



Public Opinion

# Public Attitudes to R&D in Scotland and Wales

March 2026

# Contents

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|   |           |
|---|-----------|
| Foreword                                | <b>2</b>  |
| Introduction                            | <b>3</b>  |
| Implications and priority actions       | <b>4</b>  |
| Results summary                         | <b>7</b>  |
| National and demographic differences    | <b>9</b>  |
| Priorities and outlooks                 | <b>11</b> |
| Awareness and understanding of R&D      | <b>16</b> |
| Benefits of R&D                         | <b>20</b> |
| R&D and place                           | <b>23</b> |
| Universities and research organisations | <b>25</b> |
| Investing in R&D                        | <b>27</b> |
| R&D in the May 2026 elections           | <b>32</b> |
| Methods                                 | <b>35</b> |

## About this report

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This report details the results of Campaign for Science and Engineering's (CaSE's) research study, Public Attitudes to R&D in Scotland and Wales 2026. It builds on the extensive public attitudes research CaSE has carried out since 2022, and explores how people in Scotland and Wales think and feel about R&D and politically salient issues ahead of the May 2026 Holyrood and Senedd elections. The results provide a resource to support advocates in making an effective case for R&D, both in the run up to the elections and beyond into the next parliaments.

CaSE thanks our project sponsors for making this work possible, as well as Phil Downing at Icaro for leading the study, along with Jayne Cox at Brook Lyndhurst and the team at YouGov. We would also like to thank the organisations and individuals who participated in workshops to shape the topics explored in this research.

This work was funded by our project sponsors and a grant from Wellcome (318810/Z/24/Z).

## Foreword



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**Elections offer advocates a unique opportunity to make a refreshed case for research and development (R&D) and widen its pool of political supporters. This May's elections in Scotland and Wales are no different. To do so effectively, we must understand what resonates with the voter base in these nations and use this knowledge to shape our advocacy.**

Campaign for Science and Engineering (CaSE) explores public attitudes to R&D not only to gather evidence, but also to turn these insights into practical tools that support the sector's advocacy.

This year, we are focusing on the elections in the Senedd and Holyrood. They come amid a shifting political landscape. With changes to the electoral system in Wales, and a rapidly evolving and increasingly polarised voter base across both nations, we can expect many new faces in Holyrood and the Senedd come summer.

The R&D community needs to proactively engage with candidates and elected parliamentarians in the Senedd and Holyrood, to build awareness of, and support for, Scottish and Welsh R&D. We can do this more effectively if we first understand how people in the nations – their voters and constituents – think and feel about R&D.

CaSE's new study, Public Attitudes to R&D in Scotland and Wales 2026 – made possible by the support of our project sponsors and Wellcome – provides insights at unprecedented depth. The results offer a fascinating and granular view on how people view R&D as a political and societal issue in the two nations, giving advocates a valuable resource both now and for years to come.

When it comes to R&D, there is strong support in general terms, but many don't feel a personal connection with R&D and are uncertain about its benefits or the work that R&D organisations do. We can and must do more to show the public how R&D is tackling the issues they care about.

It may offer reassurance to advocates that support for R&D can be found among voters across the political spectrum. However, priorities begin to diverge around certain R&D topics – with implications for how the R&D community should tailor our messages for different audiences.

Looking ahead to the new Senedd and Scottish Parliaments, it is positive to see the public express clear appetite for more information on R&D and for their elected representatives to become champions for R&D both locally and nationally. New statistical modelling of attitudes at the constituency level demonstrates that such support is broadly consistent across constituencies.

We must build on this appetite. Our community should not be afraid to speak up for R&D in Scotland and Wales, and we must encourage elected representatives to do the same.

We have a positive story to tell politicians: there is much support for R&D, and these results suggest there is little political risk in advocating for it.

We also have data to support engagement at the local level. CaSE is providing all parliamentary candidates with bespoke insights about the public's – and their constituents' – views, urging them to start conversations in their communities and engage with local R&D organisations.

We hope this tailored engagement will help forge new connections and nurture a new set of champions for R&D in Holyrood and the Senedd. CaSE urges you to join us in putting these insights into action and advocating for R&D in Scotland and Wales.

### Project sponsors



## Introduction

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The 2026 Holyrood and Senedd elections present the research and development (R&D) sector with a unique opportunity to nurture a new cohort of supporters among new and continuing elected representatives in Scotland and Wales. The elections come amid a shifting political landscape that could undermine cross party support for R&D. CaSE is working to raise the profile of R&D in both nations and support advocates in making an effective case for R&D, both in the run up to the elections and into the next Senedd and Scottish Parliament.

R&D helps tackle the issues that matter to people in Scotland and Wales and can improve lives and livelihoods locally, across each nation, and around the world. However, it can only deliver these impacts if the public and policymakers see its full potential and support R&D investment. Much public R&D funding in Scotland and Wales comes from UK-wide competitive research funding through UK Research and Innovation (UKRI). However, the governments of Scotland and Wales also invest in R&D, including through higher education and economic development powers, which are devolved.

This project has been made possible by the generous support of our project sponsors and grant funding from Wellcome. This new study, *CaSE Public Attitudes to R&D in Scotland and Wales 2026*, explores attitudes to R&D and appetite for local action on R&D among over-16s in Scotland and Wales, to gather views from those of voting age in the two nations.

The study builds on CaSE's extensive programme of research into public attitudes to R&D, which aims to make R&D matter to more people.

The survey looks at awareness of R&D and its benefits, attitudes to R&D investment by devolved governments, and attitudes to universities and research organisations in the nations. To bolster the sector's advocacy, it also explores appetite for local action on R&D by elected representatives, and CaSE has commissioned constituency-level analysis on a group of these questions.

The themes, topics and questions were informed by CaSE's existing public opinion research and in-depth engagement with project sponsors and R&D advocates across disciplines and sectors in both Scotland and Wales.

We designed the two surveys to ask the same 28 questions to respondents in each nation, naming the relevant nation or parliament, to allow for comparison.

They were taken by nationally representative samples of 2,707 and 1,626 adults (16+) in Scotland and Wales, respectively, allowing insights into public attitudes at an unprecedented depth. Where relevant, we also make comparisons with CaSE's previous public opinion research.

CaSE's public opinion research is supported by a consortium of research agencies, led Icaro, with quantitative fieldwork in this study delivered by YouGov.

## Methods

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The research was led by Icaro, a Market Research Society (MRS) Company Partner. Survey fieldwork was executed by YouGov, who are a member of the British Polling Council and abide by its rules.

The research adopted a quantitative approach, involving a large scale survey of 2,707 adults 16+ in Scotland and 1,626 adults 16+ in Wales, using YouGov's proprietary online panel, in January 2026.

Quota targets were set on region, age, and gender (interlocked within region), and ethnicity, to ensure that the sample reflects the known profile of the Scottish and Welsh populations on these demographic criteria.

In addition to standard reporting, a Multi-Level Regression

with Poststratification (MRP) analysis was carried out on six questions, to model the expected attitudes at a constituency level.

Full methods can be found at the end of the report.

### Socioeconomic group

Our research uses the term socioeconomic group, which describes the types of job someone does and is based on the main income earner in the household.

- AB – Intermediate and higher managerial professions
- C1 – Junior managerial professions
- C2 – Skilled manual workers
- DE – Semi- or non-skilled manual workers and non-working people

## Implications and priority actions

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The world-leading R&D happening across Scotland and Wales is delivering impact at every level – from benefitting local economies to tackling global challenges. But this impact relies on sustained support and investment by each of the devolved and UK governments.

Elections offer an opportunity for the sector to restate the case for R&D to political and voter audiences. While there will always be a turnover of politicians, the 2026 Holyrood and Senedd elections – which are taking place in a shifting political landscape – are expected to return a significant number of new representatives in both parliaments.

Our sector needs to know how to engage with an increasingly fragmented voter base. This research offers insights into how voters think and feel about R&D – allowing us to tailor our advocacy and convey R&D's relevance to new or continuing elected representatives.

The results of *CaSE Public Attitudes to R&D in Scotland and Wales 2026* demonstrate broad support for R&D investment and political actions to support the sector in both nations, and crucially this spans the voter spectrum. But underlying this high-level support is low awareness of, or connection with, R&D and its personal or local benefits, particularly among those who feel most pessimistic about their nation.

Advocates must act now to connect R&D to a story of hope and optimism for the future. This message must reach all parts of society, including those who feel disengaged, if we are to secure long-term public and political support.

Reflecting on the results of this study, CaSE has identified a set of overarching themes and actions for the sector.

### **The mood is divided in both nations, with a strong sense of pessimism that is particularly pronounced in Wales.**

Within each nation there are hugely contrasting moods, from hope and optimism among some to a deep sense of pessimism and decline for others. This divided outlook extends to people's sentiments towards their local area. Meanwhile, the public's three highest priorities – improving the NHS, the cost of living, and growing the economy – remain consistent with previous polls. The most significant differences in public priorities are driven by voting intention; with consensus on the very top priorities but clear divergence after this point, in line with people's political leanings. The R&D sector needs to frame R&D as a source of hope for the nations' future and demonstrate it is a tool for tackling the problems that people care about.

### **There is strong in-principle support for investment in R&D, but many don't feel a personal connection to R&D or the benefits it delivers.**

In both Scotland and Wales, around three quarters think it is important for their devolved government to invest in R&D in their nation (77% in Scotland and 72% in Wales) and half want to see devolved government investment levels sustained or increased. However, many feel that R&D isn't relevant to their lives or don't feel connected with R&D's benefits. This core dilemma facing advocates – that public support for R&D is broad but shallow – is one CaSE has consistently identified in its UK-wide research.

### **Large parts of society remain uncertain about R&D, presenting both a risk and an opportunity for advocates.**

Across this survey, large groups of people selected 'don't know' or neutral answers, suggesting a high level of uncertainty or apathy about the R&D system. This poses a risk for the sector's advocacy, as we cannot expect continued support from those who feel disconnected or uncertain about R&D or its benefits. However, this also highlights an opportunity: rather than active opposition, we have the chance to convert uncertainty through engagement. CaSE's research consistently finds that those who feel more connected with R&D are likely to feel more positive about R&D and investment in it. If we can address people's uncertainty and strengthen awareness through increased communication, engagement, and involvement, there is an opportunity to activate a new set of supporters.

### **The work of R&D organisations, and the economic impact of R&D for Scotland and Wales, is not widely recognised.**

The visibility of the R&D sector in Scotland and Wales is very low: substantial majorities say they don't know much or anything about the R&D being undertaken in their nation (87% in Scotland and 91% in Wales). Only a minority think that R&D makes a very or fairly big contribution to the economies in Scotland and Wales, and very few currently see R&D as a national strength for either nation, with the figures notably less positive in Wales.

## Implications and priority actions

Many are also uncertain or unconvinced of the effectiveness of universities and research organisations in carrying out various R&D-related activities – yet a clear majority in both Scotland and Wales think it is important these organisations carry them out. There is an opportunity for advocates in both nations to deepen awareness of R&D's contributions with tangible, relevant examples that articulate the economic and social benefits to communities within Scotland and Wales.

### **R&D carries appeal for voters across the political spectrum – but advocates must tailor their engagement to suit different voter bases.**

At the highest level, there is strong support for devolved governments to invest in R&D, regardless of which party people intend to vote for. However, the extent to which people would prioritise R&D investment for specific issues varies. In both nations, R&D for defence is less of a priority for those intending to vote Green (as well as Scottish National Party (SNP) and Plaid Cymru voters), while environmental R&D is a clear priority. Conversely, those intending to vote Reform UK and Conservative feel more positively towards defence-related R&D, with environmental or social sciences R&D relatively lower priorities. Those who say they would not vote in the May 2026 elections are more likely to feel uncertain or neutral towards any type of R&D, and R&D investment more broadly.

Advocates must consider the best framing for their messages when communicating the purpose of R&D, and will be more effective if they adapt to their audience. CaSE's research consistently emphasises the need to show how R&D is tackling the issues that people care about. This latest research confirms the broad voter appeal in talking about R&D to support the NHS, but that a more tailored approach is needed for individual voter groups.

### **Although elections offer powerful moments for engagement, advocates must not lose sight of those who feel most distant from R&D.**

While many already value R&D, some demographic groups are consistently less certain or supportive of R&D. In addition to those who do not intend to vote, CaSE research shows that those in socioeconomic group DE, with lower household income or with lower levels of formal education are all much more likely to feel disconnected from R&D and

its benefits. Although useful in some situations, targeting engagement purely based on voting intention in a rapidly shifting political landscape can miss an opportunity to reach a broader audience, including non-voters.

### **R&D can be a source of pride for the public, and advocates should fulfil the appetite for more information about R&D's purpose and the places it happens.**

There is strong appetite in both Scotland and Wales to know more about R&D, with around half of people interested in hearing about R&D in the run up to the May 2026 Holyrood and Senedd elections (54% in Scotland; 53% in Wales). Many would support a new R&D laboratory being built in their area and a majority (66% in Scotland; 60% in Wales) would feel proud if their area became well known as an important hub for R&D in Wales or Scotland. Our findings also show that providing examples of the economic and employment benefits of R&D drives up support for public investment.

### **Campaigning for R&D is an opportunity for MSPs and MSs, with little apparent political risk.**

Three quarters of people in each of Scotland and Wales support their MSP or MS campaigning for more R&D to improve NHS experiences, diagnosis and treatment; two in three support them championing Scottish or Welsh universities; and comfortably over half support them campaigning for more R&D jobs, and support for both R&D businesses and for more inward investment.

Just as importantly, being a champion for R&D in these ways appears to present little political risk. For the areas we tested, outright opposition among the public to their MSP or MS taking action is typically low (2-6%), rising only in one instance – for campaigning for more R&D funding in the defence industry (to 13% in Scotland, and 12% in Wales).

Even on a divisive issue like immigration, we find some areas of agreement: overall, a majority feel it should be made easier for high skilled workers to come to the UK. This holds for all voter groups except those who would vote Reform UK, however even in this group around four in ten support the position compared with around one in five in Scotland, and one in six in Wales, who oppose it. Advocates should not be afraid to speak up for R&D in Scotland and Wales, and should encourage and equip elected representatives to do the same.

# Implications and priority actions

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## Priority actions

Advocates are not starting from scratch – the sector can build on broad public awareness and instinctive support for R&D in Scotland and Wales, and the wealth of expertise in building lasting relationships with the public in both nations.

There are powerful ways to connect through place, purpose and participation: talking about where R&D happens, how it is tackling societal challenges, and bringing the public closer to the research system. Advocates must act without delay to deepen the connection between the nations' R&D sectors and the local people and communities they serve.

