The Demographics of Independence

2018 Edition

—A study of polling on and since the 2014 referendum—

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Preface

Despite regular polling before, during and after the 2014 Scottish independence referendum there appears to have been little analysis of which segments of Scotland’s society voted in a particular way. Less still has been conducted in the time since with most of the headlines and attention given over to not much more than the overall Yes/No split.

This paper – an update on one published in January 2017 - investigates many of the polls published since September 2014 in an attempt to draw out trends which other reporting may have passed over. Through this, the independence movement may be better able to understand how the “materially changed” circumstances which have triggered the upcoming independence campaign may have also have affected voters intentions and preferences. By better understanding the current priorities and preferences of voters, it will be easier to build a new independence campaign which specifically targets those voters who need to be convinced or re-convincied of the merits of independence.

Key Points:

• As of March 2018, the overall headline Yes/No poll lies within a margin of error of the results of the first independence referendum in September 2014. Approximately 43% Yes, 57% No.

• Age remains a very strong correlator of voting intention. Voters aged 16-41 are more likely than not to vote Yes whereas voters above 41 are more likely to vote No.

• The median age of Scotland’s voting population is 48 implying that there may exist a “natural majority” for No based solely on age.

• A significant rural/urban split has been identified. Council areas with a higher population density were significantly more likely to vote Yes than council areas with lower population density.

• There was a general trend of increasing voter turnout correlated with age although the then newly enfranchised 16-17 year old voters were particularly motivated to take up their first ever opportunity to vote.

• Since 2014 there has been a steady decline in support for independence amongst SNP voters, particularly since “Brexit”. This decline has been largely counter-balanced by an increase in support amongst Labour, Liberal Democrat and (marginally) Conservative voters.

• Since 2014 there has been a steady decline in support for independence among voters within the ABC1 social grade bracket. Pro-independence sentiment within the C2DE bracket declined for much of this period but has recently upturned.

• The ABC1 bracket experienced a significant “bounce” in support around the time of the EU referendum but this has proven short lived and has since vanished.
• Age is an important indicator of pro-independence sentiment. 16-24 year olds of both genders are significantly more pro-independence than the equivalent age group was in 2014.

• Older voters have become less in favour of independence since 2014 – male voters in particular are changing their minds.

• Non-UK citizens – long against the idea of independence – appear to have been profoundly affected by the EU referendum and are now pro-independence by a strong majority.

• Given the disparate nature of the various segments the of Scottish voting population an independence campaign based on targeting any one group or based on the political ideology of any one party would be highly unlikely to succeed.
1. Introduction

In the almost four years since the 2014 Scottish independence referendum and the two years since the EU referendum the constitutional debate continues to be a dominating force in the Scottish political consciousness. Almost all political polls since 2014 have put the independence question to those they have polled which has resulted in a continuous stream of data regarding not just the attitudes towards independence and how they have evolved through the changing circumstances since the vote but also a glimpse at who holds those attitudes and how support for independence has waxed or waned amongst different segments of society. It is vital that those who continue to advocate for independence understand both their current core voting base and those that they wish to win over in the upcoming campaign so that a successful and convincing argument can be placed to the nation. Whilst few democratic movements can ever hope to achieve unanimity, it would do the independence campaign great harm to focus efforts on a strategy or a series of messages which drove away more voters than it won over.

2. The Demographics of Scotland's Democracy

Between the census conducted in Scotland every ten years and the annual midyear population estimates conducted by the National Records of Scotland, it is possible to measure to a good degree of precision the population and demography of Scotland down to a council area level which is convenient for the purposes of this study as this is also the level at which the results of the 2014 independence referendum were published. This allows a great deal of correlation between various aspects of the two datasets.Outlined in this section shall be some key demographics of the Scottish population which will be vital in understanding the questions and observations examined later.

