

# Scotland Poll

04/09/2018

Prepared on behalf of the Scotch Whisky Association



# Methodology

## Fieldwork Dates

29<sup>th</sup> August – 3<sup>rd</sup> September 2018

## Data Collection Method

The survey was conducted via online panel. Invitations to complete surveys were sent out to members of the panel. Differential response rates from different demographic groups were taken into account.

## Population Sampled

For Q5, Q6, Q9, Q10 and Q11 all residents aged 16+ in Scotland. For all other questions all residents aged 18+ in Scotland

## Sample Size

16+ sample – 1,060  
18+ sample – 1,040

## Data Weighting

Where questions were asked to those aged 16+ data were weighted to the profile of all adults aged 16+ living in Scotland and for questions asked to those aged 18+ data were weighted to the profile of all adults aged 18+ living in Scotland. Data were weighted by age, sex, region, 2017 general election vote and 2014 independence referendum vote. Targets for the weighted data were derived from Office for National Statistics 2011 Census data, and the results of the 2017 General Election and 2014 Independence Referendum.

## Margin of Error

Because only a sample of the full population was interviewed, all results are subject to margin of error, meaning that not all differences are statistically significant. For example, in a question where 50% (the worst case scenario as far as margin of error is concerned) gave a particular answer, with a sample of 1,040 it is 95% certain that the ‘true’ value will fall within the range of 3.0% from the sample result. For a sample of 1,060 this would be 2.9%. Subsamples from the cross-breaks will be subject to higher margin of error, conclusions drawn from cross breaks with very small sub-samples should be treated with caution.

## Voting Intention

In order to assess voting intention, we first asked respondents how likely they would be to vote in the next election on a scale of 0–10. This likelihood to vote for was then used to weight voters' responses, such that respondents replying “10” were weighted by a factor of 1.0, whilst those responding “9” were weighted by a factor of 0.9, and so on down to responses of “0” being excluded altogether.

Respondents were then asked who they would be most likely to vote for if that election were tomorrow, with the responses “Labour”, “Conservative”, “Liberal Democrat” and “SNP” prompted in a randomising order, and other parties displayed if respondents selected “Another Party”. When asked who they would be most likely to vote for with their regional list vote, the responses “Scottish Green Party” and “UKIP” were also prompted in a randomising order. These responses were not prompted for other questions about voting intention. As an additional weighting step, respondents who replied “undecided” and “refused” were then removed from the sample.

## Question presentation

All data tables shown in full below, in order and wording put to respondents, including but not limited to all tables relating to published data and all relevant tables preceding them. Tables for demographic questions might not be included but these should be clear from the cross-breaks on published tables. In all questions where the responses are a list of parties, names or statements, these will typically have been displayed to respondents in a randomising order. The only questions which would not have had randomising responses would be those in which there was a natural order to maintain – e.g. a scale from “strongly agree” to “strongly disagree”, a list of numbers from 0 to 10 or questions which had factual rather than opinion-related answers such as demographic information. “Other”, “Don't know” and “Refused” responses are not randomised.

Not all questions will have necessarily been asked to all respondents – this is because they may be follow-on questions from previous questions or only appropriate to certain demographic groups. Lower response counts should make clear where this has occurred.

Data were analysed and weighted by Survation.

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Table 1

Q25. By Normal Weighting

Q25. Which of the following statements is closest to your view?

Base: Respondents with 18+ age

	Total	Sex		Age			ScotRegion							
		Male	Female	18-34	35-54	55+	Central Scotland	Glasgow	Highlands and Islands	Lothian	Mid Scotland and Fife	North East Scotland	South Scotland	West Scotland
Unweighted Total	1040	449	591	297	387	356	136	199	71	157	123	133	69	152
Weighted Total	1040	500	540	289	345	407	155	121	77	171	128	145	96	147
The UK government should do more to support the Scotch whisky industry	591	297	293	140	207	244	95	68	44	83	66	84	62	89
	57%	60%	54%	49%	60%	60%	61%	56%	57%	49%	52%	58%	65%	61%
The UK government is doing enough to support the Scotch whisky industry	394	179	215	121	117	156	50	46	32	77	60	53	27	49
	38%	36%	40%	42%	34%	38%	33%	38%	41%	45%	47%	36%	28%	33%
The UK government should do less to support the Scotch whisky industry	56	24	32	28	21	7	10	7	2	11	2	8	7	9
	5%	5%	6%	10%	6%	2%	6%	6%	2%	6%	1%	6%	8%	6%
SIGMA	1040	500	540	289	345	407	155	121	77	171	128	145	96	147
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

## Scotland Poll

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Table 2

Q25. By Normal Weighting

Q25. Which of the following statements is closest to your view?