CaSE's extensive public attitudes research has identified a series of urgent priority actions for the sector – all of which align with the findings of this survey and require concerted action from R&D advocates in Scotland and Wales now and into the coming parliaments.

### Advocates in Scotland and Wales should:

- **Act collaboratively and with urgency** to develop more coherent and compelling narratives about R&D's role in society.
- **Make R&D feel more human and more local** by opening up the processes and places associated with R&D, to help build and maintain trust.
- **Demonstrate R&D's relevance to priority issues** by showing that our sector is helping to tackle the issues that matter most to the public now.
- **Foreground the breadth and scale of the R&D workforce** to highlight their contribution not just to research itself, but also to local communities.
- **Bring a sense of pride and optimism** to the public, recognising the general sense of public pessimism and offering R&D as a route forward.
- **Ensure sustained commitments to communication, engagement and involvement** through long-term, sufficient resourcing – including funding, time and training – and strong leadership from R&D leaders and organisations.
- **Make politicians advocates not adversaries** by equipping them with the evidence, examples, and confidence to talk to the public about R&D on the doorstep.

These actions are fundamental and we urge R&D advocates across the whole of the UK to work together in putting them into practice.

This research, however, was entirely framed around Scotland and Wales, and included many topics relevant specifically to those nations. It provides an unprecedented depth of information on public attitudes that can be used to support specific engagement and advocacy activities. Advocates have an opportunity to tune their messages within Scotland and Wales, making use of findings such as notably high levels of support for R&D into modernised farming technology and practices in certain regions.

One notable difference in our findings between the two nations is the deeper sense of pessimism in Wales; connecting R&D to a sense of pride and optimism to position the sector as a route forward will be especially important here.

We urge R&D advocates to consider these findings and the implications for their own work in Scotland and Wales. CaSE will be doing the same.

## Results summary

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This section summarises the findings from Public Attitudes to R&D in Scotland and Wales 2026 by theme. The section ends with a summary of notable differences between and within the two nations, by demographic groups, by vote intention and by respondents' outlooks and awareness of R&D. Further details and data visualisations can be found throughout the report and on our website.

### Priorities and outlooks

- The public are divided on how well their nation is doing, with the balance in Wales weighted slightly towards the view that the country is in decline.
- Improving the NHS ranks as the top priority for the public in Wales and consistently in the top two priorities in Scotland, regardless of voting intention. But beyond this, there is a clear divergence in priorities between voter groups.
- Fewer than one in ten selected investing in research, science and technology as one of their top five priorities (9% in Scotland; 7% in Wales).
- A majority in both Scotland (57%) and Wales (54%) said that it should be made easier for high skilled workers to come to the UK, but attitudes vary significantly towards ease of entry for low skilled workers and asylum seekers.
- The top three priorities have remained consistent across CaSE research since 2022, while concerns about immigration continue to rise, especially for some groups.

### Awareness and understanding of R&D

- Less than half (47% Scotland; 43% Wales) said they had heard of the term "R&D" and know what it means, rising to around eight in ten (82% Scotland; 77% Wales) when "research and development" is spelled out in full. This is consistent with previous CaSE research.
- When prompted, people associate R&D with universities, charities, large businesses, and NHS hospitals, with much lower recognition of the role of small and medium sized businesses. People in Scotland associated R&D more strongly with all organisation types tested compared with their Welsh counterparts.

- Levels of knowledge about the R&D being undertaken in Scotland and Wales are very low and few currently see R&D as a national strength for either nation.
- Around half of people in both nations (54% in Scotland; 53% in Wales) said they would be interested in hearing about R&D in the run up to the Senedd and Holyrood elections in May 2026.

### Benefits of R&D

- Only around one in ten (11% in Scotland; 9% in Wales) said they can immediately think of lots of ways that their nation benefits from R&D, falling even further when asked about benefits to their local area (7% in Scotland; 6% in Wales) or them and their family (7% in Scotland; 5% in Wales).
- A minority said that R&D makes a very or fairly big contribution to the economy in Scotland (32%) and Wales (18%). The largest group (40% in Scotland; 46% in Wales) said they don't know if it contributes or not.
- Just over one in three said that R&D was relevant to their life (38% in Scotland; 35% in Wales). Far fewer (15% in Scotland; 16% in Wales) said they feel connected with R&D.

### R&D and Place

- Around half of people (53% in Scotland; 49% in Wales) would support a new R&D laboratory in their local area, while close to two in three (65% in both Scotland and Wales) would support a new science museum or discovery centre.
- A majority of around three in five (66% in Scotland; 60% in Wales) would feel proud if their area were to become well known as an important hub for R&D in Wales or Scotland.

## Results summary

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### Universities and research organisations

- Most people in both Scotland and Wales think it is important for universities and research organisations to carry out a range of R&D-related activities, with 90% and 88% thinking it is important these organisations help build a highly skilled workforce for Scotland and Wales, respectively.
- However, there are mixed views on how effective universities and research organisations are at delivering these activities, with a sizeable group saying they don't know for each activity.
- At least half think that universities and research organisations are effective at producing high quality research outputs (59% say they are very or fairly effective in Scotland; 50% in Wales).
- These findings align with CaSE's wider qualitative research, which shows that many participants are initially unsure of universities' role in research.

### Investing in R&D

- Around three quarters think it is important for their devolved government to invest in R&D in their nation (77% in Scotland and 72% in Wales), and this majority support (66-87%) extends across all voter groups.
- Half of people in Scotland (55%) and Wales (50%) said the amount their devolved government invests in R&D should either be increased or maintained.
- In both nations, the highest priority for additional public R&D investment was in advances in medical research to improve diagnosis, treatment and support, while extra public investment in AI advances was the lowest priority.
- Specific examples of the economic impact of R&D activity in Scotland and Wales appear to increase support for R&D investment and reduce uncertainty.
- A majority in each nation think that it should be a priority for their devolved government to support R&D in universities, research organisations, and businesses in a range of ways.

### R&D in the May 2026 elections

- People in Scotland and Wales want to see their elected representatives actively supporting R&D both locally and nationally.
- Support is strongest for representatives taking actions linked to healthcare, with clear majorities supporting them to campaign for more R&D to improve NHS patient experiences, diagnosis, and treatment and for their nearest NHS hospital to host more clinical trials.
- Levels of opposition to all actions tested are very low, with opposition peaking (at 13% in Scotland and 12% in Wales) for campaigning for greater funding for R&D in the defence industry.
- Those intending to vote Reform UK were somewhat less supportive than average across almost all actions, except for campaigning for greater funding for R&D in the defence industry (58% in Scotland and 59% in Wales support this).
- Constituency-level modelling predicts that the high levels of support we see for local actions related to R&D and devolved governments' investment in R&D are broadly consistent across constituencies in both Wales and Scotland.

# National and demographic differences

## National differences

There are broad similarities across Scotland and Wales. The priority issues that respondents in these nations identify are very similar, their outlooks towards different kinds of immigration are also similar, and there is a deep polarisation in both countries between those who are optimistic and see the country as being on the right path and those who are pessimistic and see the country in decline. There are also similarities in outlooks towards R&D, particularly in the lack of awareness about the role of R&D in Scotland and Wales and its contribution to the economy.

However, there are clear differences between the two nations. In Wales, there is more pessimism and a stronger sense of the country being in decline, more ambivalence and uncertainty about R&D, and less awareness of the role and contribution of R&D (including the role of universities and research organisations).

Within Wales, there is a city-town trend that sees higher levels of optimism in cities and much less in large or medium towns. Linked to this, optimism and engagement are higher in Cardiff and lower in the surrounding Valleys.

By contrast, Scotland has a more even balance between optimism and pessimism, and has higher levels of awareness of R&D, and a more positive outlook than Wales towards the role of R&D. There are fewer regional differences and the city-town trend seen in Wales is not evident in Scotland. However, there is a tendency for less positivity and more ambivalence in the Scottish Borders.

## Demographic differences

Alongside the results across Scotland and Wales as a whole, this report highlights differences between demographic groups, regions, voting intention, and the way respondents answered other questions.

The most notable demographic differentiators were socioeconomic group, household income, and level of formal education. Those in group AB, those with an annual household income of £70,000+, and those with a university degree or higher are more likely than average to feel connected with and more positive towards R&D. By contrast, those in group DE, with lower levels of formal education and levels of annual household income up to £20,000, were less likely to cite a connection or positivity towards R&D. Rather than any trend towards negativity, the main characteristics of these groups was a higher level of

don't know or ambivalent (neither/nor) responses, indicating low levels of engagement.

There are also some trends by gender, with women more likely at points to say 'don't know', particularly in relation to specific aspects or themes of R&D, as well as funding levels for R&D. For example, when asked whether the amount their devolved government invests in R&D should either be increased, maintained or reduced, 48% of women (in both Scotland and Wales) answered 'don't know', compared with 30% of men in Scotland or 36% of men in Wales.

In this study, age was a less consistent differentiator throughout the survey than in some of CaSE's previous research. There were some notable differences for specific age groups, which are discussed in the relevant section.

## Voting intention differences

The voter landscape is fragmented, although in both nations three main clusters emerge from the data: Reform UK/Conservative; Green; and Labour/Lib Dem/SNP/Plaid Cymru. Despite differences within this latter group, there are also many similarities among these voters.

Attitudes of Green voters to R&D tended to align more closely with Labour, Lib Dems or the SNP/Plaid Cymru (respectively), except in their assessment of the efficacy of universities and research organisations, where they were closer to Reform UK and Conservative voters.

From an R&D perspective, these voter clusters make little difference when talking about R&D in general terms. Some groups are more positive towards R&D (especially those intending to vote SNP, Labour, Liberal Democrats and Greens in Scotland; and Labour and Plaid Cymru in Wales), and are more likely than average to perceive benefits from R&D.

Other groups, including those intending to vote Reform UK and Conservative, are somewhat less engaged and less likely to immediately identify benefits, but nonetheless the overall pattern is still supportive. The main difference is the level of 'don't know' and ambivalent (neither/nor responses) among Reform UK voters. In part this reflects the demographic groups who intend to vote for each party. The group that are least engaged with R&D are those who do not intend to vote.

## National and demographic differences

However, voting intention becomes a material consideration for R&D at the level of some specific polarising issues. For example, those intending to vote Green (as well as SNP and Plaid Cymru voters) are much less likely to prioritise extra R&D funding for defence and military purposes and much more likely to prioritise R&D funding for environmental or social objectives. The opposite is true for those intending to vote Reform UK or Conservative.

When considering examples of specific economic benefits of R&D, framed around different sectors, we see similar reactions. For example, those who intend to vote Green in Scotland are somewhat less likely to support increased or maintained investment in R&D when it is framed around the pharmaceutical industry, but more supportive when framed around higher education. The reverse is true of Reform UK voters, who are somewhat less supportive of increased or maintained R&D investment when the example is framed around higher education sector (but still supportive overall), and more supportive of industry-based examples.

*To note, throughout this report, 'Green' is used to refer to the Scottish Greens in Scotland, and the Green Party of England and Wales in the Welsh results. In addition, due to the base size of those intending to vote Green in Wales at the May 2026 elections in this study being too small to analyse, the attitudes of respondents in Wales who voted Green in the 2024 UK General Election has been used as a proxy.*

### Connection with R&D

The survey consistently demonstrates that those interested in, and connected to, R&D are consistently more positive and supportive. For example, those who said they knew a lot about R&D in Scotland/Wales were more likely to be able to think of ways R&D benefits them or their family, and to think that Scotland/Wales should increase or maintain investment in R&D. This same pattern is evident whether or not respondents think that R&D is one of the country's strengths; and whether or not they think R&D makes an important economic contribution.



# Priorities and outlooks

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## Key takeaways

- The public are divided on how well their nation is doing, with the balance in Wales weighted slightly towards the view that the country is in decline.
- Improving the NHS ranks as the top priority for the public in Wales and consistently in the top two priorities in Scotland, regardless of voting intention. But beyond this, there is a clear divergence in priorities between voter groups.
- Fewer than one in ten selected investing in research, science and technology as one of their top five priorities (9% in Scotland; 7% in Wales).
- A majority in both Scotland (57%) and Wales (54%) said that it should be made easier for high skilled workers to come to the UK, but attitudes vary significantly towards ease of entry for low skilled workers and asylum seekers.
- The top three priorities have remained consistent across CaSE research since 2022, while concerns about immigration continue to rise, especially for some groups.

## Priorities

To understand the context in which R&D sits, and in which the sector must advocate, it is important to first understand the public's priorities. Respondents were asked to select up to five issues that they felt should be the main priorities for political parties in Scotland and Wales.

The options in the list were chosen to represent three themes:

1. Typical high-level manifesto or political priorities, such as the NHS, the economy, crime, immigration, and energy.
2. Nation-specific issues such as independence, language, and culture.
3. R&D-specific issues, such as investing in research and attracting high skilled workers from overseas.

There are a clear top two in both Scotland and Wales (Figure 1): improving the NHS (selected by 68% in Scotland and 73% in Wales) and reducing the cost of living (62%; 56%). This is followed by growing the economy (41%; 33%), reducing immigration (30%; 31%) and increasing the availability and affordability of housing (30%; 26%).

Fewer selected attracting high skilled workers from overseas as a priority (4%; 3%), supporting businesses to start up and scale (7%; 9%), and strengthening the armed forces/defence (7%; 8%). Fewer than one in ten selected

investing in research, science and technology as one of their top five priorities (9% in Scotland; 7% in Wales).