2.1. Population and Age Distribution

Scotland’s population was estimated to be 5,347,300 in mid-2014 rising to 5,424,800 in mid-2017. The minimum voting age for Scottish residents for the purposes of Scottish elections and “local” referendums such as the 2014 independence referendum is 16 which gives a total potential voting pool for mid-2017, assuming 100% registration and turnout, of 4,507,385. The median age of the Scottish voting population (i.e. those aged 16 or above) is approximately 48.

In terms of age distribution Scotland, like many Western countries, exhibits a broadly stationary population distribution – where population is more or less distributed evenly until tapering off at older ages – and is beginning to enter a phase of constriction where declining birth rates and other factors reduce population distribution at younger ages relative to older ones. Barring external factors such as a policy of encouraging greater net immigration to Scotland (the devolution of immigration powers to Scotland has significantly raised in priority in the recent political discourse however such devolution is stridently opposed by the UK Government) or an increase in birth rates, this trend is likely to continue for the foreseeable future. As it is at present, the demographics of Scotland have changed noticeably since 2014. As mentioned, the overall population has increased by 77,500. There has been an increase in
the population aged 25-64 of around 52,500 in this time plus 44,000 more people aged 65 and over. However, the population of Scotland aged 16-24 has dropped by 24,000 between mid-2014 and mid-2017. As shall be seen later, this demographic shift may play into the type of campaign run in a future independence referendum and the type of person primarily targeted by such a campaign.

2.2. Income distribution

Few robust figures exist for the distribution of income throughout Scotland and those which exist for the UK provide Scotland only as a small, statistically less reliable sub-sample. If one assumes, as a first principle estimate, that Scotland’s income distribution is broadly similar to that of the UK then a useful if illustrative chart may be drawn. The median income by this measure is around £22,000 per annum although it should be noted that this figure includes only those people who earn an income therefore excludes those people who are not be earning any income at all – estimated by the IFS to be around 22% of the population aged 16-64. It can be surmised therefore that the actual median income of all people of voting age will be somewhat below this figure. For reference, the new Scottish starter rate of income tax affects around 90% of the population whilst the basic rate income tax band is paid by most people from decile 2 upwards but the £43,000 higher rate income tax band isn’t paid until above decile 8 (less than 15% of the overall population pay the higher rate). The £150,000 additional rate tax band is paid by only around 17,000 people in Scotland.

2.3. Country of origin

According to the 2011 census, of the 5,295,403 people registered as resident within Scotland, 4,411,884 (83.3%) were born in Scotland, 514,235 (9.7%) were born elsewhere in the UK, 134,910 (2.5%) were born elsewhere in the EU and 234,374 (4.4%) were born elsewhere in the world.
3. Who Voted Yes?:
- Independence Support in 2014

The 2014 referendum saw the greatest level of engagement of any democratic event in Scotland’s history with an eventual turnout of 84.6% split 55.3% No and 44.7% Yes. Of the 32 council areas only 4 – Dundee City, Glasgow City, North Lanarkshire and West Dunbartonshire – saw majorities for independence. Whilst the four largest and most densely populated cities in Scotland – Aberdeen, Dundee, Edinburgh and Glasgow – were themselves split on independence there was a general correlation through Scotland with greater population density implying a trend towards greater support for independence.

3.1. Population Density

Scotland’s correlation between support for independence and population density suggests a sense of an urban/rural divide in voting intention although the underlying reasons are not entirely clear. Whilst age is certainly a factor (as shall be discussed later) the cross-correlation is not an exact one. It is possible that political party affiliation and the differing abilities of parties to be able to reach different areas of the country plays a role.

3.2. Age

Perhaps the most discussed correlation with independence support has been the age of the voter. The well known “exit poll” conducted by Lord Ashcroft is the largest and most proximate study of voting independence to the referendum itself. In this, the trend is stark.
As the age of the voter tended upwards then the support for independence drops with the 50% support level reached within the 35-44 year bracket.

