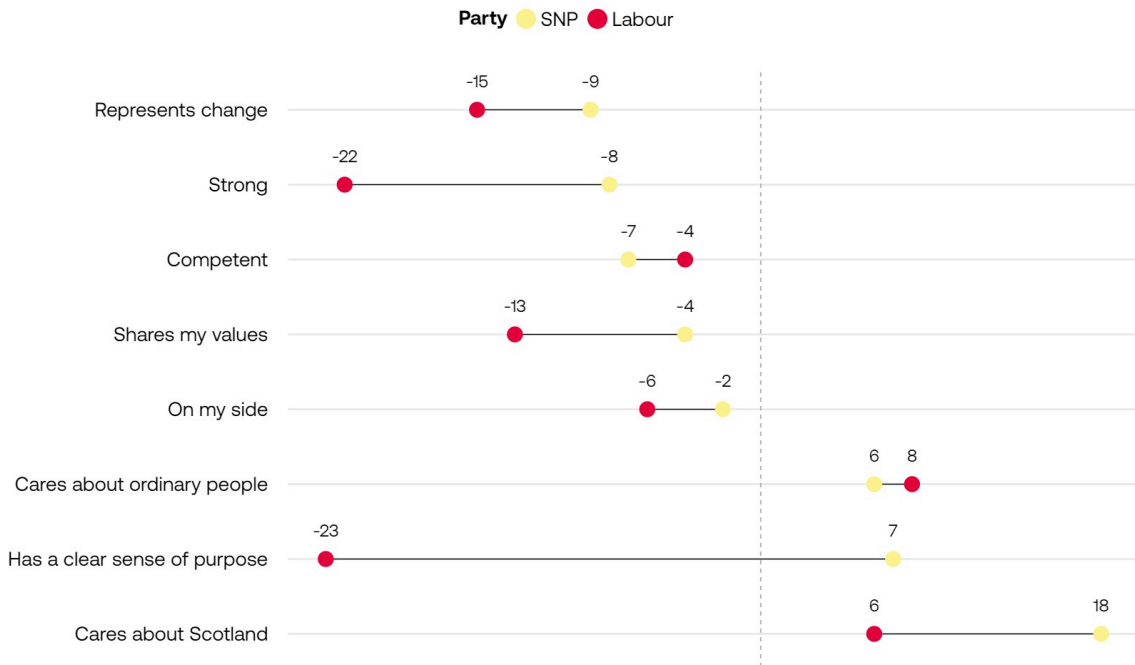
If personalities give neither Labour nor the SNP a clear advantage over the other, what about the parties' brands – their perceived qualities? Political scientists distinguish between “valence” and “positional” attributes: between parties' general characteristics on the one hand, and their specific policies and ideological stance on the other. Many floating voters over the years have decided how to vote on the basis of valence rather than positional judgements.

Here is how voters rate the SNP and the Scottish Labour Party on ten valence attributes:

FIGURE 8

When it comes to brand, the SNP is outperforming Labour

How do you rate the SNP/Scottish Labour Party on the following characteristics? (Totals represent net scores; positive minus negative score on each attribute.)



Source: Opinium for TBI

These results tell a different story. While there is little difference between the two parties on leadership, Labour lags well behind the SNP on some key brand characteristics: strength, values and having a clear sense of purpose. However, the two parties are close on three attributes that are arguably the most important: competence, being “on my side” and “caring about ordinary people”.