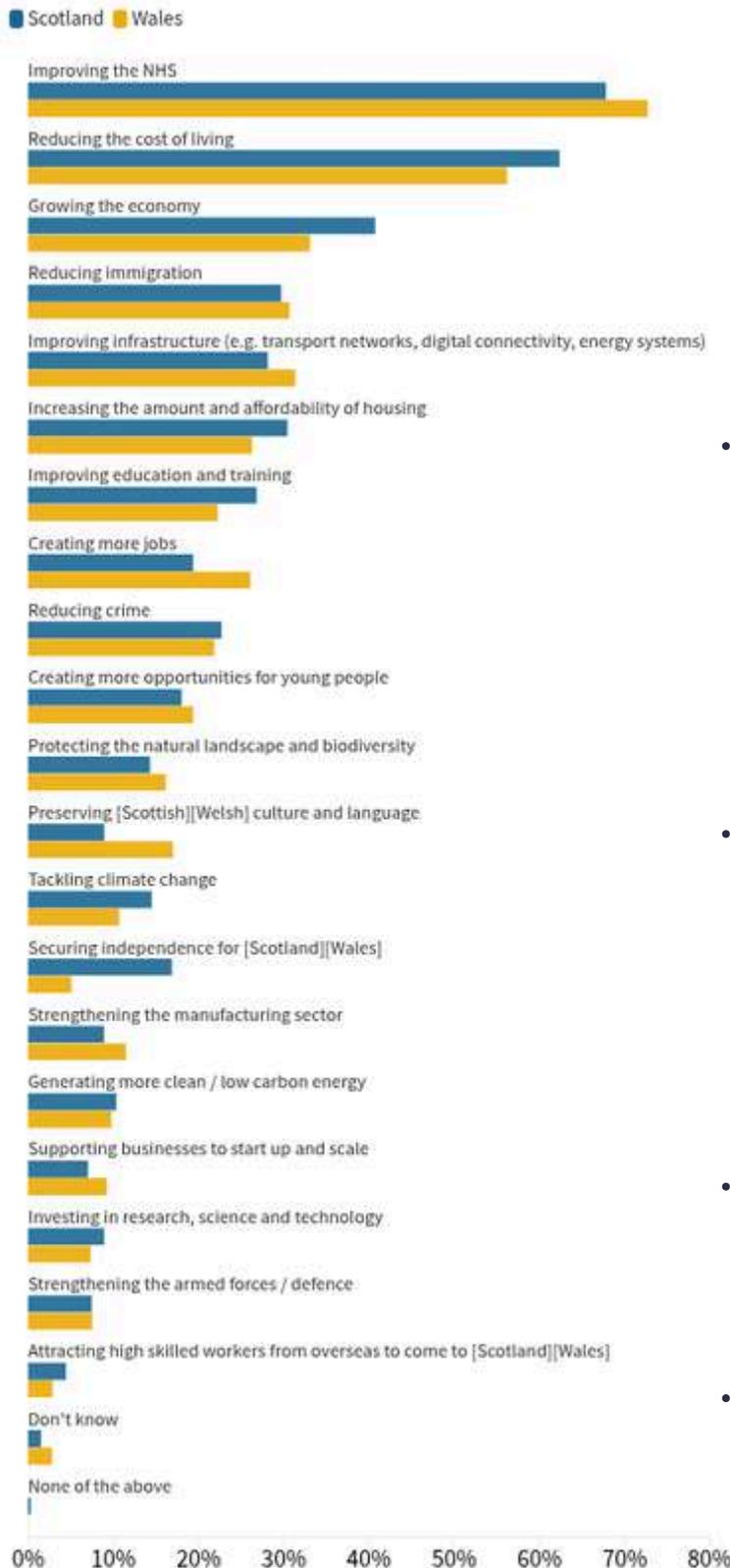
The top three issues have been consistent across CaSE's research since 2022, and more recent polling has also identified rising concerns about immigration. [CaSE's Public Attitudes to R&D 2025 \(PAR25\)](#) study found that the investing in research option performs better when respondents are asked to consider it in on its own, rather than tensioning it against other priorities.

When looking at voting intention – the political party respondents intend to vote for at the May 2026 Holyrood or Senedd elections – we find that improving the NHS and tackling the cost of living are prioritised by all groups. Beyond these issues, however, there is a clear divergence (references to 'voters' below reflect voting intention except when specified):

- Reform UK voters in both nations were significantly more likely to select reducing immigration as a priority (78% compared with the national average of 30% in Scotland, and 67% compared to the national average of 31% in Wales). They were also much more likely to prioritise reducing crime (41% compared with the national average of 23% in Scotland, and 34% compared with the national average of 22% in Wales). By contrast, only 1% (in both Scotland and Wales) selected generating more clean/low carbon energy (compared to the national average of 10% in both Scotland and Wales).

# Priorities and outlooks

**Figure 1: What are the priorities for the public in Scotland and Wales?**



- Green voters have a markedly different set of priorities to Reform UK voters, and indeed to their nations as a whole. In Scotland, they were much more likely to prioritise tackling climate change (47% compared with the national average of 15%), increasing the availability and affordability of housing (40%; 30%), protecting the natural landscape and biodiversity (31%; 14%) and generating clean energy (31%; 10%). They were much less likely to select growing the economy (23%; 41%) and reducing immigration (6%; 30%). *(The base size of those intending to vote Green in Wales is too small to analyse, but the same profile of priority issues is evident when looking at respondents in Wales who voted Green in the 2024 UK General Election.)*
- Conservative voters – in both Scotland and Wales – were similar to Reform UK voters in prioritising immigration and crime. For example, in Scotland 39% selected immigration as a priority (compared with the national average of 30%), increasing to 45% in Wales (compared with the average of 31%). However, in contrast to other voters, we saw above-average prioritisation of issues related to the economy, such as growing the economy and supporting businesses to start up and scale.
- Labour voters in Wales were much more likely to prioritise improving the NHS (86%; compared with the national average of 73%), increasing the amount and affordability of housing (34%; 26%), improving education and training (33%; 22%) and creating opportunities for young people (27%; 19%). A similar pattern was evident in Scotland, although the differences compared to the national average were less pronounced.
- Plaid Cymru voters were more likely to select improving infrastructure (40%, compared with the national average of 31%), protecting Welsh culture and language (32%; 17%) and creating more opportunities for young people (26%; 19%).
- Scottish National Party (SNP) voters had priorities broadly in line with the national average – except for securing independence for Scotland, which 46% selected as a priority, compared with a national average of 17%.

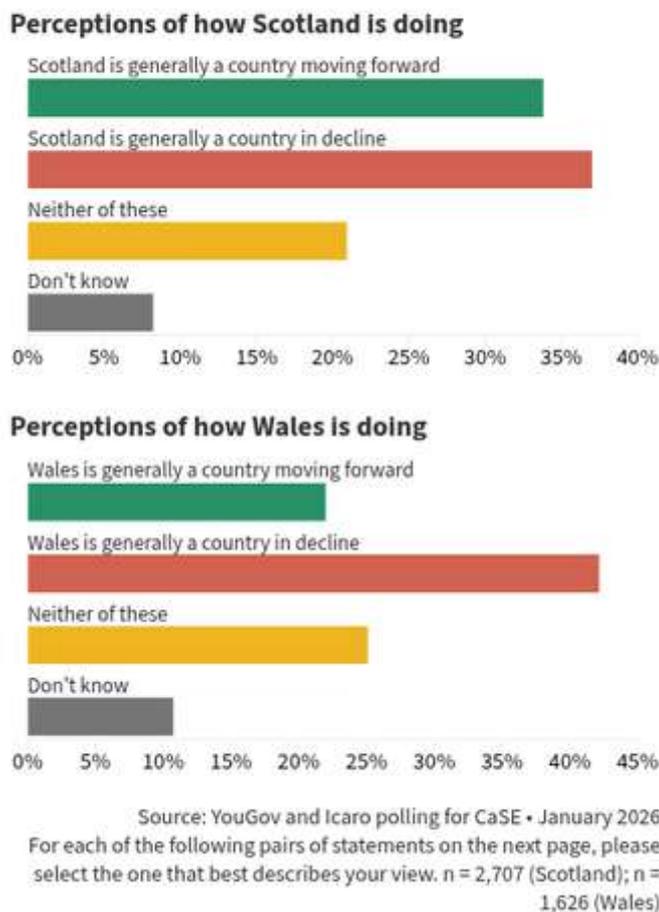
Source: YouGov and Icaro polling for CaSE • January 2026  
 What do you think should be the top priorities for political parties in [nation]?  
 Please select up to 5. n = 2,707 (Scotland), n = 1,626 (Wales)

## Priorities and outlooks

### Outlooks

Sentiments about the direction of travel in Scotland and Wales are divided (Figure 2). Just over one in three (37%) in Scotland selected “Scotland is generally a country in decline”, while a similar proportion (34%) selected “Scotland is generally a country moving forwards”. In Wales, the balance tilted towards decline (42% compared with 22%). In both nations, a significant proportion selected neither of these positions (21% in Scotland; 25% in Wales).

**Figure 2: What is the public's view on how their nation is doing?**



There are a range of sub-group differences, with sentiments differing significantly according to voting intention at the May 2026 Holyrood and Senedd elections. (References to ‘voters’ below reflect voting intention except when specified.)

- Reform UK voters were the most pessimistic. Around three quarters (76% in Scotland; 73% in Wales) think the country is in decline (compared with 6% and 6%, respectively, who said it is moving forwards).

- There is a similar pattern among Conservative voters - 68% in Scotland, and 56% in Wales, think the country is in decline (compared with 7% and 15%, respectively, who think it is moving forwards).
- By contrast, Green and SNP voters in Scotland have the reverse outlook – just 15% and 13%, respectively, think the country is in decline, while 60% and 64%, respectively, think it is moving forwards.
- In Wales, Plaid Cymru voters were more evenly balanced (32% said Wales is in decline compared with 35% who said it is moving forwards).
- Labour voters were the most optimistic in Wales (24% in decline; 43% moving forwards), but this was reversed in Scotland (45% in decline; 25% moving forwards).

The differences across voting intention extend to voting behaviour on independence. Among those who said they would vote in favour of independence for Scotland the balance is optimistic: more than half (57%) said it is moving forwards, compared with 18% who said it is in decline. In contrast, among those who say they would vote against independence the balance was pessimistic (13% moving forwards; 60% in decline). A similar trend was evident in Wales with pro-independence voters much more optimistic than those who said they would vote against independence.

Demographic trends are also evident. For example:

- Those in Wales who live in towns were notably more pessimistic. Around half of those who said they live in large towns (52%) or medium/small towns (48%) said Wales is a country in decline, compared with those in cities (34%) and villages (38%). The same trend is not seen in Scotland.
- Regionally, those in South Wales Central and South Wales East were notably more pessimistic (50% and 48%, respectively, think Wales is in decline). In South Wales, Cardiff is the exception, with far fewer (32%) thinking the country is in decline. Those in North Wales (37%) are also less likely to think the country is in decline.
- In Scotland, there are fewer regional differences, except for the Lothians region where the outlook is notably more optimistic (40% said Scotland is moving forward compared with 30% who said it is in decline).

## Priorities and outlooks

- There is also a strong trend by age. In Scotland, well over half (56%) of 16-24s said the country is moving forwards compared with 21% who said it is in decline. Among those aged 65+, this reverses (23% moving forwards; 47% in decline). The same trend is seen in Wales.

### Perceptions of how well their area is doing

Respondents' perceptions of how well their local area is doing varied markedly within each nation (Figure 3). In Scotland, around three in ten (31%) said their local area is doing well, compared with a similar proportion (34%) who said it is doing badly. The results in Wales are similar, but the balance leaned towards doing badly (26% doing well; 38% badly). A similarly sized group of around three in ten said 'neither' (28% in Scotland; 29% in Wales).

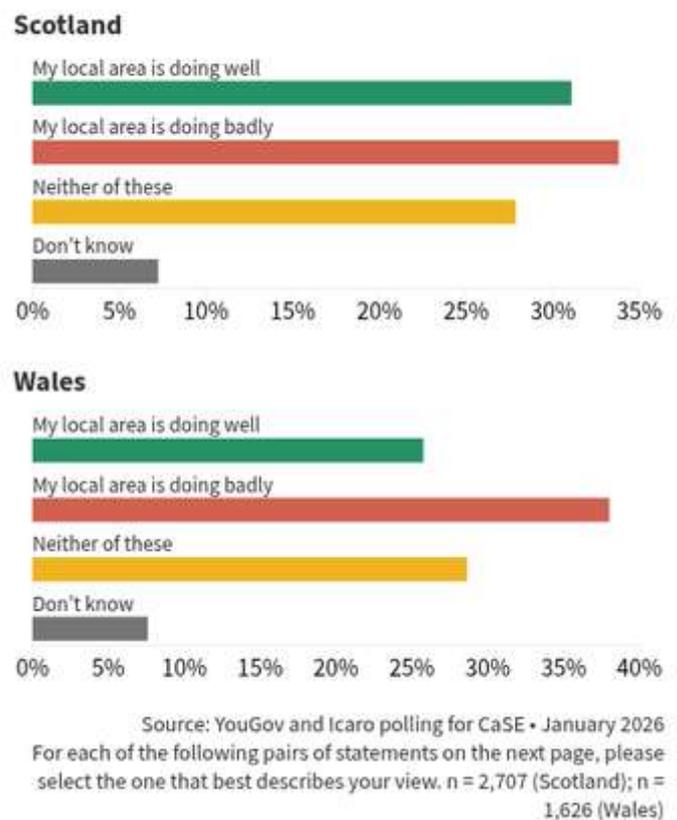
There is a high degree of overlap between sentiment towards Scotland and Wales as nations, and sentiment towards their local area. This is different to the UK, where [CaSE's PARD25 study](#) indicated a clear divergence between broader national mood (which was gloomy) and views about the local area (which was, in some cases, more positive).

Sub-groups followed similar patterns as previously observed. Voting intention at the May 2026 Senedd and Holyrood elections was highly correlated with perceptions of how well the local area is doing, with Reform UK voters most pessimistic, and SNP and Liberal Democrat voters in Scotland and Labour voters in Wales most positive. Patterns in local sentiment also differed by:

- Age, with pessimism increasing with age.
- Urbanity in Wales, where there is a pattern of those living in a city being the most positive and those living in large and medium-sized towns the least positive (i.e. a city-town effect; not an urban-rural effect).
- Region, with pessimism highest in South Wales Central and South Wales East, and in the Central region in Scotland.
- Socioeconomic group within Scotland, with ABs more optimistic on balance (38% doing well; 29% badly) and DEs more pessimistic (25%; 39%). This trend is also apparent – but weaker – in Wales.

The variation in opinion about how well their local area is doing was also clear in CaSE's PARD25 study and accompanying focus groups. While all focus group attendees could find positives about their local areas, there was a prevailing sense of "decline", "decay", and "sadness" among participants in some areas, including Middlesbrough, Nottingham, Clacton, and Sutton/Croydon. This was not as evident in Cardiff, Taunton, Edinburgh, and Belfast, where sentiment was positive on balance.

**Figure 3: How well do the public in Scotland and Wales think their local area is doing?**



### Attitudes to immigration

Attitudes to immigration vary significantly, with very different views on whether it should be made easier or more difficult for high skilled workers, low skilled workers, or asylum seekers, to come to the UK (Figure 4).

A majority in Scotland (57%) and Wales (54%) said that it should be made easier for high skilled workers (e.g. scientists, doctors, engineers) to come to the UK. Just over one in four said it should be the same level of ease or difficulty as now (28% in Scotland; 29% in Wales), while a minority of around one in ten (10% in Scotland; 11% Wales) said it should be more difficult.

## Priorities and outlooks

Attitudes relating to lower skilled workers (e.g. in hospitality, care, manual labour) were divided in Scotland, with 31% believing it should be made easier for them to come to the UK and a similar proportion believing it should be the same as now (31%) or more difficult (32%). The same three positions are evident in Wales, but the balance was in favour of making it more difficult (25% think it should be made easier, 31% the same, and 37% more difficult).