This trend is supported directly by the correlation between the council area voting results and census data which shows clear trends as a function of the percentage of the area's population which fall within a particular age bracket. For example, if plotted as a function of the percentage of the council area's population aged 16-25, an upward sloping trend of independence support is found.

Deeper analysis of this data finds that the age at which 50% of the population support independence is 41 years old which backs up the findings of the aforementioned Ashcroft polling.

One very significant finding in the Ashcroft polling is the impact of age on turnout.

Whilst the independence referendum fairly successfully mobilised the newly enfranchised 16-17 year old vote, they were very much the outlier on a trend of decreasing voter engagement amongst younger residents compared to older voters.

This – combined with the overall demographics of Scotland – suppressed the number of easily “won” Yes voters who
actually turned out to vote on the day of the referendum.

If this trend continues going forward into a future independence campaign then special effort to “get out the vote” must be made amongst those groups most likely to support independence.

Voters of all ages must be convinced if Scotland is to be an independent country.

\[\text{Voter Age and Turnout}\]

3.3. Gender and Social Grade

Social grade is a classification system originally developed by the National Readership Survey\(^8\) although now widely used in other statistical measurement sectors including polling. The definitions of each grade and the approximate percentage of the population which falls into each grade is shown below.

<table>
<thead>
<tr>
<th>SOCIAL GRADE</th>
<th>VOTES</th>
<th>% OF POPULATION (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Higher managerial, administrative and professional</td>
<td>4</td>
</tr>
<tr>
<td>B</td>
<td>Intermediate managerial, administrative and professional</td>
<td>23</td>
</tr>
<tr>
<td>C1</td>
<td>Supervisory, clerical and junior managerial, administrative and professional</td>
<td>27</td>
</tr>
<tr>
<td>C2</td>
<td>Skilled manual workers</td>
<td>21</td>
</tr>
<tr>
<td>D</td>
<td>Semi-skilled and unskilled manual workers</td>
<td>16</td>
</tr>
<tr>
<td>E</td>
<td>State pensioners, casual and lowest grade workers, unemployed with state benefits only</td>
<td>9</td>
</tr>
</tbody>
</table>

Whilst social grade correlations reasonably well with income it is not an exact substitute. However, very few polls ask questions about income directly and no major poll around the time of the independence referendum did so.

With this in mind, the 2014 Ashcroft poll provided a snapshot of independence support broken down by both social grade and gender.
Here, the trends were less strong than the correlation with age and is likely to be far more influenced by other effects but in the main males were more likely to support independence than females of a similar social grade and the C2DE group were more likely to support independence than the ABC1 group.

3.4. Party Affiliation

As the 2014 independence campaign ended up split very sharply along political party lines it is perhaps no surprise that party affiliation among voters became a strong correlator of independence preference with Ashcroft finding 85% support for independence amongst SNP voters contrasting with 5% support among Conservative voters.
3.5. Country of Origin

As stated in section 1, whilst Scottish residents born in Scotland make up the majority of the population, significant minorities exist of residents and citizens born elsewhere. These voters often displayed a markedly different voting pattern depending on their point of origin. Voters from outside the UK were particularly affected by rhetoric surrounding either the fate of “immigrants” should border arrangements change or by disputes over Scotland’s status within or outwith the EU as a result of independence.

Unfortunately, a longitudinal study of the trends within these groups was not possible as few polling groups consistently broke down their polling by these categories and those which do often break the categories down into “Scotland”, “England” and “Other” which greatly reduces the ability to assess the impact of factors such as the EU referendum. Remarkably given the circumstances, not one major poll has yet been conducted specifically surveying EU citizens resident in Scotland since the EU referendum.

3.6. Income

Few if any major polls published studies of the correlation between independence support and personal income in the run up to or in the immediate wake of the 2014 referendum, as mentioned above social grade studies appear to be preferred but these can be an inexact match.