06

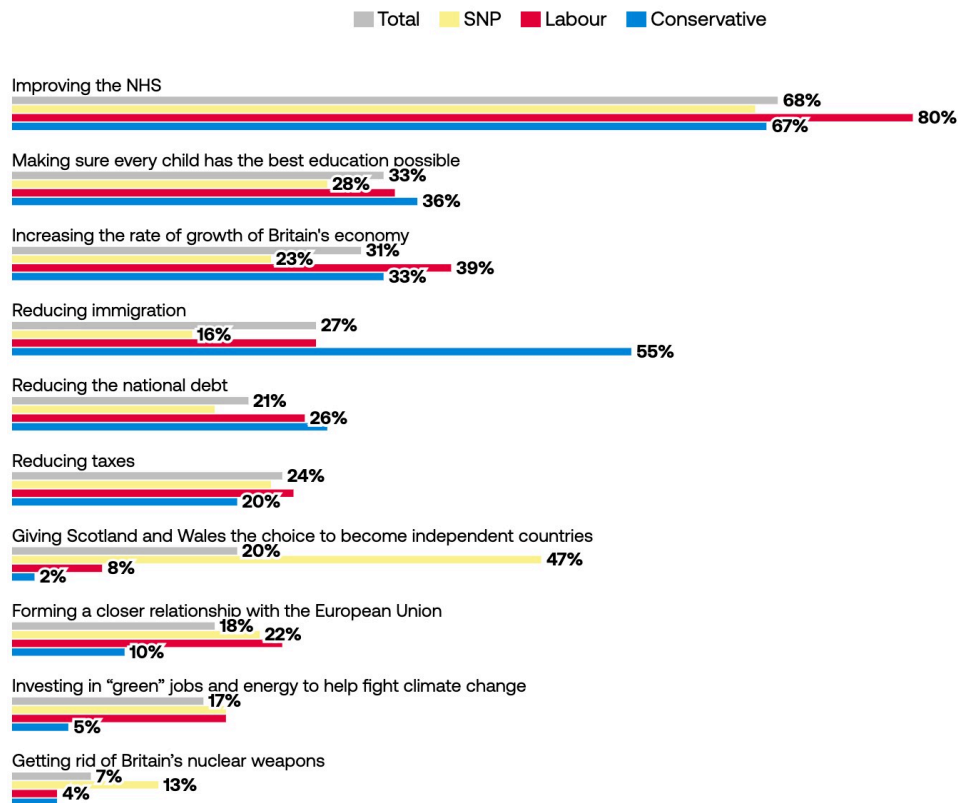
Priority Issues for Scottish Voters

From a list of ten issues, respondents were asked which three should be the top priorities for Britain's government after the next general election.

FIGURE 9

Voters want the government to prioritise social and economic concerns over tax cuts and Brexit

Thinking about the challenges facing the British government after the next general election, which of these should be its main priorities? Please select up to three.



Source: Opinium for TBI

The results are interesting not for the unsurprising confirmation that improving the NHS comes way ahead of any other issue, but in terms of what voters are not prioritising. For example, despite strong demands from many Conservative MPs in London for tax cuts, slightly fewer Scottish Conservative voters than SNP or Labour supporters say tax cuts are a priority. And a passion for getting rid of nuclear weapons is just as rare among Labour as Conservative voters. (Most of the minority who feel strongly about this have migrated to the SNP.)

When separately asked what the biggest issues facing Scotland are, then dealing with Brexit, like combatting climate change, comes relatively low down for supporters of all parties, although both issues exercise more SNP than Labour or Conservative voters. These issues will present serious, time-consuming challenges to the next prime minister; both have the potential to fire up voters' passions. For the moment, however, voters regard solving social and economic problems closer to home as more urgent priorities.