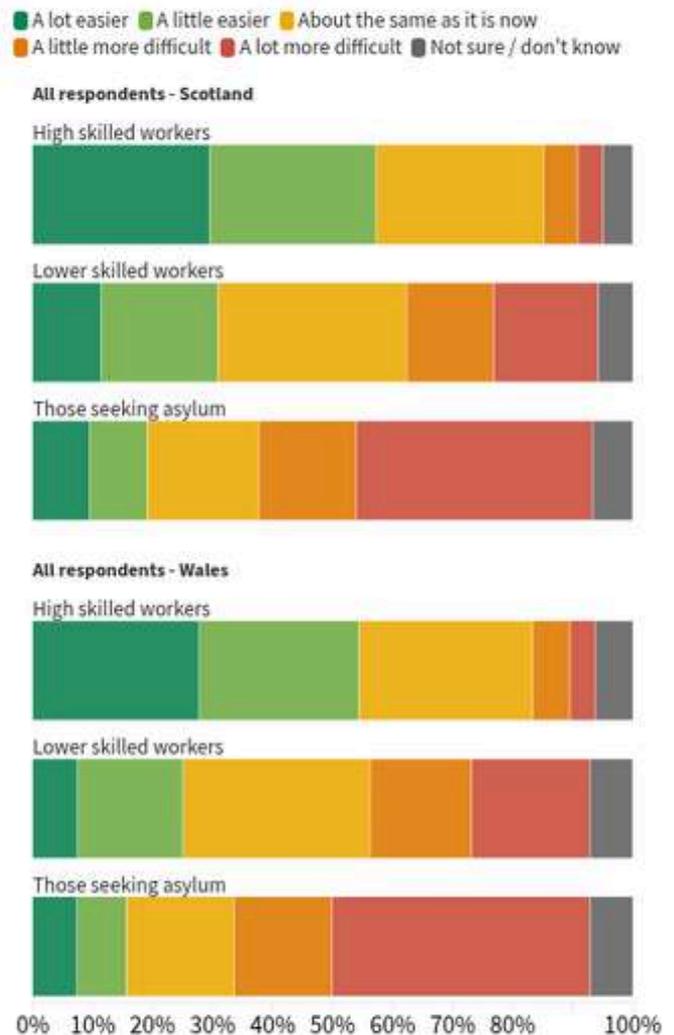
Attitudes relating to those seeking asylum are different. A majority in both Scotland (56%) and Wales (59%) think it should be made more difficult for those seeking asylum to come to the UK, compared with around one in five (19%) in Scotland and around one in six (16%) in Wales who think it should be made easier.

There is a strong correlation between attitudes to immigration and voting intention at the May 2026 Senedd and Holyrood elections. For example:

- Those intending to vote Reform UK are the most resistant to immigration. When asked about those seeking asylum, almost all respondents (93% in Scotland, 97% in Wales) said entry should be more difficult. Likewise, for lower skilled workers, more than three in five (61%; 67%) said it should be more difficult. However, the balance shifts for high skilled workers. Around two in five (39%) in Scotland, and almost half (46%) in Wales, said it should be easier (compared with 22% and 16%, respectively, who said it should be more difficult). This pattern is similar among Conservative voters.
- In contrast, those intending to vote Green in Scotland said all three forms of immigration should be made easier (78% for high skilled, 63% for lower skilled, and 62% for those seeking asylum). A similar pattern is evident in Wales when looking at those who voted Green at the 2024 UK General Election.
- Labour voters in both nations said it should be made easier for high skilled and lower skilled workers to come to the UK, but more difficult for those seeking asylum. This is also the case with Plaid Cymru voters in Wales and SNP voters in Scotland.

Demographic differences were also evident. For example, when asked about high skilled immigration, the groups most likely to say it should be made easier were: men (60% in Scotland; 58% Wales); 16-24s (69%; 70%); those with a household income of £70,000+ (68%; 64%), socioeconomic group AB (64%; 62%), and those with a degree or higher degree (63%; 64%).

**Figure 4: How easy or hard do the public think different types of immigration to the UK should be?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 For each of the following types of people looking to come to the UK, please tell us whether you think the UK should make it more difficult, make it easier, or keep it about the same level of difficulty as it is now for them to come to the UK? n = 2,707 (Scotland), n = 1,626 (Wales)

There are also strong correlations with attitudes to, and engagement with, R&D (which were explored later in the survey, the full results of which are described in later sections). For example, the groups most likely to say it should be made easier for high skilled workers to come to the UK were: those who said that R&D is a current strength of the country (71% in Scotland; 66% in Wales), those who said they know a lot or a fair amount of the R&D being undertaken in either Scotland or Wales (70%; 61%), and those who said that they can immediately think of ways that R&D benefits in either Scotland or Wales (73%; 75%).

# Awareness and understanding of R&D

## Key takeaways

- Less than half (47% Scotland; 43% Wales) said they had heard of the term “R&D” and know what it means, rising to around eight in ten (82% Scotland; 77% Wales) when “research and development” is spelled out in full. This is consistent with previous CaSE research.
- When prompted, people associate R&D with universities, charities, large businesses, and NHS hospitals, with much lower recognition of the role of small and medium sized businesses. People in Scotland associated R&D more strongly with all organisation types tested compared with their Welsh counterparts.
- Levels of knowledge about the R&D being undertaken in Scotland and Wales are very low and few currently see R&D as a national strength for either nation.
- Around half of people in both nations (54% in Scotland; 53% in Wales) said they would be interested in hearing about R&D in the run up to the Senedd and Holyrood elections in May 2026.

## Awareness of the terms “R&D” and “research and development”

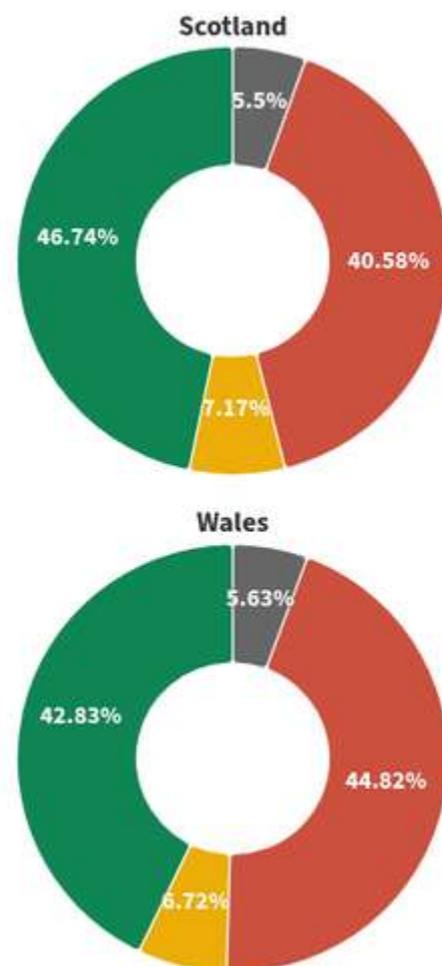
CaSE uses the term “R&D” in its public opinion research. Previous testing of various terms found that “R&D” is viewed by the public as covering the range of disciplines and organisations within our sector ([Read CaSE’s research and advice on terminology here](#)). CaSE’s polling first tests unprimed recognition and then provides a definition of R&D (see “Associations with R&D” section on next page).

Spontaneous recognition of the term “R&D” was mixed. Less than half (47% Scotland; 43% Wales) said that they have heard of it and know what it means, while a further 7% in both nations said they have heard of it but don’t know what it means. Around half (48% Scotland; 50% Wales) said they have not heard of the term R&D before or don’t know (Figure 5). This is broadly consistent with CaSE’s PARD25 study.

There are significant variations in familiarity with the term R&D across sub-groups, with the following all more likely to have heard of R&D and know what it means:

- **Gender:** Close to two in three men (66% in Scotland; 61% in Wales) compared with around three in ten women (29% in Scotland; 26% in Wales).
- **Socioeconomic group:** Almost three in five of those in group AB (58% in Scotland; 58% Wales) compared with around a third of those in group DE (34%; 33%).
- **Education:** Close to two in three of those with a degree (66% in Scotland; 59% in Wales) compared with those up to and including GCSE/O-Level or equivalent (23%; 24%).

Figure 5: How familiar are the Scottish and Welsh public with the term “R&D”?



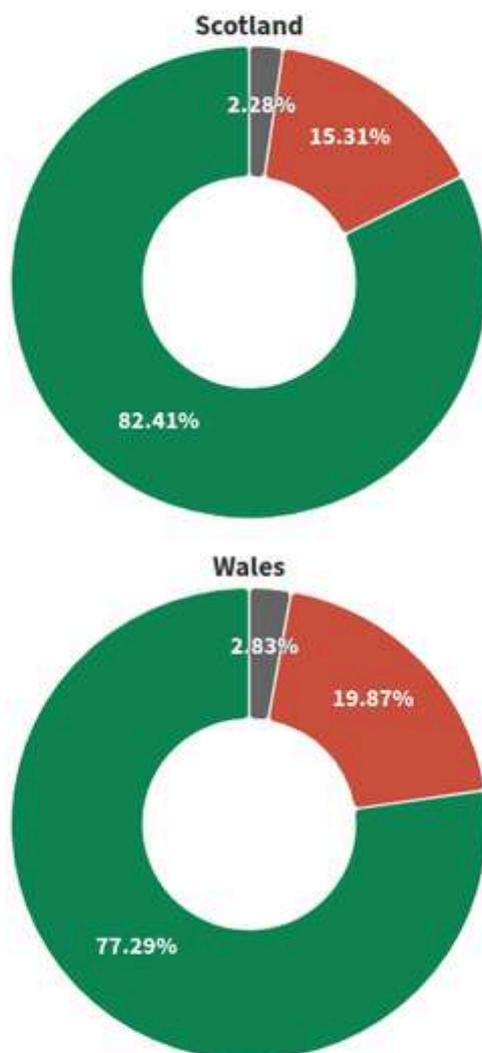
Source: YouGov and Icaro polling for CaSE • January 2026  
How familiar, if at all, are you with the term “R&D”? n = 2,707 (Scotland); n = 1,626 (Wales)

# Awareness and understanding of R&D

Awareness is broadly similar irrespective of who respondents intend to vote for in the May 2026 Senedd and Holyrood elections, with awareness only notably dropping among those not intending to vote (32% in Scotland and 30% in Wales, respectively, say they have heard of R&D and know what it means).

When presented with the full term “research and development”, recognition increases substantially - to 82% in Scotland and 77% in Wales (Figure 6), which aligns with CaSE’s PARD25 study (82% across the UK). A sizeable minority had not heard of this phrase before, being higher among women (25% in Scotland and 30% in Wales) and 16-24s (25% of 16-24s in Scotland and 34% in Wales).

**Figure 6: How familiar are the public with "Research and development"?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 "R&D" stands for Research & Development. Have you heard of this phrase before? n = 2,707 (Scotland); n = 1,626 (Wales)

## Associations with R&D

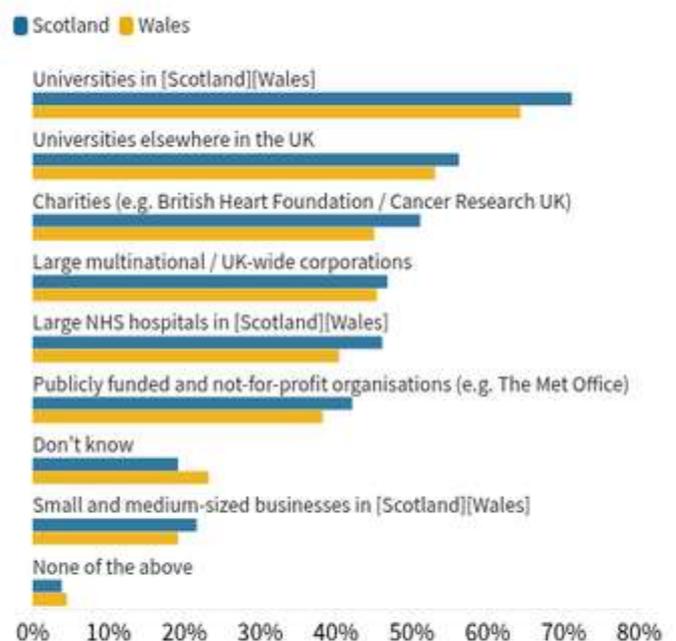
The CaSE definition of R&D was introduced in the survey once spontaneous awareness and reactions had been captured.

**Research and Development (R&D) refers to any work that aims to solve a problem or increase what we know. This includes what we know about humankind, culture and society, as well as what we know about the world around us.**

**R&D can lead to new discoveries and ideas, or the invention or improvement of products and services. In short, R&D is often the first step to creating something new.**

Once given this definition, survey respondents were prompted with a list of organisations and asked which they associate with doing, or funding, R&D (Figure 7). There were consistently higher levels of association with R&D across all organisation types in Scotland compared with Wales. Some 71% in Scotland, and 64% in Wales, said they associate R&D with universities in Scotland/Wales. This was followed by around half who said they associate R&D with charities (51%; 45%), large multinationals or large UK-wide businesses (47%; 45%) and large NHS hospitals (46%; 40%).

**Figure 7: Which organisations do the public in Scotland and Wales associate with R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 Which of the following organisations, if any, do you associate with undertaking and / or funding Research & Development? Select all that apply. n = 2,707 (Scotland), n = 1,626 (Wales)

# Awareness and understanding of R&D

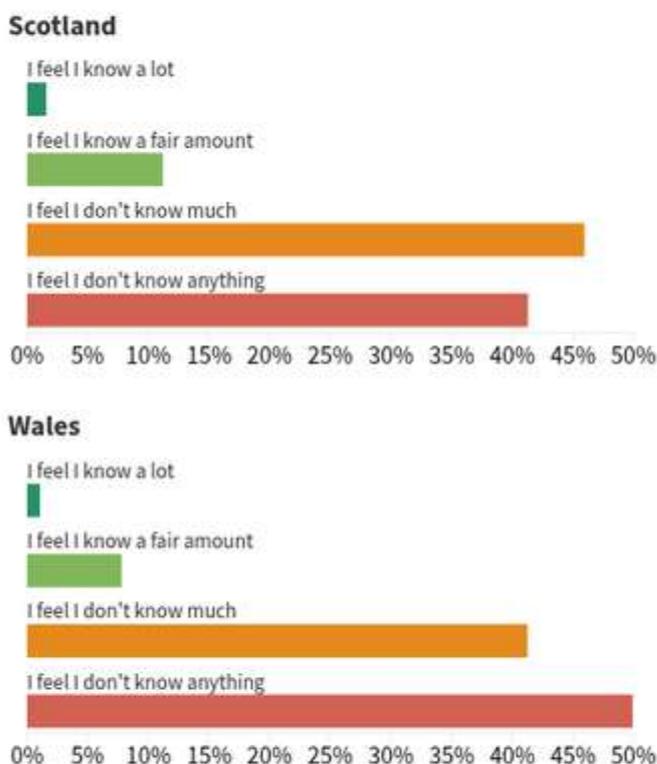
There was much lower recognition of the role of small and medium sized businesses (22%; 19%). Furthermore, a sizeable group (19% in Scotland; 23% in Wales) said they don't know if any of the organisations are associated with, or fund, R&D.