More recently, some groups – notably BMG – have those polled about their income bracket allowing this correlation such as the following from April 2017.
This polling shows a distinct correlation between support for independence and income where people with an income below the national median wage are significantly more likely to support independent than those with salaries above the median wage (and especially those who pay the upper tax brackets). If a decision is made to attempt to convince members of a particular income bracket then this decision must be weighed not only by their current predilection towards voting a particular way but also how many of them would be available to be convinced as well as what the likelihood is of that campaign depressing the vote within another income bracket or demographic. It would be a poorly run campaign which unsuccessfully attempted to appease a small fraction of upper income earners and did so at the cost of losing the people whose incomes are more similar to the majority of the population and those who stand to gain most by a change in the political landscape of Scotland.

**4. Trending Towards Yes: Support for Independence Since the Referendum**

In addition to the sources used above are the various polls which have been conducted since the 2014 referendum which, whilst consisting of much smaller samples and sometimes involve very small sub-samples do allow a tracking of prevailing trends and give some idea of the changing mood of the Scottish people. However it should be noted that polls taken by different polling organisations may involve different methodologies which limit cross comparisons and occasionally groups may change their methodologies within their own study time line which may affect longitudinal studies. This shall be noted in cases where it may affect particular examples and, as such, any conclusions drawn from them must be regarded as tentative. For this study, data taken from Yougov and Panelbase polls since the independence referendum.

### 4.1. Party Affiliation

If the 2014 referendum was polarised along party affiliations, the shift in Scottish politics appears to have become outright divisive as parties compete even amongst their constitutional allies over how strongly they adhere to one line or another. The intense campaigning by the Conservatives, Liberal Democrats and Labour in particular in the run up to the 2016 Scottish elections served to strip away much of the independence support within their own parties (whether those pro-independence supporters were convinced otherwise or whether they changed party affiliation remains a question for another study).

Since the EU Referendum in June 2016 the trend of independence support amongst the voters of “Unionist” parties has seen a rise which appears to coincide with a rise in independence support amongst EU Remain voters as a whole (although polling data on this particular point is reasonably weak as only a few polls consistently asked about the EU referendum alongside the independence question). This rise in independence support has been coupled with a substantial drop in support for independence within SNP voters which has saw independence support within the party’s voting base drop below 75% in early 2017 though it has generally been
recovering in the time since then and has now returned to levels of support roughly equal to the period immediately after the 2014 referendum. (Note: Few polls consistently ask about independence support within the Greens and other smaller pro-independence parties and where they do, sub samples are often too small to draw firm conclusions).

4.2. Age and Gender

Whilst YouGov has changed internal methodologies regarding age (particularly by changing age brackets measured) which limits the usefulness of the longitudinal studies, Panelbase has been more consistent and has helpfully broken age down by gender as well.

Amongst male voters since the 2014 referendum there have been two consistent trends whereby the younger 16-34 age band has seen independence support rise strongly from just under 50% in the immediate aftermath of the referendum to above 60% in more recent polls. Much of this rise has come in the wake of the EU referendum and closely matches the trends seen within the EU Remain voting group. The contrary trend is seen within the male 35-54 age group although this is marked more by a steady decline since the referendum rather than a particular “Brexit” shock. Support of independence amongst the 55 Plus group remained largely unchanged until the spring of 2017 and has dropped significantly since then.
The previous version of this report highlighted the Female age demographics as something worthy of particular attention for focus groups or others seeking to understand why people vote as they do. Amongst younger females, support for independence continues to trend upwards at a rate roughly similar to their male counter-parts. Older females are beginning to show evidence of much less change in their views than males of a similar age group. Support for independence amongst older females dropped precipitously following the EU referendum – from 37% to just 22% - but despite fears that the increasing uncertainty caused by the prospect of an unplanned Brexit and the collapse of stability in UK governance following the 2017 General Election, this demographic has, if anything, stabilised support for independence. Whilst still below pre-EU referendum levels, support appears to have reached its floor from which a campaign could begin to rebuild.