Base: Respondents with 18+ age

	Total	2017 GE Vote						GE Voting Intention						2014 Referendum Vote		
		CON	LAB	LD	SNP	Other	Did not vote	CON	LAB	LD	SNP	Other	Undecided	Yes	No	Can't remember
Unweighted Total	1040	232	198	56	320	12	141	201	194	63	340	30	151	413	458	14
Weighted Total	1040	232	220	55	299	12	141	206	208	63	327	32	147	389	482	14
The UK government should do more to support the Scotch whisky industry	591	96	126	29	227	4	69	79	114	34	245	17	71	265	247	9
	57%	41%	57%	52%	76%	29%	49%	38%	55%	55%	75%	52%	48%	68%	51%	62%
The UK government is doing enough to support the Scotch whisky industry	394	126	86	24	58	8	58	120	76	27	67	14	66	96	219	4
	38%	55%	39%	43%	19%	71%	41%	58%	37%	43%	21%	45%	45%	25%	46%	31%
The UK government should do less to support the Scotch whisky industry	56	10	8	3	15	0	14	7	18	1	14	1	10	28	16	1
	5%	4%	4%	5%	5%	-	10%	3%	8%	2%	4%	4%	7%	7%	3%	7%
SIGMA	1040	232	220	55	299	12	141	206	208	63	327	32	147	389	482	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

## Scotland Poll

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Table 3

Q36. By Normal Weighting

Q36. Spirits, including Scotch Whisky, are taxed 76% higher in the UK than the EU average. To what extent do you agree or disagree with the following statement?

"As our trading relationship with EU countries change as we leave the European Union, tax on Scotch Whisky in the UK should be at least as competitive as the EU average?"

Base: Respondents with 18+ age

	Total	Sex		Age			ScotRegion							
		Male	Female	18-34	35-54	55+	Central Scotland	Glasgow	Highlands and Islands	Lothian	Mid Scotland and Fife	North East Scotland	South Scotland	West Scotland
Unweighted Total	1040	449	591	297	387	356	136	199	71	157	123	133	69	152
Weighted Total	1040	500	540	289	345	407	155	121	77	171	128	145	96	147
Strongly agree	391	202	189	87	126	179	63	42	32	49	44	57	41	63
	38%	40%	35%	30%	37%	44%	41%	35%	42%	29%	35%	39%	42%	43%
Somewhat agree	351	168	183	107	107	136	43	44	22	70	42	52	27	51
	34%	34%	34%	37%	31%	34%	28%	36%	28%	41%	33%	36%	28%	35%
Neither agree nor disagree	180	81	99	55	75	50	31	23	13	33	19	23	17	23
	17%	16%	18%	19%	22%	12%	20%	19%	17%	19%	15%	16%	17%	16%
Somewhat disagree	26	13	13	7	7	12	6	4	4	4	5	1	2	1
	3%	3%	3%	3%	2%	3%	4%	3%	6%	2%	4%	1%	2%	1%
Strongly disagree	18	18	1	5	1	13	1	1	1	2	4	1	5	2
	2%	4%	0%	2%	0%	3%	1%	1%	2%	1%	3%	1%	5%	1%
Don't know	73	18	55	27	29	17	10	8	4	13	14	11	6	7
	7%	4%	10%	10%	8%	4%	7%	7%	6%	8%	11%	8%	6%	5%
SIGMA	1040	500	540	289	345	407	155	121	77	171	128	145	96	147
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

## Scotland Poll

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Table 4

Q36. By Normal Weighting

Q36. Spirits, including Scotch Whisky, are taxed 76% higher in the UK than the EU average. To what extent do you agree or disagree with the following statement?

"As our trading relationship with EU countries change as we leave the European Union, tax on Scotch Whisky in the UK should be at least as competitive as the EU average?"