CaSE's qualitative research has consistently found significant differences in associations with universities. Focus group participants in the *PAR25* study rarely thought of universities without a prompt. Their first associations were private sector companies, with universities initially viewed as education institutions.

## Knowledge of R&D being undertaken

Levels of self-reported knowledge about the R&D being undertaken in Scotland and Wales were very low (Figure 8). Only one in 50 (2%) in Scotland – and one in 100 (1%) in Wales – said they know a lot about the R&D being undertaken in their nation. Overall, around one in eight in Scotland (13%) and around one in ten (9%) in Wales said they know a lot or a fair amount.

**Figure 8: How much do the public know about R&D being done in their nation?**



Source: YouGov and Icaro polling for CaSE • January 2026  
Which of the following best describes how much you feel you know about the Research & Development being done in Wales? n = 2,707 (Scotland); n = 1,626 (Wales)

There are some sub-group differences, with the following groups most likely to say they know a lot or fair amount about R&D: Men (17% in Scotland; 12% in Wales); socioeconomic group ABs (19%; 17%); those with a household income of £70,000+ (22%; 17%); those with an undergraduate or higher degree (21%; 15%); those living in a city (16%; 12%); those in Lothians region (19%) and those in Cardiff (13%).

There are some differences by voting intention at the May 2026 Senedd and Holyrood elections, with those intending to vote SNP, Green, and Liberal Democrat in Scotland (17%, 17%, and 16%), and Plaid Cymru and Labour voters in Wales (14% and 17%) most likely to say they know a lot or a fair amount. Those intending to vote Reform UK are somewhat less likely to say they know about R&D being undertaken (9% in Scotland; 8% in Wales), as are those who don't intend to vote (4%; 6%).

The strongest correlations are with attitudes to, and connection with, R&D. Awareness of R&D in Scotland and Wales is highest among those who said they feel connected with R&D (50% in Scotland; 30% in Wales); those who said they can immediately think of lots of ways that R&D benefits their nation (39%; 29%), and those who think R&D is currently a national strength of their nation (37%; 40%).

## Perceptions of R&D as a national strength

Few currently see R&D as a national strength for either Scotland or Wales, with the figures notably lower in Wales. In Scotland, close to one in five (19%) said that R&D is a current strength, and a similarly sized group (22%) said it used to be but isn't anymore. This compares to 8% and 10%, respectively, in Wales. In both nations the dominant answer was 'don't know' (43% in Scotland; 48% in Wales).

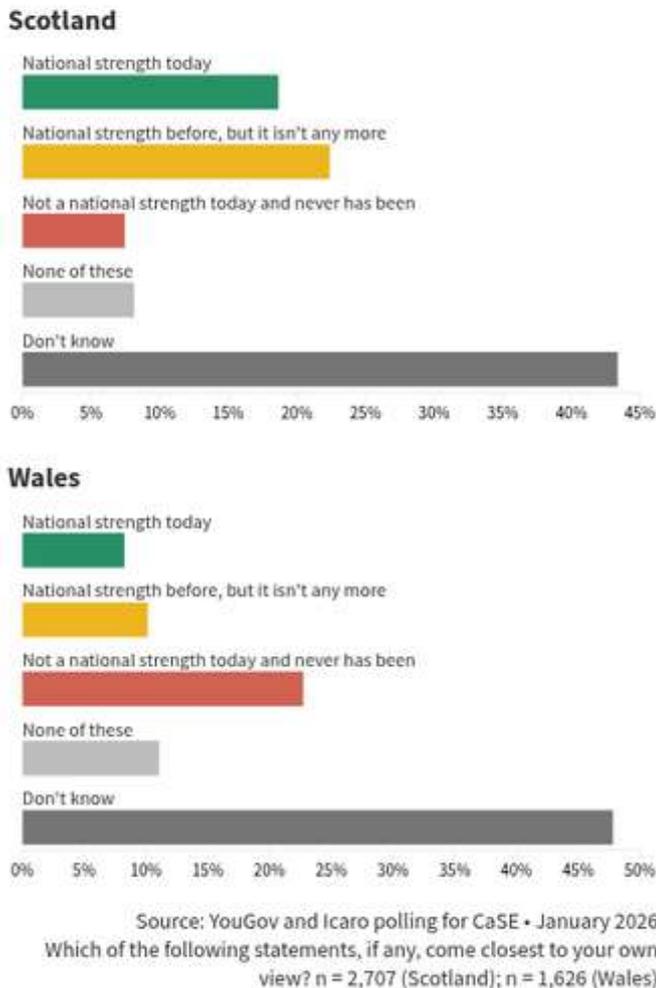
There are relatively few correlations by demographics, but the differences that exist are by:

- **Socioeconomic group:** Those in group AB are more likely to say it is a current strength compared to those in group DE (25% of ABs compared with 16% of DEs in Scotland; 13% compared with 7% in Wales).
- **Highest educational achievement:** Those with a degree or higher are more likely to say R&D is a current strength compared to those with GCSE/O-Levels or equivalent (24% for degree of higher compared with 13% for GCSE/O-Levels or equivalent in Scotland; 11% compared with 4% in Wales).

# Awareness and understanding of R&D

- **Gender:** Men in Scotland are more likely to say R&D is a current strength (22% of men compared with 16% of women). This trend is not seen in Wales (8%; 8%).

**Figure 9: Do the public think R&D is a national strength?**

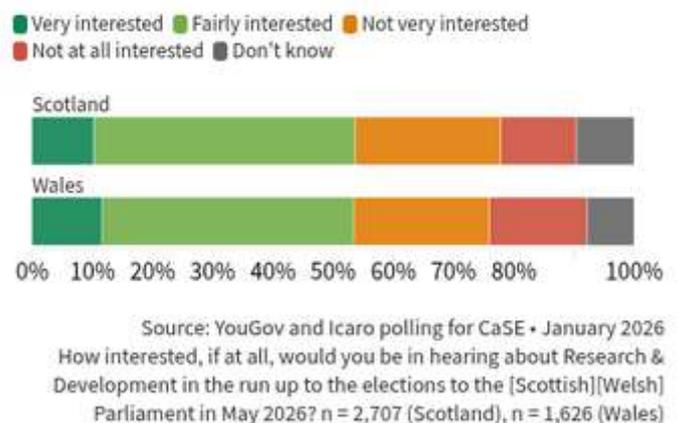


The strongest correlations are according to knowledge of, and connection with, R&D. More than half (54%) of those in Scotland and more than a third (37%) in Wales who say they know a lot or a fair amount about the R&D being undertaken in their nation say that R&D is a current strength of the country today. Similarly, more than two in five (43%) of those in Scotland who feel connected to R&D think it is a current strength of the country, which is also seen to a lesser extent in Wales (23%).

## Interest in hearing about R&D ahead of the May 2026 elections

The survey suggests there is strong, although not universal, appetite in both Scotland and Wales to know more about R&D. When asked if they would be interested in hearing about R&D in the run up to the May 2026 Senedd and Holyrood elections, more than half in both nations (54% in Scotland; 53% in Wales) said they would be very or fairly interested (Figure 10). A sizeable proportion of close to two in five (37%; 39%) said they would not be interested, and close to one in ten (10%; 8%) said they don't know.

**Figure 10: How interested are the public in hearing about R&D ahead of the May 2026 elections?**



There are also differences by voting intention at the May 2026 Senedd and Holyrood elections (references to 'voters' below reflect voting intention except when specified):

- Reform UK voters are less likely – in both Scotland and Wales – to think that R&D is a national strength of the country (9% in Scotland and 3% in Wales), as are those who do not intend to vote (4% in Scotland and 5% in Wales).
- In Scotland, SNP and Green voters are most likely to see R&D as a strength (32% and 28%, respectively).
- In Wales, Labour and Plaid Cymru voters are most likely to see R&D as a strength (18% and 14%, respectively).

There is a broad level of interest across respondents, irrespective of who they intend to vote for at the May 2026 Senedd and Holyrood elections. In Scotland, this ranged from 68% of those intending to vote Green and 66% of those intending to vote SNP voters, to 46% of those intending to vote Reform UK. In Wales it ranged from 71% of those intending to vote Plaid Cymru to 47% of those intending to vote Reform UK. The only group that are largely disinterested were those who do not intend to vote (only 24% of this group in Scotland, and 16% in Wales, are interested in hearing more about R&D in the run up to the elections).

# Benefits of R&D

## Key takeaways

- Only around one in ten (11% in Scotland; 9% in Wales) said they can immediately think of lots of ways that their nation benefits from R&D, falling even further when asked about benefits to their local area (7% in Scotland; 6% in Wales) or them and their family (7% in Scotland; 5% in Wales).
- A minority said that R&D makes a very or fairly big contribution to the economy in Scotland (32%) and Wales (18%). The largest group (40% in Scotland; 46% in Wales) said they don't know if it contributes or not.
- Just over one in three said that R&D was relevant to their life (38% in Scotland; 35% in Wales). Far fewer (15% in Scotland; 16% in Wales) said they feel connected with R&D.

## Recognition of benefits from R&D

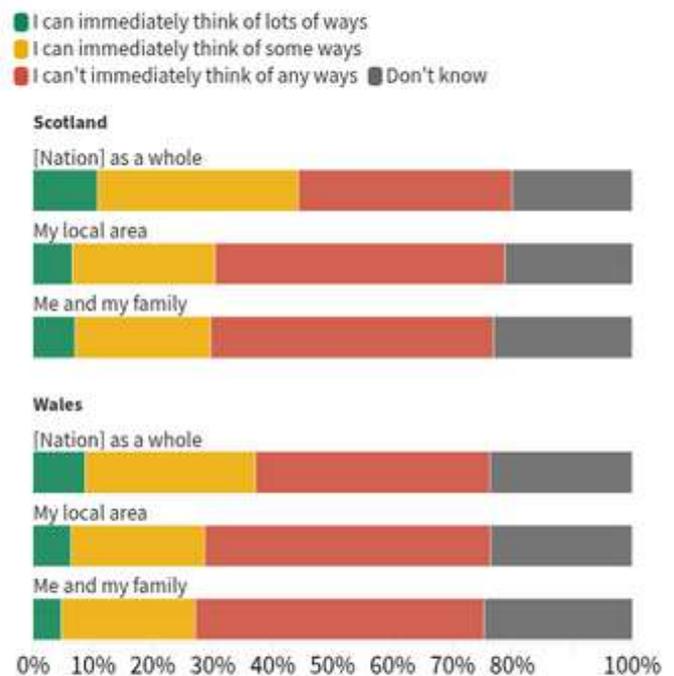
Respondents struggled to immediately identify the benefits of R&D, whether for themselves, their local area, or Scotland or Wales as a whole (Figure 11). Only around one in ten (11% in Scotland; 9% in Wales) said they can immediately think of lots of ways that Scotland or Wales benefits from R&D carried out in that nation. A more sizeable group said they can think of some ways (34%; 28%), but the largest group said they can't think of any ways (36%; 39%) or don't know (20%; 24%).

The pattern is repeated, but even more acute, for personal benefits. Less than one in ten (7% in Scotland and 5% in Wales) say they can immediately think of lots of ways that they or their family benefits. Around one in five say they can think of some ways (23%; 22%), while almost half say they can't think of any ways (47%; 48%), and around a quarter don't know (23%; 25%).

The proportions of people who can immediately think of national, local or personal benefits of R&D are lower than were observed for a similar question in *CaSE PARD25* (for instance, 21% of people in Scotland could immediately think of ways that R&D benefits their nation; 18% in Wales). However, comparisons need to consider that the question in this survey was phrased differently. First, the question referred to R&D undertaken in the relevant nation rather than in the UK. Second, this question included 'don't know' as an option rather than forcing a choice between the three options.

There are significant variations according to demographics. The groups more likely to identify at least some benefits to them/their family are those in socioeconomic group AB (38% in Scotland; 39% in Wales); those with a household income of £70,000+ (41%; 40%); those with an undergraduate or higher degree (40%; 41%) and 16-24s (38%; 34%).

**Figure 11: To what extent can the public think of ways that R&D benefits different people and parts of their nation?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 To what extent can you immediately think of ways that Research & Development activity undertaken in Wales benefits each of the following? n = 2,707 (Scotland), n = 1,626 (Wales)

There are also clear differences by voting intention at the May 2026 Senedd and Holyrood elections. In Scotland, recognition of personal benefits is higher among those intending to vote Green (41% said they could think of at least some ways), Liberal Democrat (39%), SNP (35%), and Labour (34%). It is lower among those intending to vote Reform UK (23%) and those not intending to vote (19%). In Wales, it is higher among those intending to vote Labour (41%) and Plaid Cymru (37%), and lower among Reform UK (24%) and those not intending to vote (15%).

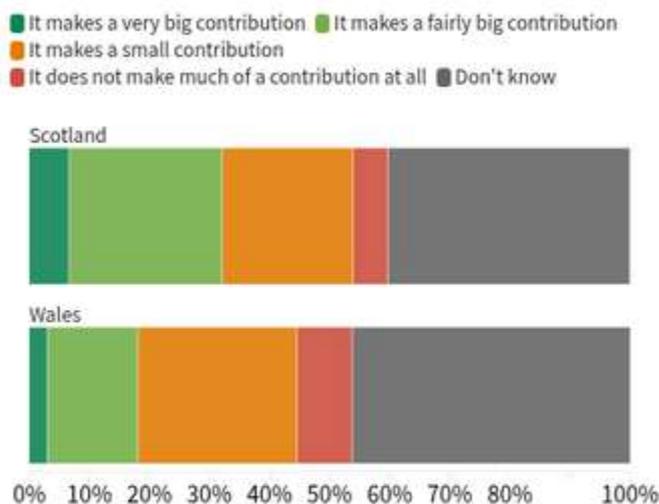
## Benefits of R&D

Attitudes to, and connection with, R&D correlate strongly. Those who feel connected to R&D were the most likely to recognise personal benefits (69% in Scotland; 60% in Wales said they could think of at least some ways), as were those who say R&D is relevant to their life (52%; 47%), and those who think that R&D is currently a strength of the country (62%; 60%).