### 4.3. Country of Origin

As stated in section 3, few studies have been conducted looking specifically at the voting intention of non-UK, EU citizens or Scottish residents from outside the UK. The studies which do exist tend to separate their samples into voters born in Scotland, England and Elsewhere. The support for independence from Scottish-born Scots has been eroding steadily in the last four years. Where once it was over 50% of that population now, it is barely above 40%. Amongst English-born Scottish residents, support for independence has remained as low as it was in 2014 – ranging between 20% and 30% in the intervening period.

For those born outside of Scotland and England, Brexit appears to have been a decisive and paradigm-shifting moment with support launching upwards immediately after Brexit to above 50% where it has remained since. Only around one third of this population are EU citizens so a key target of more detailed study could be to look at how support for independence has changed between EU and non-EU residents in Scotland (few, if any, polls have anything like the granularity to be able to examine this from their datasets). Given a general rise in anti-immigrant sentiment in the UK since the Brexit referendum as well as scandals such as that experienced by the "Windrush Generation", it would not be beyond the realms of possibility that non-EU citizens will have been feeling as disenfranchised by the UK Government as have EU citizens and may be looking at Scottish independence as an opportunity for change.

### 4.4. Social Grade

If the social grade issue was not particularly strong at the time of the independence referendum, then it has become one now.
The C2DE group has seen a steady and consistent erosion of Yes support since the date of the referendum though has recently shown some signs of an upturn. Any decline in this social group should be considered serious cause for concern if it continues as it speaks of the independence movement failing to hold on to the voters it managed to newly engage in the previous campaign. The effect of the EU referendum has had its impact as well as C2DE have been shown to be the group most in favour of leaving the EU and therefore are the most likely to be disincentivised by a future independence campaign strongly linked to EU membership.

The ABC1 group is appears to be shying away from independence support at a faster rate than their lower income counterparts. The brief “bounce” observed around the time of the EU referendum appears to have been short-lived with any major concerns about leaving the EU quickly being subsumed by other matters. A future independence campaign that was forced to spend limited campaign resources on just one of these social grade blocks may have to make a decision between pushing against the tide of a declining group or bolstering support amongst a rising but uncertain group.

5. Who to Convince

In May 2018, the Scottish Government signalled intention to expand the Scottish voting franchise to everyone resident in Scotland and aged 16 and over. This is a welcome decision and ensures that no-one will have their democratic rights stripped away from them as a result of Brexit. This also simplifies matters when thinking about a hypothetical future referendum as it allows one to consider all potential voters in Scotland rather than trying to determine if they are eligible to vote or not.

If an independence referendum were conducted today with an 85% overall turnout, a 45%/55% Yes/No split and the overall demographics laid out in the recent polls then the results would look approximately as the table below.
HYPOTHETICAL SECOND INDEPENDENCE REFERENDUM

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>VOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Voter Population</td>
<td>4,507,358</td>
</tr>
<tr>
<td>Votes Cast (85% Turnout)</td>
<td>3,831,254</td>
</tr>
<tr>
<td>Yes Votes (45%)</td>
<td>1,724,064</td>
</tr>
<tr>
<td>No Votes (55%)</td>
<td>2,107,190</td>
</tr>
<tr>
<td>Vote Gap</td>
<td>383,125</td>
</tr>
<tr>
<td>Votes Not Cast</td>
<td>676,104</td>
</tr>
</tbody>
</table>

In this scenario there is a vote gap between Yes and No of a little over 380,000 and a number of potential votes not cast of a little over 676,000. Calculating the number of votes required to reach any particular result (say, 60% Yes) is somewhat complicated as adding an uncast vote (i.e. convincing someone already convinced to turn out and vote) will decrease the vote gap by one vote whereas convincing someone who had intended to vote No to instead vote Yes will reduce the tax gap by two votes (The Yes vote increases by one but the No vote also decreases by one).