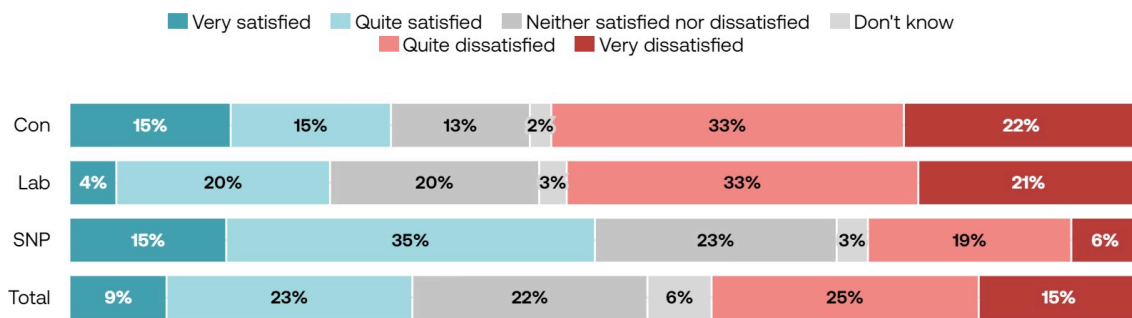
THE NHS AND ITS FUTURE

These days more Scots are dissatisfied (40 per cent) than satisfied (32 per cent) with the NHS in Scotland. When asked about the NHS in their local area, the dial shifts a little (36 per cent to 36 per cent). These are bad numbers for what has traditionally been the most highly regarded of public services. SNP voters unsurprisingly have the most positive view, but just half of them are satisfied, with the other half divided between dissatisfied and "neither".

FIGURE 10

Voters are concerned about how the NHS is performing

How satisfied or dissatisfied are you with the way in which the NHS runs in Scotland nowadays?



Source: Opinion for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

As we have already seen, the Scottish government's record for running the NHS is not well regarded by voters (although it scores less badly than on some other issues such as poverty, housing and drug abuse). Respondents were asked for their views on an increasingly prominent question about the future of the NHS: whether radical reform or more money is needed most. They were asked which of these two statements came closer to their view:

Statement A: "If the NHS is to provide a good service in the years ahead, more money alone won't be enough. The NHS needs radical changes to how it works, with new ways of running its hospitals, organising its doctors and nurses, and applying the latest technologies to diagnose and treat patients."

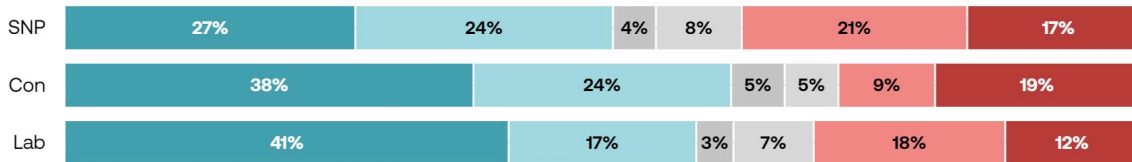
Statement B: "The NHS has always evolved and will continue to do so. The main problem these days is money. If the NHS was given enough, we should trust doctors, nurses and managers to take the right decisions for their local communities. Calls for radical reform are a distraction."

FIGURE 11

There is support for the idea of radically reforming the NHS

Which statement is your view closer to?

- Much closer to: NHS needs radical reform, hospitals run differently, embracing latest technology
- Slightly closer to: NHS needs radical reform, hospitals run differently, embracing latest technology
- Neither
- Don't know
- Slightly closer to: Main problem is money; trust doctors, nurses and managers to spend it wisely
- Much closer to: Main problem is money; trust doctors, nurses and managers to spend it wisely



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

It is striking that clear majorities of supporters of all parties want reform – and most of them say they are “much” closer to backing reform rather than simply the provision of more money. This verdict is important but must be treated with care. While the principle of reform is plainly popular, some people may change their view when faced with specific measures, especially if these are opposed by particular groups of health workers who are asked to change the way they work. The key to any government embarking on a reform agenda will be to persuade patients that reform is being undertaken via the right process. It will need support for the journey, not just the destination. However, the finding that the principle of reform is so popular means that a government setting about change the right way has a good chance of retaining popular support.

Another finding will encourage advocates of reform. Scottish voters are evenly divided over whether they personally would be willing to pay higher taxes to fund more spending on the NHS. SNP voters are more prepared than Conservative voters to pay more, with Labour voters in between. But the larger point is that voters in all three parties are divided. Historically in Scotland, as in the rest of Britain, polls have reported a willingness much of the time for voters

to pay higher taxes to fund better services. In the current economic climate, with high inflation, stalled living standards and rising taxes, a radical policy of reform that can plausibly secure better outcomes from each pound spent on the NHS stands a real chance of keeping a majority of voters on its side.