### Contribution to the economy

Only a minority said that R&D makes a “very” or “fairly” big contribution to the economy in Scotland and Wales, respectively (Figure 12). In Scotland this minority is sizeable (32%), whereas in Wales it is much smaller (18%). The largest group (40% in Scotland; 46% in Wales) said they don't know if it contributes or not.

**Figure 12: How much of an economic contribution do the public think R&D makes?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 To what extent, if at all, do you think that Research & Development in [Scotland]/[Wales] makes a contribution to the country's economy? n = 2,707 (Scotland), n = 1,626 (Wales)

There are significant variations according to demographics. The groups more likely to think that R&D makes a very or fairly big contribution to the economy are those in socioeconomic group AB (42% in Scotland; 29% in Wales), those with a household income of £70,000+ (45%; 29%); those with an undergraduate or higher degree (42%; 24%); and those who live in the regions of Lothians in Scotland (40%) and Cardiff in Wales (26%).

There is a trend by gender in Scotland only, with men more likely to perceive a contribution (37% compared to 27% of women); while there is a trend in Wales by age, with 16-24s more likely to perceive a contribution (32% compared to 14% of those aged 65+).

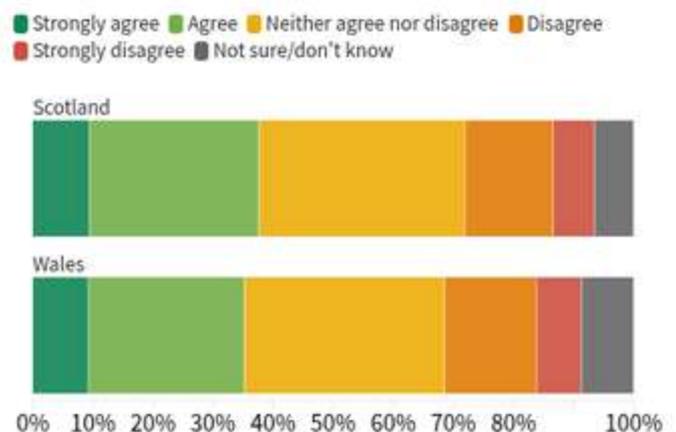
There are clear differences by voting intention at the May 2026 Senedd and Holyrood elections, which follow the same pattern seen with questions related to recognition of local or personal benefits of R&D, where those intending to vote Reform UK in each nation are less likely to perceive R&D as making an economic contribution.

Attitudes to, and connection with, R&D also correlate strongly, with perceptions of R&D's contribution to the nations' economy higher among those who think that R&D is currently a strength of the country, those who feel they know a lot or a fair amount about R&D in Scotland and Wales and those who say R&D benefits them personally.

### Perceived relevance of and connection to R&D

Few people feel a personal connection with R&D. Only a minority of around one in three (38% in Scotland; 35% in Wales) said that R&D is relevant to their life (Figure 13). This broadly aligns with the results from CaSE's PARD25 study (40% in Scotland; 41% in Wales).

**Figure 13: How relevant do the public think R&D is to their lives?**

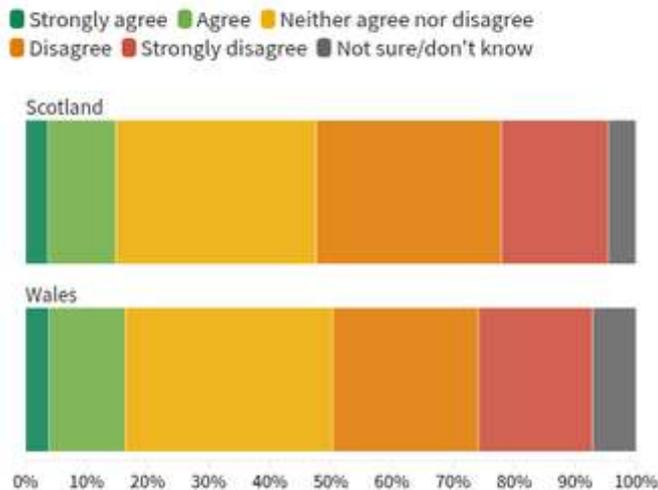


Source: YouGov and Icaro polling for CaSE • January 2026  
 Do you agree or disagree with the following statements. R&D is relevant to my life n = 2,707 (Scotland), n = 1,626 (Wales)

## Benefits of R&D

In the 2026 polling, far fewer (15% in Scotland; 16% in Wales) said they feel connected with R&D in the form of a personal interest or actively seeking out R&D news and activities (Figure 14), which is significantly lower than the results observed in *PARD25* (23%; 25%).

**Figure 14: How connected do the public in Scotland and Wales feel with R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026

Do you agree or disagree with the following statements. I feel connected with R&D - I have a personal interest and actively seek out R&D news and activities n = 2,707 (Scotland), n = 1,626 (Wales)

For the statement 'R&D is relevant to my life', the groups more likely to agree are socioeconomic group AB (49% in Scotland; 55% in Wales), those with a household income of £70,000+ (59%; 56%), those with an undergraduate or higher degree (55%; 54%), men (42%; 39%), those in Lothians region in Scotland (46%), and those in Cardiff in Wales (43%).

There are clear differences by voting intention at the May 2026 Senedd and Holyrood elections. In Scotland, those intending to vote Green, Liberal Democrat, and SNP are more likely to think R&D is relevant their life (49%, 45%, and 42%, respectively), compared with those intending to vote Reform UK (32%) and those not intending to vote (24%). In Wales, those intending to vote Labour (45%) and Plaid Cymru (44%) are more likely to perceive it as relevant to their life, compared to those intending to vote Reform UK (30%) and those not intending to vote (22%).

Attitudes to, and connection with, R&D correlate strongly. Those who think that R&D is currently a strength of the country are significantly more likely to perceive that R&D is relevant to their life (63% in Scotland; 67% in Wales) compared with those who don't think it has ever been a strength (30%; 41%). Those who feel they know a lot or a fair amount about R&D in Scotland and Wales are also much more likely to think R&D is relevant to them (77%; 74%), as are those who say R&D benefits them personally (74%; 66%).

# R&D and place

## Key takeaways

- Around half of people (53% in Scotland; 49% in Wales) would support a new R&D laboratory in their local area, while close to two in three (65% in both Scotland and Wales) would support a new science museum or discovery centre.
- A majority of around three in five (66% in Scotland; 59% in Wales) would feel proud if their area were to become well known as an important hub for R&D in Wales or Scotland.

## Support for different kinds of R&D locally

Around half (53% in Scotland; 49% in Wales) said they would support a new R&D laboratory in their local area, compared with only around one in ten (9% Scotland; 10% Wales) who would oppose it (Figure 15). A large group of around three in ten (30%; 31%) said they would neither support nor oppose, while close to one in ten (8%; 9%) don't know. This is broadly consistent with the findings UK-wide in CaSE's PARD25 study, which also found strong support mixed with some apathy, but little opposition.

Support for a new business park is lower, at 41% in both Scotland and Wales, with more respondents opposed (21%; 23%). The option that attracted the most support is a new science museum or discovery centre – close to two in three (65% in both Scotland and Wales) said they would support this compared with just 8%, in both nations, who would oppose it.

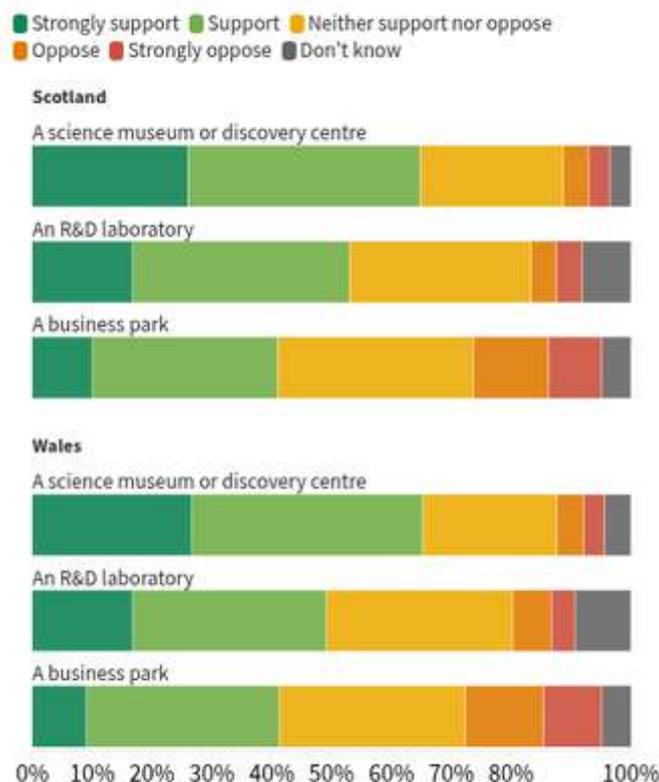
There are pronounced differences according to demographics. For a new R&D laboratory, the groups more likely to be supportive are men (61% in Scotland; 57% in Wales), socioeconomic group AB (62%; 66%), those with a household income of £70,000+ (69%; 65%), those with an undergraduate or higher degree (63%; 66%), and – in Scotland – those in Lothians region (59%).

There are significant differences according to voting intention at the May 2026 Senedd and Holyrood elections. In Scotland, support for an R&D laboratory is highest among those intending to vote Green (68%), Liberal Democrat (62%) or SNP (61%), and lower among those intending to vote Reform UK (43%) and those who say they will not vote (45%). Levels of opposition range from the very low (2% among Green voters; 3% Liberal Democrat; 6% for both Labour and the SNP) to 10% among Conservative voters and 17% among Reform UK.

In Wales, support is highest among those intending to vote Labour (72%) and Plaid Cymru (61%), and similarly lower among those intending to vote Reform UK (42%) and those who don't intend to vote (30%). Levels of opposition range from 2% among intending Labour voters and 5% of Plaid voters, to 13% and 14%, respectively, of Conservative and Reform UK voters.

Attitudes towards, and connection with, R&D correlate strongly. For example, those who think that R&D is currently a strength of the country are significantly more likely to support an R&D laboratory in their area (78% in Scotland; 80% in Wales) compared to those who don't think it has ever been a strength (45% in Scotland; 59% in Wales).

**Figure 15: Do the public support the building of new R&D facilities locally?**



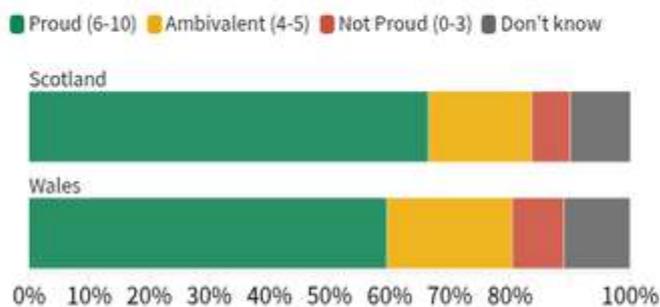
Source: YouGov and Icaro polling for CaSE • January 2026  
 Would you support or oppose each of the following being built in your area? n = 2,707 (Scotland), n = 1,626 (Wales)

## R&D and place

### R&D as a source of local pride

The survey posed a hypothetical scenario to respondents that in five years' time their area becomes well known as an important hub for R&D in Wales or Scotland, with it noted that the area had stayed much the same apart from this. They were asked if this would make them proud of their area or not, answering on a scale of 0 to 10 (where 0 is "not at all proud" and 10 is "extremely proud"). The results demonstrate that a strong majority of around three in five (66% in Scotland; 60% in Wales) said they would feel proud of their area, i.e. scoring 6 or more out of 10 (Figure 16).

**Figure 16: How proud would the public be if their area became well known for R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026

Please imagine that in five years' time, your [city / town / village] has become well known as being an important hub for Research & Development in Wales. The area has stayed much the same apart from this. On a scale of 0 to 10 (where 0 is "not at all proud" and 10 is "extremely proud") how proud, if at all, would you feel about your [city / town / village]? n = 2,707 (Scotland), n = 1,626 (Wales)

The demographic groups more likely to express pride are socioeconomic group AB (73% in Scotland; 74% in Wales), those with a household income of £70,000+ (78%; 82%), those with an undergraduate or higher degree (75%; 73%), 16-24s (71%; 74%), and those in a city (72%; 66%).

There are also notable differences according to voting intention at the May 2026 Senedd and Holyrood elections.

In Scotland, those intending to vote Green are the most likely to say they would be proud (79%), followed by those intending to vote SNP, Liberal Democrat and Labour (76%, 76% and 73%, respectively). Somewhat fewer – but still over half (57%) – of those who intend to vote for Reform UK say they would be proud. Those least likely to be proud are those who say they are not intending to vote (43%).

In Wales, Labour voters are most likely to say they would be proud (79%), compared with around half (52%) of Reform UK voters and only 31% of those who do not intend to vote.

Knowledge and existing connections with R&D are, once again, strongly correlated with anticipated levels of pride. For example, 88% in Scotland and 84% in Wales of those who can immediately think of lots of ways that the country benefits from R&D say that they would be proud of their area if it became an R&D hub.

# Universities and research organisations

## Key takeaways

- Most people in both Scotland and Wales think it is important for universities and research organisations to carry out a range of R&D-related activities, with 90% and 88% thinking it is important these organisations help build a highly skilled workforce for Scotland and Wales, respectively.
- However, there are mixed views on how effective universities and research organisations are at delivering these activities, with a sizeable group saying they don't know for each activity.
- At least half think that universities and research organisations are effective at producing high quality research outputs (59% say they are very or fairly effective in Scotland; 50% in Wales).
- These findings align with CaSE's wider qualitative research, which shows that many participants are initially unsure of universities' role in research.

## The role of universities and research organisations

A strong majority in both Scotland and Wales think that it is important that universities and research organisations carry out various aspects of R&D (Figure 17). Respondents were asked how important it was for universities and research organisations to do each of a list of activities, and each was seen as at least fairly important by a majority of respondents in both nations. The activity perceived as the most important was helping to build a highly skilled workforce (which 90% in Scotland and 88% in Wales said was very or fairly important).

There is a broad consensus across the spectrum of voters. The only difference of note is that a minority of those intending to vote Reform UK (26% in Scotland; 28% in Wales) are more likely to say that it is not very, or not at all, important for universities and research organisations to attract international researchers.

While the survey results demonstrate that respondents believe it is important for universities and research organisations to carry out these activities, a separate question revealed mixed views on how effective they were in delivering these activities (Figure 18). This latter question asked respondents how effective or ineffective universities and research organisations were at doing the same set of activities.

In Scotland, more than half think that universities and research organisations are effective at four of the seven activities: producing high quality research outputs (59% say they are very or fairly effective), helping to build a highly

skilled workforce for Scotland (54%), attracting talented researchers from around the world (53%), and collaborating with businesses to develop partnerships (50%).