Some attempts can be made explore a few scenarios of adjusting the prospective Yes vote within some of the demographic categories outlined in this report which may help the independence campaign close and reverse that gap. It should be further noted that individual voters may well fall into multiple categories (for example, a 23 year old, female, C2 grade, EU migrant) so that simple addition of all of the scenarios below may not result in the a closure of the gap. Indeed, it may be that a strategy which attracts a voter due them belonging to one category may well discourage them due to them belonging to another. This said, few scenarios explored here are mutually exclusive. A multi-strategy campaign is more than possible.

5.1. “Get Out The Vote”

Whilst the young were and continue to be more supportive of independence than their older peers, it remains true that voter turnout amongst the young is often much lower than the national average. A motivated and driven independence campaign, powered by a message of hope for the future could be empowered to engage with younger voters – who may well be voting for the first time – and to drive up turnout.

A “Get Out The Vote” campaign focused on identifying younger pro-independence voters and encouraging them to register and, when the time comes, to vote could substantially affect the overall results. An additional turnout of 10% in each age bracket between 16 and 24 would be worth an additional 72,000 votes for the independence campaign and would close the “vote gap” by around 18%. Increasing voter turnout to the national average of 85% would result in additional 133,000 votes for independence and would reduce the gap by 34%.
It should go without saying that this simple example neglects the obvious feedback effect of having a dynamic and well-motivated campaign. Those newly engaged voters who are brought in can themselves convince and engage with others. It has been remarked that the 2016 US Presidential campaign by the Democrats relied heavily on “banked” votes by former Bernie Sanders supporters naturally staying with the party to support the much less radical and engaging campaign run by Hillary Clinton. Whilst this was, to a great degree, true – few Sanders supporters would have countenanced voting for Donald Trump – those supporters who would have actively campaigned for Sanders and would have dragged friends and family members to the ballot box for his campaign merely gritted their teeth and voted for Clinton. This played a substantial role in her losing to the populist campaign of Donald Trump.

5.2. “Convince the Elders”

On the opposite end of the age range, the Yes campaign could look at those who are more certain to turn out but less likely to support independence. A campaign designed to swing the vote among the over 55 population may leverage the demographic patterns within Scotland at present.

In this scenario, the voting preference amongst those aged 55 and over is increased by 10 points (such that the 55-64 group approaches the overall average). This would result in the over 172,000 fewer No votes and an equivalent rise in the number of Yes votes. This would almost eliminate the voting gap and bring the hypothetical result to within 40,000 votes of the independence campaign winning. Clearly there would be dividends to be won in a campaign based on convincing those who voted for No and for reassuring those older “soft-No’s” who didn’t necessarily believe in the No message but were sufficiently unconvinced by the Yes campaign or were sufficiently concerned about questions over currency, savings, pensions and the NHS to vote No defensively.

Certainly a campaign based around the principles of ensuring the security of the NHS and the state pension (or reforming it into a Universal Basic Income) is eminently possible in the environment of an explicitly anti-Austerity campaign working against the background of UK social security cuts and unpopular and unjust policies such as the state pension age raises affecting groups like the WASPI women.

5.3. “Convince the Better Off”

One possible campaign could be to attempt to convince those on higher incomes to support independence. If a campaign centred on promises deemed attractive to those paying the higher income tax rate and above were employed then it could be imagined that it moved their projected voting preference from the current 34% up to the current average of 45%.
However, as stated, only approximately 15% of the total working population fall into this income bracket so that the Vote Gap would reduce by less than 120,000. A campaign based on convincing only those 1% of residents who pay the additional rate tax would have a negligible effect on the results. The likelihood is that there are simply not enough people in Scotland who earn enough to pay the upper rates of income tax who are not currently amenable to voting for independence but may be persuadable. Even if there are, the chances are that a campaign designed to swing these voters (perhaps by offering tax cuts) would alienate lower income voters in such numbers that the referendum would still be unwinnable.