BREXIT AND THE EUROPEAN UNION (EU) RELATIONSHIP

Although Brexit is low down in voters' priorities, no government will be able to ignore the issue or its potential to erupt at any time into a controversy that arouses great passion in the electorate.

By two to one (59 per cent to 28 per cent), Scotland's electors say the UK was wrong to leave the EU. Among those who take sides, the verdict is wrong: 68 per cent; right: 32 per cent. In the 2016 referendum, Scots divided by 62 per cent to 38 per cent in favour of staying in the EU, so opinion has moved further in a pro-EU direction.

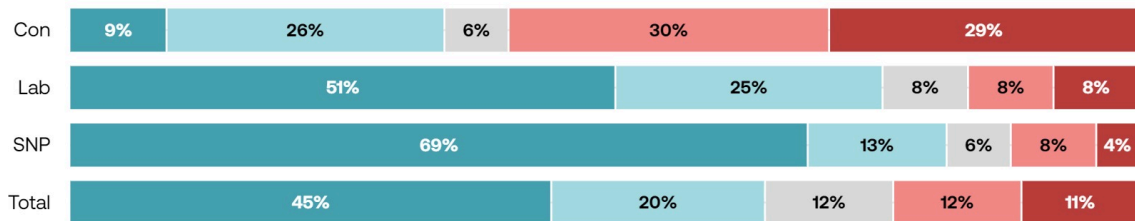
However, while many Scots wish to turn the clock back and restore the UK's membership as it was before the referendum, that is not on offer. An application to rejoin the EU would require years of negotiations. Respondents were asked to choose which of four options they would prefer.

FIGURE 12

Voters clearly want a closer relationship with the EU

Which of the following comes closest to your view?

- We should rejoin the EU
- We should remain outside the EU but negotiate a closer relationship than we have now
- Don't know
- We should remain outside the EU and keep the same relationship as we have now
- We should remain outside the EU and negotiate a more distant relationship than we have now



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

The appetite for moving closer to the EU is clear. Whatever the long-term destination of Britain's relations with the bloc, Scottish voters want steps in the near future to secure a closer relationship with Brussels. This approach is even supported by half of those who voted Leave in 2016. (Among this group, 14 per cent now say rejoin, while 36 per cent would like closer relations while remaining outside the EU.)

As to the elements that a "closer relationship" might involve, Scottish voters have clear views on the three propositions that were tested. Voters were shown two statements and asked which of them their view was closer to. (Opinium tested the same propositions with a UK-wide sample. The results are similar, with the Scottish response slightly more pro-EU than in the rest of the UK. UK figures below are in parentheses.)

EU versus UK regulations:

"The UK should agree voluntarily to follow some EU rules and regulations in order to reduce trade barriers with the EU": Scotland: 57 per cent (UK-wide

response: 54 per cent)

“The UK should keep the freedom to decide its own rules and not accept those decided by the EU, even if that means higher trade barriers with the EU”: 28 per cent (34 per cent)

Neither/don't know: 15 per cent (11 per cent)

Food safety, the environment and worker rights:

“The UK should maintain at least the same level of rules as in the EU to protect such things as food safety, the environment and worker rights”: 68 per cent (65 per cent)

“Now that we are out of the EU, we should try to outcompete with the EU and have lower regulatory protections in these areas”: 17 per cent (21 per cent)

Neither/don't know: 15 per cent (14 per cent)

EU workers entering the UK:

“The UK should allow EU workers to enter the UK more easily in order to address labour shortages in the NHS, restaurants, hotels, construction and other sectors of the economy”: 61 per cent (57 per cent)

“The UK should NOT allow EU workers to enter the UK more easily, as it is more important to control our borders and limit immigration than to tackle labour shortages”: 25 per cent (32 per cent)

Neither/don't know: 14 per cent (11 per cent)

These results are similar to those for the initial question about whether or not to move closer to the EU. The broadly pro-European coalition holds together even when specific proposals are made that might be expected to provoke public resistance, such as accepting EU regulations and admitting more workers to Britain from the EU.