In Wales, the picture is less positive, with "producing high quality research outputs" the only activity that at least half (50%) think universities and research organisations do effectively.

The aspect that universities and research organisations are felt to be most ineffective at is communicating, engaging and involving the public in their research, with around three in ten (31% in both Scotland and Wales) saying they are ineffective at this, compared with around four in ten who think they are effective at it (43%; 41%).

However, a sizeable group – across all the areas - say they don't know. This echoes the findings of CaSE's *PARD25* study, where many thought of universities as primarily education institutions.

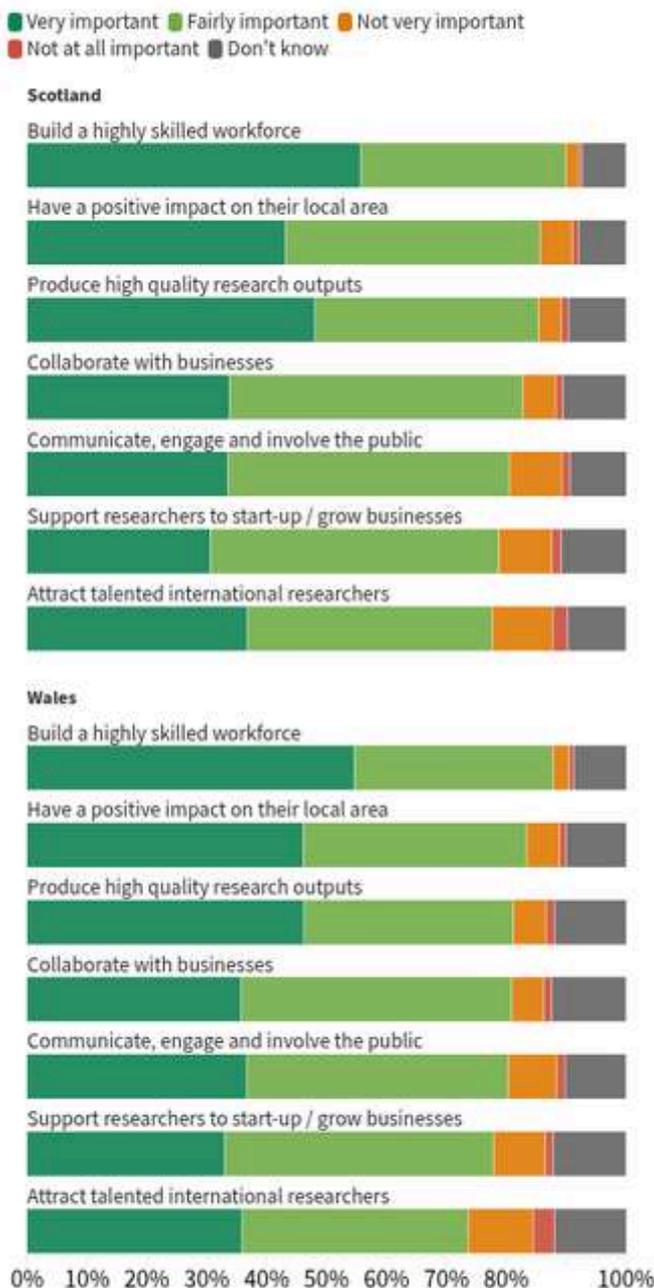
There are some differences according to voting intention at the May 2026 Senedd and Holyrood elections.

- In Scotland, those intending to vote Labour, SNP, and Liberal Democrat were the most likely to say that universities and research organisations are effective, with those intending to vote Conservative and Reform UK somewhat less so. In this instance, those intending to vote Green were closer to Conservative and Reform UK voters, which is notably one of the only times this was seen across the study.

# Universities and research organisations

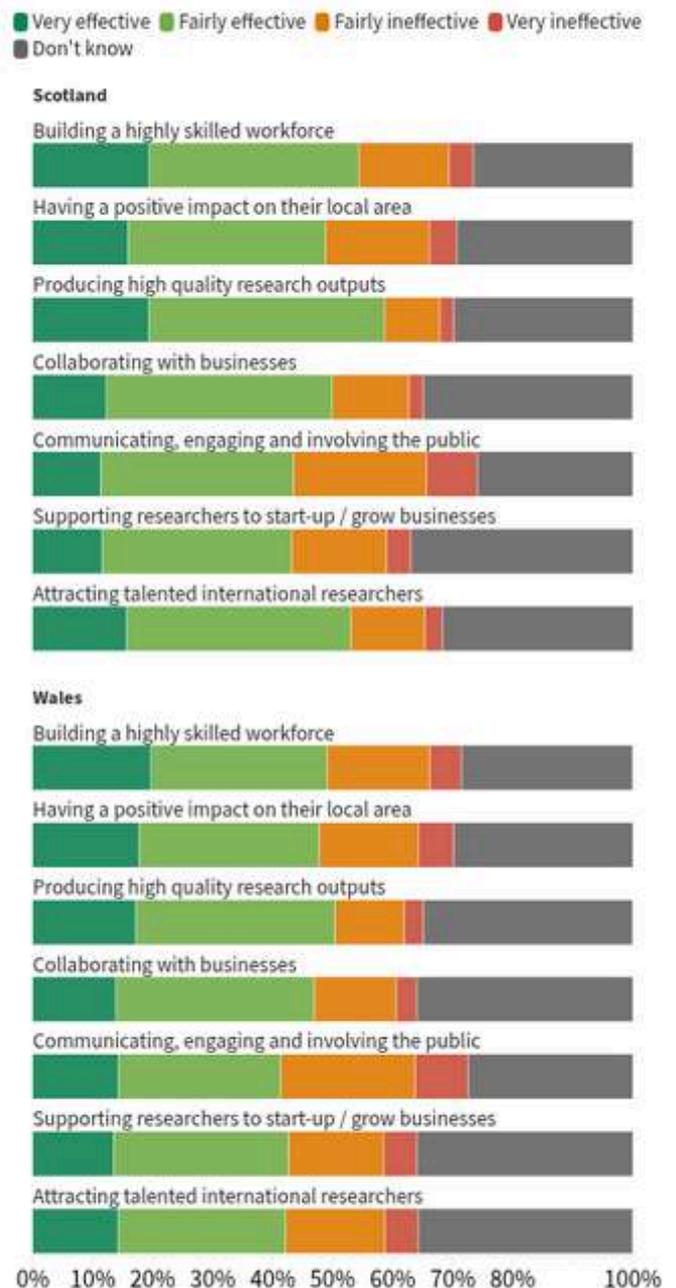
- In Wales, a similar trend is evident with higher effectiveness ratings from those intending to vote Labour and Plaid Cymru, and somewhat lower effectiveness ratings among those intending to vote Conservative and Reform UK.
- The lowest effectiveness ratings – in both Scotland and Wales - come from those who said they do not intend to vote (which, in this instance, reflects a higher proportion of ‘don’t know’ answers rather than ‘ineffective’ ratings).

**Figure 17: How important do the public think it is for universities and research organisations to do R&D-related activities?**



Source: YouGov and Icaro polling for CaSE • January 2026  
How important, if at all, do you think it is for universities and research organisations in [Scotland][Wales] to do each of the following? n = 2,707 (Scotland), n = 1,626 (Wales)

**Figure 18: How effective do the public think universities and research organisations at doing R&D-related activities?**



Source: YouGov and Icaro polling for CaSE • January 2026  
And how effective or ineffective do you think universities and research organisations in [Scotland][Wales] are at the following? n = 2,707 (Scotland), n = 1,626 (Wales)

# Investing in R&D

## Key takeaways

- Around three quarters think it is important for their devolved government to invest in R&D in their nation (77% in Scotland and 72% in Wales), and this majority support (66-87%) extends across all voter groups.
- Half of people in Scotland (55%) and Wales (50%) said the amount their devolved government invests in R&D should either be increased or maintained.
- In both nations, the highest priority for additional public R&D investment was in advances in medical research to improve diagnosis, treatment and support, while extra public investment in AI advances was the lowest priority.
- Specific examples of the economic impact of R&D activity in Scotland and Wales appears to increase support for R&D investment and reduce uncertainty.
- A majority in each nation think that it should be a priority for their devolved government to support R&D in universities, research organisations and businesses in a range of ways.

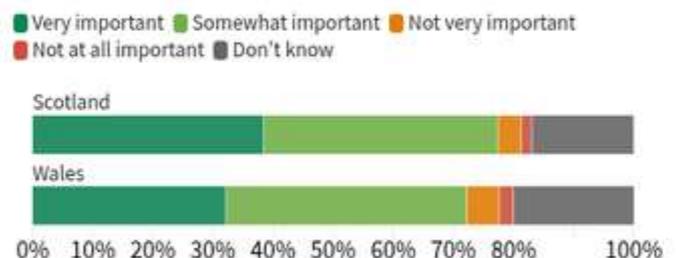
## Support for Scottish and Welsh Government investment in R&D

Around the mid-point of the survey, respondents were asked the question “How important, if at all, do you think it is for the Scottish/Welsh Government to invest in Research & Development in Scotland/Wales?”. The aim was to understand intrinsic support for their devolved government supporting R&D. As such, respondents were not provided with an explanation of the extent to which R&D funding, and decisions about it, are devolved.

The results demonstrate strong support for the principle of Scottish or Welsh government funding for R&D (Figure 19). Around three quarters (77%) in Scotland, and seven in ten (72%) in Wales, say it is very or somewhat important for the respective governments to invest money in R&D in their nation. By contrast, a minority (6% in Scotland; 7% in Wales) say it is not important, and a much larger group say they don't know (17%; 20%).

Majority support for the principle of Scottish or Welsh government investment in R&D extends across all sub-groups – with the sole exception of those in Wales who say they do not intend to vote in the May 2026 Senedd elections, where support falls to 47% and ‘don't know’ responses increase to 44%. The equivalent figure in Scotland, among those not intending to vote, is 62% support.

**Figure 19: How important is devolved government investment in R&D to the public?**



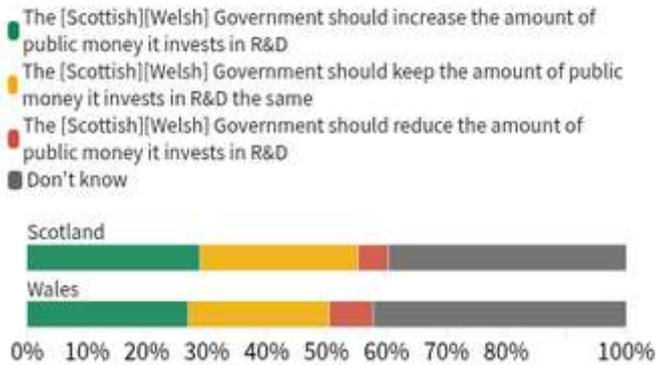
Source: YouGov and Icaro polling for CaSE • January 2026  
 How important, if at all, do you think it is for the [Scottish][Welsh] Government to invest in Research & Development in [Scotland] [Wales]? n = 2,707 (Scotland), n = 1,626 (Wales)

The survey then explored respondents’ attitudes to their nation’s government decreasing, maintaining or increasing public R&D spending in Scotland and Wales. (Respondents were not informed of the amount the Scottish or Welsh governments invest in R&D.)

Relative to their own perceptions about the existing spend of the Scottish and Welsh Governments on R&D, around half in Scotland (55%) and Wales (50%) said the amount should either be increased (29%; 27%) or maintained at the current level (26%; 23%). Only a small minority (5%; 7%) think the amount should be reduced, while a much larger group of around two in five (40%; 42%) said they don't know (Figure 20).

# Investing in R&D

**Figure 20: Does the public want the Scottish and Welsh governments to increase, maintain, or reduce public investment in R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 Do you think the [Scottish][Welsh] Government should increase, reduce, or keep at the same level the amount of public money it invests in Research & Development in [Scotland][Wales]? n = 2,707 (Scotland), n = 1,626 (Wales)

When grouped by voting intention at the May 2026 Senedd and Holyrood elections, we see broad consensus on the need to maintain or increase R&D spend in each nation – ranging in Scotland from 51% (those intending to vote Reform UK) to 68% (those intending to vote Liberal Democrat), and in Wales from 47% (those intending to vote Reform UK) to 64% (those intending to vote Plaid Cymru). The least supportive of maintaining or increasing investment – in both nations – are those who do not intend to vote (42% in Scotland and 30% in Wales).

The demographic groups that were more likely to say that R&D funding should be increased or maintained are men (64% in Scotland; 56% in Wales), socioeconomic group AB (62%; 65%), those with a household income of £70,000+ (64%; 62%), and those with an undergraduate or higher degree (63%; 61%). In Scotland, it is also higher among those in Lothians region (60%). In Wales, it is significantly higher among 16-24s (62%).

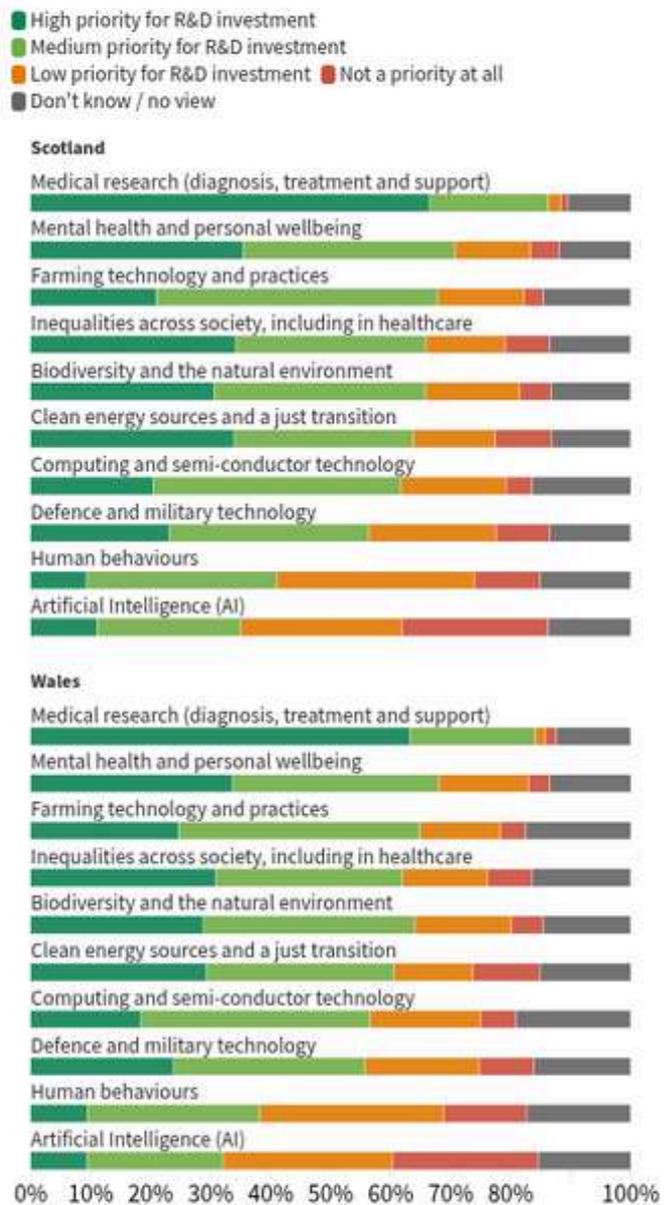
The strongest correlations are associated with existing levels of knowledge of, and positive sentiments towards, R&D. For example, there is greater support for investment being maintained or increased among:

- Those who feel connected with R&D (81% in Scotland and 79% in Wales, compared with 50% and 40%, respectively, who do not feel connected).
- Those who think that R&D makes a very big of fairly big contribution to the Scottish or Welsh economy (83% in Scotland and 77% in Wales, compared with 27% and 29%, respectively, who don't know).

