



What people think,  
feel and do



Ten Years On

The Scottish Independence Referendum



Opinium Insights Report

18 September 2024



## OPINIUM RESEARCH

58 Great Sutton St  
London, EC1V 0DG  
T +44 (0)20 7566 3190  
helloUK@opinium.com



MRS™ Awards 2021  
Winner  
Agency of the Year

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## About the research

To mark the 10th anniversary of Scotland's independence referendum, Opinium conducted a wide-ranging, nationally representative survey across Scotland exclusively for The Sunday Times.

Our research, undertaken only a few weeks before the anniversary in September 2024, reveals a tightening of likely voting intentions on Scottish independence, with the 'No' side holding a slender 2-point lead over the 'Yes' side. This headline figure will concern Unionists, even as the constitutional question falls down the priority list for many Scots on both sides of the divide.

The survey also explores behind the scenes—under the bonnet, if you will—of the headline 'IndyRef' voting intention. In an ideal scenario, we find that Scots generally prefer to remain in the Union by a wider margin of 10 points, with 'devo max' being the least divisive outcome to the question of Scotland's future relationship with the rest of the UK, even if what that looks like in practice remains unclear.

With this difference in mind, we explore what is driving the arguments from both sides, in favour of and against independence. While Nationalists argue for taking back control, Unionists caution against uncertainty. This helps us understand why the arguments of the No camp might not be maximising the potential of the Unionist vote, when many of the issues voters are uncertain about are also ones they ultimately think will be resolvable.

Our research suggests that Unionists in Scotland should reflect on whether arguments based on uncertainty will hold in the long term and develop a positive vision for an empowered Scotland within the United Kingdom.

**James Crouch**, Head of Policy & Public Affairs Research  
**Kai Hain**, Political and Social Researcher

*Opinium conducted a nationally representative survey amongst 1,028 Scots aged 16+, between the 5th and 11th September 2024.*

Read the write up in *The Sunday Times*

[Sunday Times article](#)

Read analysis from Opinium's James Crouch in *The Times*

[Times Op-ed](#)

See the full data tables

[Opinium data tables](#)

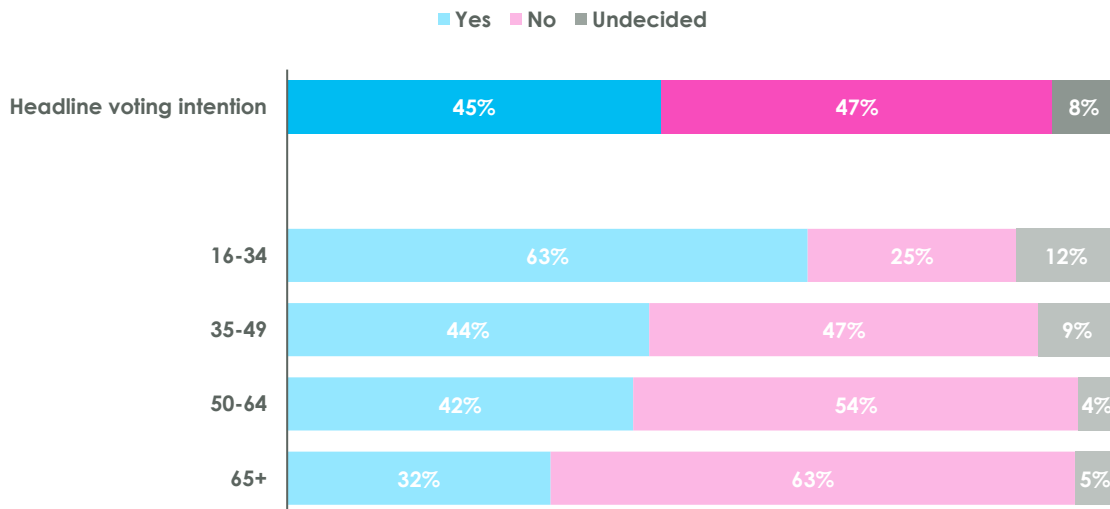
## State of play

### Scots almost evenly divided on independence

If there were a second referendum tomorrow on Scottish independence, with the ballot paper once again asking “Should Scotland be an independent country?”, 47% of Scots would vote “no” and 45% would vote “yes.” Almost one in ten (8%) of those who might vote in a second referendum are currently undecided. In the 2014 referendum, 44.7% voted ‘yes’, and 55.3% voted ‘no’.

Younger voters are more likely to want independence, with 63% of 16- to 34-year-olds saying they would choose ‘yes’, while the same proportion (63%) of over 65s would say ‘no’.