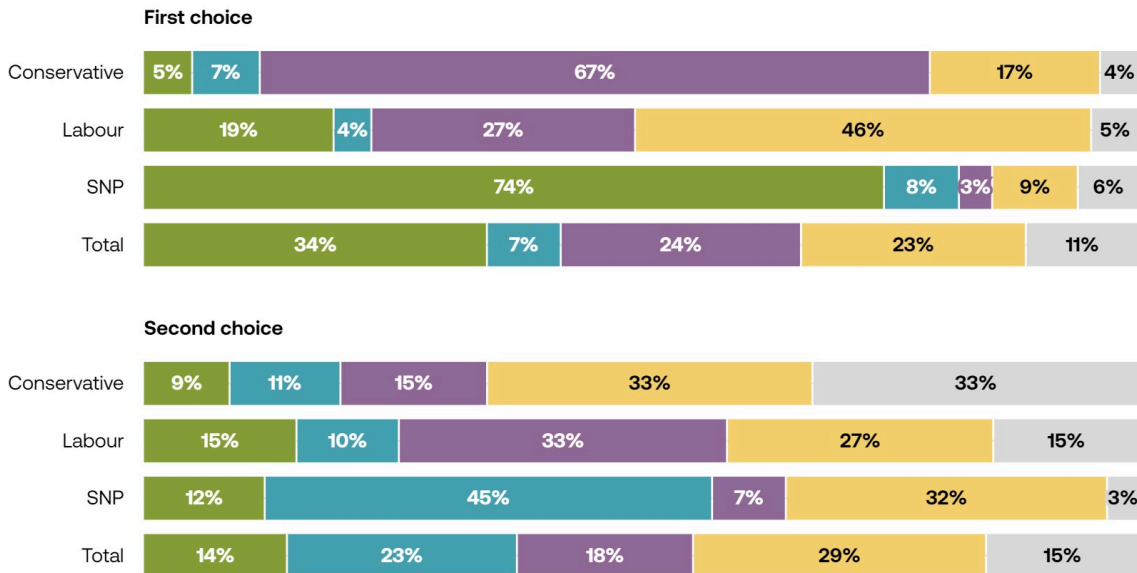
The polling then brought the issues of EU membership and Scottish independence together. Respondents were asked which of four long-term options they most wanted and which would be their second choice.

FIGURE 13

If they had to choose, some SNP voters would prioritise reversing Brexit over independence

In the long term, say ten years from now, which one of these would you most like to see?

- An independent Scotland within the EU
- An independent Scotland outside the EU
- Scotland remaining within the UK and outside the EU
- Scotland remaining within the UK and Britain rejoining the EU
- Don't know



Source: Opinium for TBI. Note: Due to rounding of the polling data, the data visualisations may not add up to exactly 100%.

The most popular option, albeit with just one-third of all respondents, is an independent Scotland inside the EU. Not surprisingly, the preferences of Labour and Conservative voters are very different. And the pattern of first and second preferences among Labour and Conservative voters comes as little surprise either: the vast majority of both parties' voters chose unionist options both first and second.

The real interest is how SNP supporters feel. As might be expected, their first preference is overwhelmingly for an independent Scotland inside the EU. But if

they can't have that, and have to choose between EU membership as part of the UK and independence outside the EU, independence wins out but not overwhelmingly; fully one-third would give up their dream of independence if that was the price to pay for reversing Brexit. A Brexit policy that makes clear a Labour government would move the UK towards a closer relationship with the EU provides an obvious tool for Labour, if it wishes to sway SNP voters for whom independence is a second-tier priority.