Base: Respondents with 18+ age

	Total	2017 GE Vote						GE Voting Intention						2014 Referendum Vote		
		CON	LAB	LD	SNP	Other	Did not vote	CON	LAB	LD	SNP	Other	Undecided	Yes	No	Can't remember
Unweighted Total	1040	232	198	56	320	12	141	201	194	63	340	30	151	413	458	14
Weighted Total	1040	232	220	55	299	12	141	206	208	63	327	32	147	389	482	14
Strongly agree	391	81	91	20	135	4	45	72	83	27	134	14	45	171	175	3
	38%	35%	41%	37%	45%	36%	32%	35%	40%	43%	41%	45%	31%	44%	36%	18%
Somewhat agree	351	85	75	21	104	5	41	81	69	18	121	9	41	124	171	6
	34%	37%	34%	38%	35%	43%	29%	39%	33%	28%	37%	28%	28%	32%	36%	42%
Neither agree nor disagree	180	46	32	7	40	0	32	42	35	9	45	7	30	58	86	5
	17%	20%	15%	12%	13%	-	23%	20%	17%	14%	14%	22%	20%	15%	18%	35%
Somewhat disagree	26	5	3	6	6	2	2	4	5	6	6	0	3	8	15	1
	3%	2%	2%	11%	2%	16%	2%	2%	3%	9%	2%	-	2%	2%	3%	6%
Strongly disagree	18	9	3	1	2	0	3	4	4	4	6	0	0	10	5	0
	2%	4%	2%	3%	1%	-	2%	2%	2%	6%	2%	-	-	3%	1%	-
Don't know	73	7	15	0	12	1	19	3	11	0	16	2	28	19	29	0
	7%	3%	7%	-	4%	6%	13%	2%	5%	-	5%	6%	19%	5%	6%	-
SIGMA	1040	232	220	55	299	12	141	206	208	63	327	32	147	389	482	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

## Scotland Poll

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### **Full list of questions included in poll**

Questions
Q1. If there was a UK General Election for the Westminster Parliament tomorrow, on a scale of 0-10, where 10 is will definitely vote and 0 is definitely won't vote, how likely would you be to vote in the General Election?
Q2. If there was a General Election for the Westminster Parliament taking place tomorrow, and there was a candidate from all political parties standing in your constituency, which party do you think you would vote for?
Q2. If there was a General Election for the Westminster Parliament taking place tomorrow, and there was a candidate from all political parties standing in your constituency, which party do you think you would vote for?
Q2. If there was a General Election for the Westminster Parliament taking place tomorrow, and there was a candidate from all political parties standing in your constituency, which party do you think you would vote for?
Q3. In the Westminster Election of 2017, 66% of people in Scotland voted, while 34% of people in Scotland did not vote. Thinking back to the Westminster Election in June 2017, can you remember whether or not you voted in that specific election?
Q4. Thinking back to the Westminster Election in June 2017, can you recall which party you voted for in that election?
Q5. If there was a referendum on Scottish Independence taking place tomorrow, how likely do you think you would be to vote on a scale of 0 to 10?
Q6. If there was a referendum tomorrow with the question "Should Scotland be an Independent country?", how would you vote?
Q6. If there was a referendum tomorrow with the question "Should Scotland be an Independent country?", how would you vote?
Q6. If there was a referendum tomorrow with the question "Should Scotland be an Independent country?", how would you vote?
Q7. In the Scottish independence referendum in September, 85% of Scottish adults voted and 15% did not vote. Did you or did you not vote in the Scottish independence referendum on 18 September 2014?
Q8. How did you vote in the Scottish independence referendum?
Q9. If there was to be an election for the Scottish Parliament tomorrow, on a scale of 0-10, where 10 is definitely would vote and 0 is definitely wouldn't vote, how likely would you be to vote in those elections?
Q10. In the next Scottish Parliament election you will be given two votes. Your first vote will be for a single person to represent your constituency in the Scottish Parliament. If the election were tomorrow, which party would you be most likely to vote for with your first, constituency vote?
Q10. In the next Scottish Parliament election you will be given two votes. Your first vote will be for a single person to represent your constituency in the Scottish Parliament. If the election were tomorrow, which party would you be most likely to vote for with your first, constituency vote?
Q10. In the next Scottish Parliament election you will be given two votes. Your first vote will be for a single person to represent your constituency in the Scottish Parliament. If the election were tomorrow, which party would you be most likely to vote for with your first, constituency vote?
Q11. Your second vote will be a party list vote to elect representatives from your region of Scotland by a form of proportional representation. If the election were tomorrow, which party would you be most likely to vote for with your second, regional list vote?
Q11. Your second vote will be a party list vote to elect representatives from your region of Scotland by a form of proportional representation. If the election were tomorrow, which party would you be most likely to vote for with your second, regional list vote?
Q11. Your second vote will be a party list vote to elect representatives from your region of Scotland by a form of proportional representation. If the election were tomorrow, which party would you be most likely to vote for with your second, regional list vote?