**Headline IndyRef 2 voting intention by age**



Q: If there were a second referendum tomorrow on Scottish independence, and the ballot paper asked the question: “Should Scotland be an independent country?” How would you vote?

Base: All those who might vote in a second independence referendum (961)

## Independence falling down the priority list?

Despite how divided Scotland appears on independence, it is only a priority for less than a tenth of likely Scottish voters.

For Scots who are likely to vote in the 2026 Holyrood election, only 8% are most likely to base their vote on devolution and independence than any other issue, making it the fourth most important priority behind health (25%), the economy (18%), and immigration (11%).

Even for current Yes voters, the question of devolution and independence (12%) is a lower driver for how they will cast their vote than health (19%) or the economy (17%).

The top eight issues that likely Scottish voters are most likely to base their vote on are as follows:

| KEY DRIVERS OF VOTE CHOICE AT NEXT HOLYROOD ELECTION | ALL SCOTS | CURRENT YES VOTERS | CURRENT NO VOTERS |
|--|-----------|--------------------|-------------------|
| Health / NHS   | 25%       | 19%                | 31%               |
| Economy  | 18%       | 17%                | 21%               |
| Immigration  | 11%       | 11%                | 11%               |
| Devolution and independence                          | 8%        | 12%                | 5%                |
| Public services / benefits                           | 5%        | 5%                 | 6%                |
| Housing / house prices                               | 5%        | 6%                 | 3%                |
| Environmental issues                                 | 3%        | 5%                 | 1%                |
| Education  | 3%        | 3%                 | 4%                |

Q: Which of the following issues are you most likely to base your vote on in the next Scottish Parliament election? Please select one option.

Base: All those who might vote in the 2026 Scottish Parliament elections (933)

## Under the bonnet

### Greater devolution is the greatest uniting factor

To better understand the electoral landscape, we asked Scots what their preferred relationship would be for Scotland to the rest of the United Kingdom, and then tested how acceptable or unacceptable each of their non-preferred outcomes were to ascertain the balance of opinion outside of the specific question posed on the ballot paper in 2014.

In an ideal scenario, we found half (50%) of Scots preferred the idea of Scotland staying inside the United Kingdom. However, Unionists are divided on precisely what that would look like. A quarter (24%) would prefer Scotland to remain in the UK with the current devolution settlement, and another quarter (26%) would prefer more devolved powers from the UK government.

By comparison, two in five (40%) would prefer Scotland to be fully independent of the UK. A third (32%) of Scots would prefer Scotland to become independent but maintain a close relationship with the UK, whilst only a tenth (9%) would prefer independence and for Scotland to have a distant relationship to the UK.

When asked about alternatives to their preferred choice, however, remaining in the UK with more devolved powers is preferred or acceptable to two thirds of Scots (64%), whilst remain with the current devolution settlement, or independence with a close relationship with the UK are both still preferred or acceptable to a majority of Scots (both 56%)

| HOW DO YOU FEEL ABOUT EACH POTENTIAL SCOTTISH-UK RELATIONSHIP?                          | PREFERRED       | ACCEPTABLE | NET: PREFERRED OR ACCEPTABLE | UNACCEPTABLE |
|---|-----------------|------------|------------------------------|--------------|
| <b>Unionist scenarios</b>   | <b>NET: 50%</b> |            |                              |              |
| Scotland remains within the UK and receives more devolved powers from the UK Government | 26%             | 39%        | 64%                          | 28%          |
| Scotland remains within the UK and with the current devolution settlement               | 24%             | 31%        | 56%                          | 34%          |
| <b>Nationalist scenarios</b>  | <b>NET: 40%</b> |            |                              |              |
| Scotland becomes a fully independent country with a close relationship to the UK        | 32%             | 24%        | 56%                          | 38%          |
| Scotland becomes a fully independent country with a distant relationship to the UK      | 9%              | 29%        | 38%                          | 54%          |

Q: What would be your most preferred relationship between Scotland and the rest of the United Kingdom?

Q: How acceptable would you find each of the following potential relationships between Scotland and the rest of the United Kingdom?

Base: All Scots (1,028)

## The arguments

### Taking back control: the Nationalist case

Amongst Scots, the most popular reasons for why Scotland should be independent are a combination of political arguments, such as the case for full sovereignty and to rejoin the EU, and economic arguments, for Scotland to control all its own natural resources, and the belief that independence will strengthen the Scottish economy.