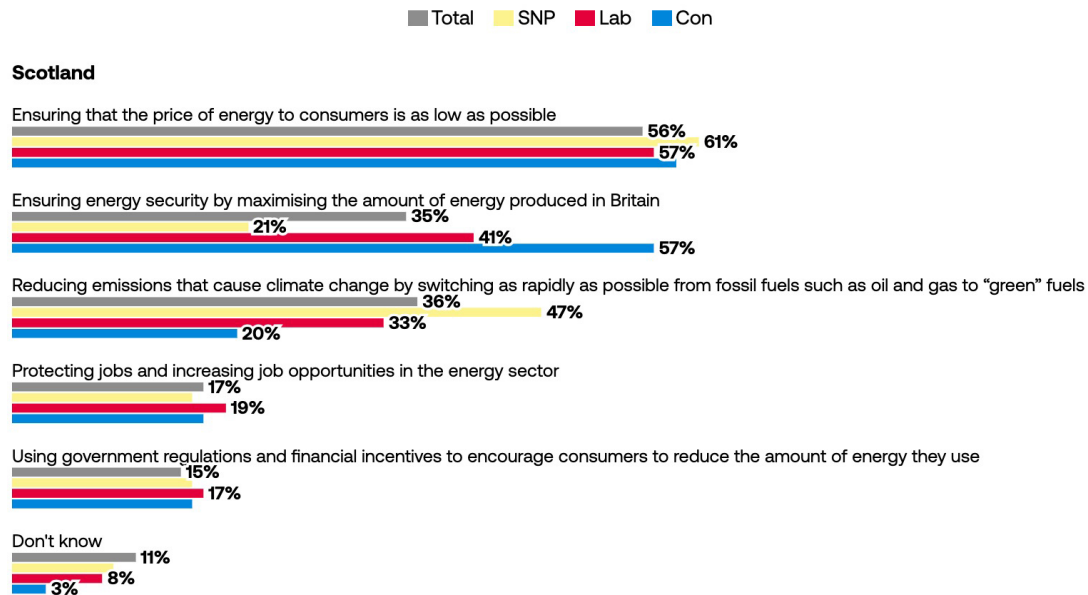
ENERGY SECURITY AND CLIMATE CHANGE

High gas and electricity prices have caused great hardship for many voters at a time when fears about climate change have provoked debate about the future of energy production. As Scotland has a special interest in the future of North Sea oil and gas fields, and what might happen to jobs in this sector, voters were asked for their priorities. As with Brexit, Scottish views are similar to those of the UK as a whole.

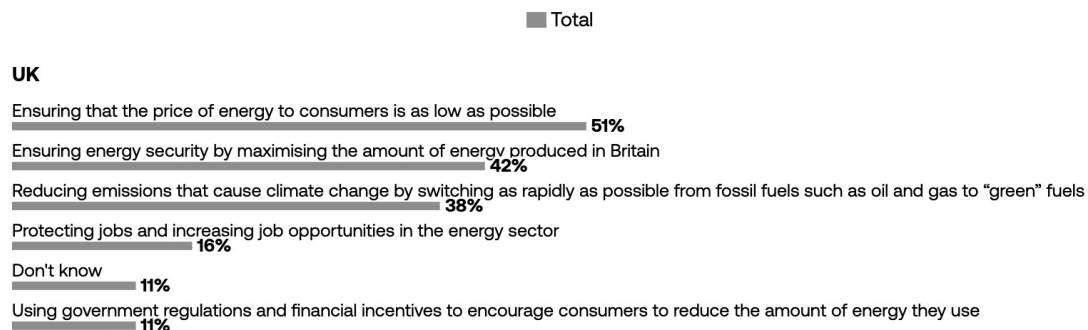
FIGURE 14

To voters, keeping prices down trumps emissions reduction and energy security

Turning to the future of British energy production, which of these should be the government's main objective(s)? Please select up to two.