A campaign aimed instead at raising pro-independence sentiment among the £25,000 to £44,999 bracket would impact around 27% of the working population. A swing which increased the Yes vote from 36% to 45% would result in around 92,300 votes moving from No to Yes and therefore a closing of the vote gap by around 182,600.
Finally, a campaign which specifically targeted those on lower than the median income would be one which targeted, by definition, half of all voters.

If this campaign swung just 5% of those who earn less than the median wage from No to Yes and if it attracted an equivalent number of non-voters to vote for Yes then the result would be a gap swing of around 400,000 votes which would be enough to swing the overall result from No to Yes.

Clearly, whilst no inclusive campaign should ever entirely write off any particular segment of voters, a campaign which targeted voters based on income would have to deal with the comparatively high level of income inequality experienced by the UK. A campaign based on capturing the votes of high earners can only ever target a limited pool of voters (many of whom are strongly disinclined towards independence in the first instance). It may be that a campaign based either on improving the incomes of those who have the least or a campaign not so focused on income in the first place may result in one better able to convince more voters and therefore better able to achieve its goal of independence.

5.4. “Scotland: A Place to Live”

One of the most dramatic shifts in opinion uncovered by the longitudinal data has been the turn-around amongst non-UK citizens. During the 2014 campaign, the overwhelming feeling was that Scottish independence endangered Scotland’s membership of the European Union and put the residency status of non-UK citizens either at risk or at least made it uncertain. Since then, the UK has experienced the EU referendum, the rise of anti-immigrant sentiment in the UK (especially in England), the populist politics that has followed such sentiment as well as notable scandals such as the “hostile environment” policies of the UK government and its affect on the Windrush Generation. Almost two years after the EU referendum and with time rapidly running out on exit negotiations, the residency status of EU citizens post-Brexit is still far from secure. The prospect that an independent Scotland would have a much more positive relationship with the European Union and a more positive relationship with immigrants and immigration policy has likely helped to convince such voters that their future is more secure in an independent Scotland than in a Scotland within the UK. The Scottish Government has long held on to a pro-EU stance though their recent rhetoric (particularly around keystone issues such as the Common Fisheries Policy) have somewhat muted that sentiment. The fact that a substantial number of SNP voters either voted Leave in 2016 or have misgivings about the EU may mean that that party could have difficulty mustering for a campaign which was based on an explicitly pro-EU stance. Indeed, the number of voters who have shifted from No to Yes based on the issue of the EU appears to have been roughly balanced by the number of voters who have shifted from Yes to No based on the same issue. This should serve to highlight that no voter can be taken for granted in any campaign.
6. Conclusions

This study of the trends since 2014 show that the campaign which convinced 45% of the Scottish population to vote for independence then may not be suitable for a second campaign taking place under “materially changed” circumstances. In particular, the very substantial drop in independence support anti-EU voters countered by the rise in support pro-EU groups speaks to the conclusion that an independence campaign based on the political policies of any one party would be highly unlikely to succeed. Instead, a more inclusive and less prescriptive campaign which opens the possibility for a new political path for any party to debate may be more attractive.

The longitudinal trend in gender and social grades must also be looked at in extreme detail. Whilst the EU referendum is highly likely to be the catalyst for the second independence referendum it may be that a campaign based solely on this issue would be difficult to navigate and subject to ever shifting externalities as the UK-EU negotiations develop and progress.

It appears that no single campaign strategy will be sufficient to win the next referendum should we enter it in a position similar to that where we are today but this report has served to highlight several areas in which votes may be won or recovered. It will up to the ongoing campaign to tailor their messages as they see fit to best impact the overall debate but it is clear that a multi-strategy, multi-party campaign is vital so that various segments can target their particular strengths without feeling too hindered by the diversity of the campaign and without trying to corral said campaign into their vision.
7. References