What's also notable is that the case for independence is not strongly routed in historical reasoning. Less than a tenth (7%) cited Scotland's history with the UK as a reason for independence.

| BEST ARGUMENTS IN FAVOUR OF AN INDEPENDENT SCOTLAND                           | ALL SCOTS | CURRENT YES VOTERS | CURRENT NO VOTERS |
|---|-----------|--------------------|-------------------|
| Because decisions that affect Scotland should only be made by Scotland        | 31%       | 52%                | 14%               |
| To have full control over Scotland's natural resources                        | 28%       | 44%                | 15%               |
| To strengthen Scotland's economy  | 27%       | 45%                | 11%               |
| To rejoin the EU  | 21%       | 31%                | 12%               |
| Because Scotland has different values to the rest of the UK                   | 17%       | 29%                | 8%                |
| To have more progressive and redistributive policies                          | 11%       | 18%                | 6%                |
| The performance of the Labour and the Conservative governments in Westminster | 10%       | 17%                | 5%                |
| To improve Scotland's environmental and climate issues                        | 8%        | 11%                | 5%                |
| Scotland's history with the rest of the UK                                    | 7%        | 11%                | 3%                |
| The performance of the SNP government in Holyrood                             | 2%        | 4%                 | 1%                |

Q: Which of the following, if any, do you think are the main reasons why Scotland should be an independent country? Please select up to three reasons.

NB: Answer options were developed from open text response received in a pre-study conducted by Opinium.

Base: All Scots (1,028)

## Certainty and security: the Unionist case

The strongest arguments against independence, however, are more focussed on uncertainty, over the constitution of an independent Scotland, as well as its economic security, currency options and difficulties of having a border with England.

Whilst around one in six (17%) say Scotland's different values to the rest of the UK is a reason for independence, almost a fifth (19%) think Scotland's shared values with the rest of the UK is a reason

| BEST ARGUMENTS IN FAVOUR OF SCOTLAND STAYING IN THE UNION                     | ALL SCOTS | CURRENT YES VOTERS | CURRENT NO VOTERS |
|---|-----------|--------------------|-------------------|
| The uncertainty of how an independent Scotland would look                     | 28%       | 18%                | 40%               |
| The threat of independence to Scotland's economic security                    | 26%       | 12%                | 43%               |
| To keep the pound sterling  | 23%       | 19%                | 28%               |
| The potential difficulties of having a regulated border with England          | 21%       | 18%                | 27%               |
| The shared values and identity between Scotland and the rest of the UK        | 19%       | 10%                | 30%               |
| To keep the UK's shared institutions  | 17%       | 13%                | 23%               |
| The performance of the SNP government in Holyrood                             | 17%       | 8%                 | 28%               |
| Scotland's history with the rest of the UK                                    | 13%       | 11%                | 15%               |
| To keep the Monarchy  | 11%       | 6%                 | 14%               |
| The performance of the Labour and the Conservative governments in Westminster | 2%        | 4%                 | 1%                |

Q: Which of the following, if any, do you think are the main reasons why Scotland should stay in the United Kingdom? Please select up to three reasons..

NB: Answer options were developed from open text response received in a pre-study conducted by Opinium.

Base: All Scots (1,028)



## What if?

### The negative impacts of independence

Scots expect there to be a negative impact from independence in several policy areas, with relatively few competing positives.