Turning to the future of British energy production, which of these should be the government's main objective(s)? Please select up to two.



Source: Opinium for TBI

The verdict – for Scotland and also the UK as a whole – is clear. Keeping prices down is the top priority, with emissions reduction and energy security vying for second place. Protecting jobs and policies to reduce energy consumption come much lower down; this suggests that campaigns to protect jobs in the North Sea oil and gas fields have had less impact than their advocates might have hoped. Indeed Scottish views are much the same as in the UK as a whole, which suggests that this issue does not have as much resonance north of the border as might have been expected. SNP supporters prioritise emissions reduction over energy security; Conservatives prefer the opposite trade-off.

07

Conclusion

Many of the themes running through this analysis will be familiar to voters across the UK. An unpopular incumbent government that looks increasingly bereft of ideas. Weary concern across the electorate about a stagnant economy and public services in need of reform. Above all, a widespread feeling that politics is not working.

Yet there are some ways in which these data show a story particular to Scotland. The political vacuum left by the departure of Nicola Sturgeon – whose net popularity was consistently in positive territory for almost all her tenure as first minister² – has yet to be filled by the SNP or any other party. While Labour has commanding leads across nearly all policy areas in the rest of the UK,³ in Scotland the party is still behind the SNP in vote intention. Support for the SNP has declined, but it certainly has not collapsed.

One of the key themes of the general election in England and Wales is likely to be the scale of tactical voting against the Conservatives; in Scotland, a key question is whether a significant minority of Conservative voters will cast their ballot tactically for the Labour Party. At the same time, one of Scottish Labour's key hopes is that voters attracted to the idea of independence look beyond Scotland to the UK-wide picture and the opportunity to remove the Conservative government from Downing Street. This means that Scottish Labour will have to perform something of a balancing act. The fact that by 2024 the SNP will have been in power in Holyrood for 17 years, and the Conservatives in Westminster for 14, is likely to help Anas Sarwar in uniting two different, but disillusioned, sets of Scottish voters.

The Conservative Party in Scotland will not go into the next election with as many advantages as Labour. It has a clearer story to tell: if you want to keep Rishi Sunak in Downing Street and the UK intact, then vote for the Scottish Conservatives. In 2017, the success of a similar pro-union message led the Conservatives to their best result in Scotland since 1983. Now, the data show the Conservatives in a firm third place. Of the seven political figures we polled in Scotland, Douglas Ross and Rishi Sunak were by some distance the least popular.

Yet perhaps the biggest difference since 2017 – and the clearest message – is

that the political and economic context has changed. The conditions are there for an appeal beyond the constitutional question of independence. Looking to the future, voters in Scotland are united in worry about their household bills and the state of an NHS in urgent need of reform. Governments north and south of the border are both seen as culpable. While Brexit has now taken place, it is clear that a pro-European message tied to the genuine possibility of a closer relationship would still be a vote winner in Scotland.

These are the contours of a strategy which could lead a volatile Scottish electorate to, once again, create an electoral shock with implications across the UK. The final ingredient is an ambitious, hopeful and progressive policy agenda that looks to the future. The party that offers it has the opportunity to end a decade of division in Scottish politics.

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Methodology

TBI commissioned Opinium to undertake a survey of Scottish voters' views on political parties, key political questions and priorities for government. Opinium interviewed 1,004 Scottish adults between 5 and 14 September 2023. The data have been weighted to age and gender, education, 2019 vote, 2016 referendum vote and political attention. Due to rounding of the polling data, data visualisations and figures may not add up to exactly 100 per cent.

Full data tables can be found [here](#).

Endnotes

- 1 <https://www.ipsos.com/en-uk/political-attitudes-scotland-march-1998>
- 2 <https://yougov.co.uk/politics/articles/45244-nicola-sturgeon-seen-doing-good-job-scots-most-her>
- 3 <https://www.ipsos.com/en-uk/three-four-think-britain-becoming-worse-place-live>

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