Q12. In the Scottish Parliament Election of 2016, 56% of people voted, while 44% of people did not vote. Thinking back to the Holyrood Election in May 2016, can you remember whether or not you voted in that specific election?
Q13. Which party did you vote for with your Constituency vote in the 2016 Scottish Parliament Elections?
Q14. To what extent do you think that each of the following industries are important to the Scottish economy? Tourism
Q15. To what extent do you think that each of the following industries are important to the Scottish economy? Food and drink
Q16. To what extent do you think that each of the following industries are important to the Scottish economy? Scotch Whisky
Q17. Thinking about your local area, to what extent do you think that each of the following industries are important to your community? Tourism
Q18. Thinking about your local area, to what extent do you think that each of the following industries are important to your community? Food and drink
Q19. Thinking about your local area, to what extent do you think that each of the following industries are important to your community? Scotch Whisky
Q20. To what extent do you believe that the Scotch whisky industry is important for the following aspects of the Scottish economy? Tourism
Q21. To what extent do you believe that the Scotch whisky industry is important for the following aspects of the Scottish economy? Advertising
Q22. To what extent do you believe that the Scotch whisky industry is important for the following aspects of the Scottish economy? Agriculture
Q23. To what extent do you believe that the Scotch whisky industry is important for the following aspects of the Scottish economy? Providing employment
Q24. To what extent do you believe that the Scotch whisky industry is important for the following aspects of the Scottish economy? Exports and international trade
Q25. Which of the following statements is closest to your view?
Q26. Which of the following statements is closest to your view?
Q27. The average level of tax on a 70cl bottle of Scotch whisky is 74%. To what extent do you believe that it is fair or unfair that £3 in every £4 spent on Scotch whisky in the UK is collected in tax?
Q28. Per unit of alcohol, Scotch Whisky is taxed 19% more than wine and 51% more than beer. To what extent do you believe it is fair or unfair that Scotch whisky is taxed at a higher rate than wine and beer?
Q29. To what extent do you agree or disagree that increasing duty on whisky would show that the Westminster government doesn't care about Scotland?
Q30. To what extent do you believe that decreasing taxes on Scotch whisky would benefit the following in Scotland? Tourism
Q31. To what extent do you believe that decreasing taxes on Scotch whisky would benefit the following in Scotland? Advertising
Q32. To what extent do you believe that decreasing taxes on Scotch whisky would benefit the following in Scotland? Agriculture
Q33. To what extent do you believe that decreasing taxes on Scotch whisky would benefit the following in Scotland? Providing high quality employment
Q34. Which country do you think is the single biggest export market for Scotch whisky by value?
Q35. As the UK negotiates trade deals with European countries after Brexit, how concerned are you about the effect Brexit will have on the Scotch whisky industry?
Q36. Spirits, including Scotch Whisky, are taxed 76% higher in the UK than the EU average. To what extent do you agree or disagree with the following statement? "As our trading relationship with EU countries change as we leave the European Union, tax on Scotch Whisky in the UK should be at least as competitive as the EU average?"
Q37. To what extent do you believe that whisky tourism benefits the economy of the following? Your local community
Q38. To what extent do you believe that whisky tourism benefits the economy of the following? Scotland
Q39. To what extent do you believe that whisky tourism benefits the economy of the following? The UK as a whole
Q40. Over the past five years, Scottish whisky distilleries have invested over £500m in tourism experiences. To what extent do you think this is a good or bad use of money generated by the Scotch whisky industry?