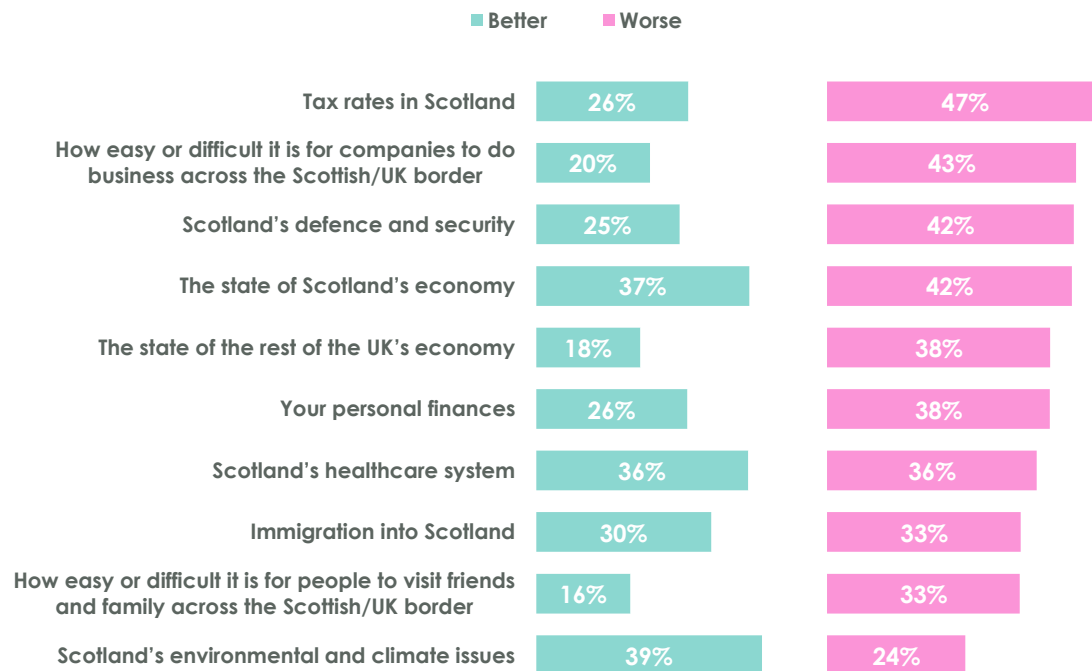
The biggest concern for Scots about becoming independent is Scotland's tax rates, with almost half (47%) thinking they would worsen under independence. Many also think Scotland's defence and security would worsen as a result of leaving the UK (43% vs 20% better).

Scotland's border with the UK is another concern for many Scots regarding independence. Over two-fifths (43%) think the ease of business across the UK border will worsen (vs 25% better), while a third (33%) also think it will be harder to see family and friends across the border (vs 16% better).

Scots are also divided on how independence would affect Scotland's economy overall (42% worse vs 37% better), but more are concerned about its effect on their personal finances (38% worse vs 26% better), reflecting the wider concern around tax. Despite this, many more Scots still think the rest of the UK's economy would be worse off after independence (38% worse vs 18% better).

The only major policy area where a plurality of Scots think independence would bring a benefit is environmental and climate issues, which are perceived as the biggest potential advantage of independence (39% better vs 24% worse)

#### How would the following change under independence?



Q: If Scotland became an independent country, would you expect the following to get better or worse, if at all?

Base: All Scots (1,028)

## Are the 'what ifs' becoming less uncertain?

There are a lot of question marks of what an independent Scotland might look like. However, one challenge for the Unionist cause is that many of these are viewed as likely to be resolvable in the actual event by many (except for the future of the monarchy). Taken in combination with the current voting intention on independence being much narrower than the 'preferred outcomes', this suggests the No camp might need to find a more positive case for Union in future.

### Currency

**Preference if Scotland voted for independence:** Almost three in five (58%) would want to keep the pound sterling as Scotland's currency, whilst only 14% would want Scotland to join the Euro. Only one in ten (11%) would want an independent Scotland to establish its own currency.

**Expected outcome:** Just over half (52%) think it is likely that an independent Scotland would keep the pound sterling as its currency, while 32% think it is unlikely. Over half (56%) think it unlikely Scotland would get its own currency and 48% think it is unlikely they would join the Euro.

### European Union

**Preference if Scotland voted for independence:** Over half of Scots (56%) would want an independent Scotland to rejoin the EU, with only a quarter (26%) thinking a fully independent Scotland should remain outside the EU.

**Expected outcome:** Almost three in five (57%) think it is likely that an independent Scotland would rejoin the European Union as a member, while only one in four (27%) think it is unlikely.

### Border

**Preference if Scotland voted for independence:** Three quarters (75%) also think that an independent Scotland should have an open border with England, with a deal on trade customs, compared to only a tenth (11%) who would actively want some form of regulated border with England.

**Expected outcome:** Currently a third (35%) think some sort of regulated border with England would be likely, where regulations on movement of people and trade are imposed. However, 46% think this would be unlikely.

### Monarchy

**Preference if Scotland voted for independence:** Scots are heavily divided on whether an independent Scotland should keep the monarchy. Just over a third (35%) would want Scotland to remain as a monarchy, whilst two fifths (39%) would want Scotland to become a republic, and a quarter (26%) are undecided.

**Expected outcome:** As with their preference, Scots are unclear on their expectations about the likely future of the monarchy. While just over two in five (42%) think Scotland would be likely to become a republic under independence, 37% think that the abolition of the monarchy would be unlikely.

# About Opinium

**OPINIUM** is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

[www.opinium.com](http://www.opinium.com) | [research@opinium.com](mailto:research@opinium.com) | 0207 566 3190