## Areas for additional investment

The survey asked respondents where they would prioritise additional public investment in R&D, from a predetermined list (Figure 21). There was a clear preference for investing medical research to improve diagnosis, treatment and support in both Scotland and Wales (86% in Scotland and 84% in Wales select this as either high or medium priority).

**Figure 21: How much of priority should different types of R&D be for extra public funding?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 If extra public funding was made available to invest in Research & Development in [Scotland][Wales], how much of a priority do you think each of the following areas of Research & Development should be for this additional funding? n = 2,707 (Scotland), n = 1,626 (Wales)

## Investing in R&D

There are then seven options that are selected as high or medium priorities by more than half of respondents in both nations, and these are ranked in almost the same order. These are improving people's mental health and personal wellbeing (71% in Scotland and 68% in Wales), modernising farming technology and practices (68%; 65%), tackling inequalities across society, including access to health services (66%; 62%), protecting biodiversity (66%; 64%), cleaner energy sources (64%; 61%), advances in computing and semi-conductor technology (62%; 56%), and advances in defence and military technology (56%; 55%).

By contrast, fewer prioritise extra public investment into advances in AI (selected as a high or medium priority by 35% in Scotland and 32% in Wales), or into understanding human behaviours (41%; 38%).

There were notable differences in prioritisation according to voting intention at the May 2026 Senedd and Holyrood elections. Those intending to vote:

- Reform in both nations would prioritise investment in defence and military technology and farming technology, but are much less likely to prioritise tackling inequalities and understanding human behaviour.
- Green in Scotland would prioritise R&D into cleaner energy, biodiversity, and mental health, and are much less likely to prioritise defence and military technology.
- Conservative are less likely to identify any options as priority issues, with the exception of defence and military technology and farming technology.
- SNP and Labour in Scotland - and Plaid Cymru and Labour in Wales - were very similar in their profile of priorities for R&D investment, with the exception of defence and military technology; Labour voters in both nations were more likely to identify this as a priority.

### Investment in R&D activities

Evidence from across the sector, including the findings from qualitative research in CaSE's PARD25 study, shows the power of tangible, local examples to help ground R&D and build connections with the public.

For the final set of questions, at the end of the survey (where the examples given would not prime any subsequent responses), respondents were given three examples of the economic impact of R&D in their nation. These examples, which were based on published evidence and consultation with the sector, were as follows:

#### Scotland

- The Scottish higher education sector, which includes universities, collectively undertakes almost £2 billion of R&D activity each year and employs more than 23,000 people in R&D roles. For every ten jobs created through university research funding, an additional four jobs are created in the wider Scottish economy.
- There are around 1,560 active companies that were set up based on Scottish university research, which employ around 7,250 people and generate £410 million for the economy.
- The pharmaceutical industry is a significant contributor to the Scottish economy, with a total turnover for pharmaceuticals manufactured in Scotland of £1.65 billion in 2022. The Scottish wide pharmaceutical sector directly contributes over £1.1 billion to the Scottish economy and provides over 5,900 jobs in Scotland.

#### Wales

- The Welsh higher education sector, which includes universities, collectively undertakes almost £600 million of R&D activity each year and employs more than 12,000 people in R&D roles. For every ten jobs created in a Welsh university, an additional nine jobs are created in the wider Welsh economy.
- There are around 2,500 active companies that were set up based on Welsh university research, which employ around 5,000 people and generate £250 million for the economy.
- The compound semiconductor cluster in South Wales is a significant contributor to the Welsh economy, with the total value of exports from the cluster estimated to be over £460 million in 2024. That same year, the compound semiconductor cluster directly contributed £255 million to the Welsh economy and provided over 1,806 jobs in Wales.

# Investing in R&D

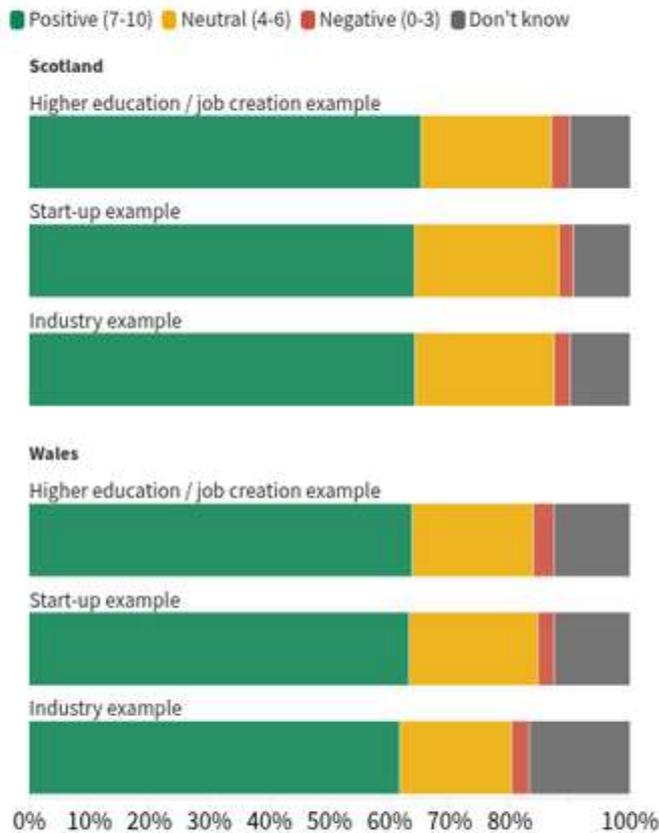
For each case study, respondents were asked two things:

1. How positively or negatively they felt about the activity being undertaken in each nation (on a scale of 0-10 where 0 = completely negative and 10 = completely positive)
2. Whether they would personally like to see the Scottish or Welsh Government, considering all the other spending priorities they have, invest more, less or the same in this kind of activity in future.

It is important to note that examples were intended to be reflective of the kinds of R&D being undertaken in Wales and Scotland, as opposed to three definitive case studies.

Sentiment was consistently positive towards all three examples, in both Scotland and Wales. Close to two in three felt positively, scoring 7-10 out of 10, for each (Figure 22).

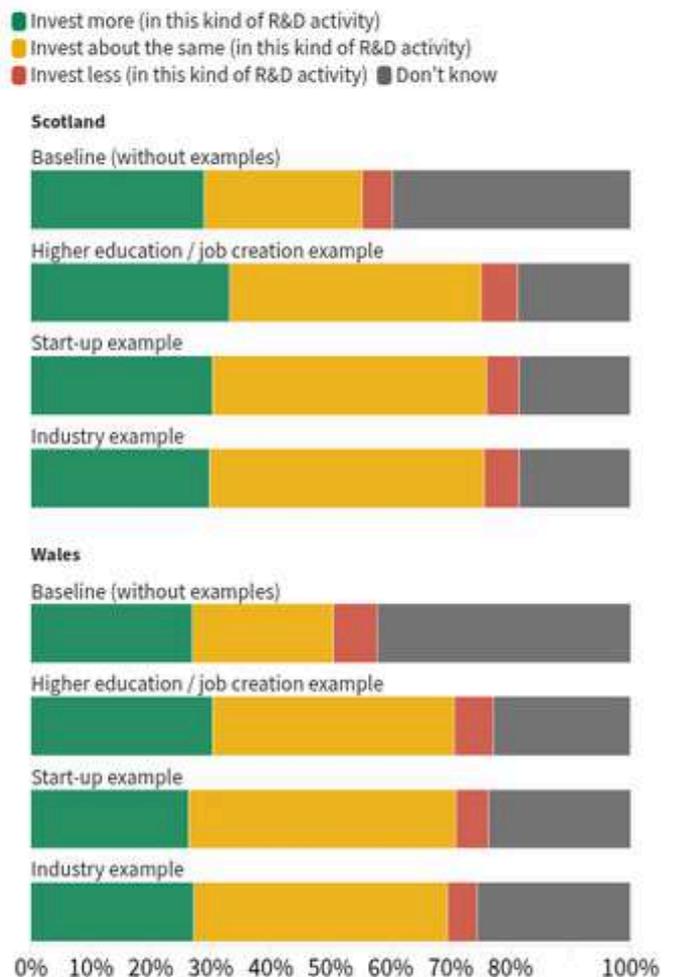
**Figure 22: How does providing examples of R&D's economic impact make the public feel about R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 On a scale of 0 to 10, where 0 is "completely negative" and 10 is "completely positive", how positive or negative did this statement make you feel about R&D in [Scotland][Wales]? n = 2,707 (Scotland), n = 1,626 (Wales)

When asked about investment levels, the results demonstrate that around three quarters in Scotland, and seven in ten in Wales, would like to see investment in each of these areas either maintained or increased. When compared with the earlier question about broad levels of investment in R&D in general (Figure 23), the act of giving specific examples is useful in reducing the level of don't know responses and increasing the proportion who said they would maintain current levels of investment. The case studies did not, however, increase the proportion who said they would invest more.

**Figure 23: Does providing examples of R&D's economic impact affect attitudes towards investment levels?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 For baseline: Do you think the [Welsh][Scottish] Government should increase, reduce or keep at the same level the amount of public money it invests in Research & Development in Wales/Scotland? // For case studies: [Example shown] Considering all the other spending priorities which they may have, would you personally like to see the [Scottish][Welsh] Government invest more, less, or about the same in this kind of activity in future? n = 2,707 (Scotland), n = 1,626 (Wales)

## Investing in R&D

Analysis by sub-groups demonstrates consistent support for maintaining or increasing investment across all three framings. However, some trends are notable.

There remains higher than average levels of ‘don’t know’ responses among some groups, including women, those in socioeconomic group DE, those who do not intend to vote at the May 2026 Senedd and Holyrood elections, and those who say they can’t think of ways R&D benefits Scotland or Wales.

Among those who do intend to vote at the May 2026 Senedd and Holyrood elections, there is a high level of consistency, and support, across the political spectrum. Nonetheless, those intending to vote Liberal Democrats and SNP in Scotland, and Plaid Cymru and Labour in Wales, are the most likely to support increased or the same levels of investment across all three case study examples.

For those who intend to vote for the other parties, the specific framing of the examples appears to impact preferences towards the level of investment. For example, those intending to vote Green in Scotland are supportive of all three case studies, but levels of support for increasing investment are higher for the example framed around Scottish higher education job creation, and lower for the pharmaceutical industry example.

Existing interest in, and connection to, R&D leads to higher levels of support for increasing investment when framed around any of the three examples. Where connection is lower, there is more support for maintaining existing levels of investment or more ‘don’t know’ responses.

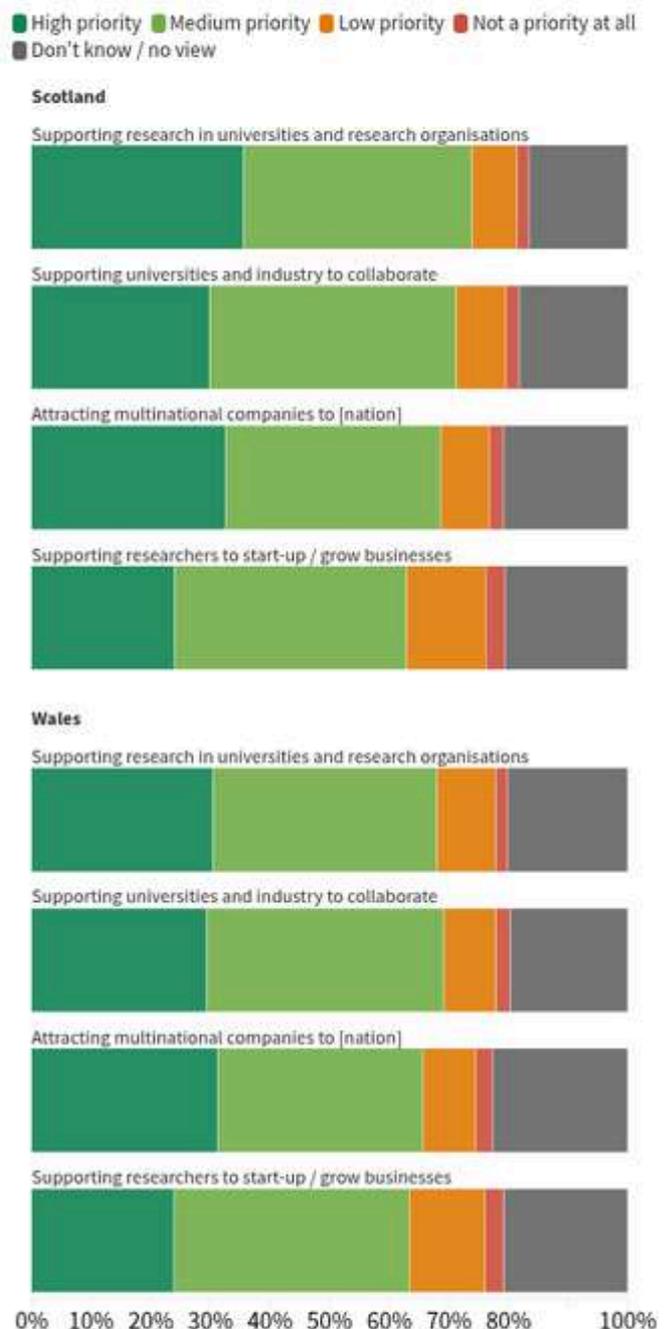
### Priorities on ways to support R&D

To understand levels of public appetite for government actions to support R&D in other ways, beyond direct investment, the survey posed a question framed around different potential policy actions. This asked respondents how much of a priority they thought each action should be for their devolved government (Figure 24).

A majority in each nation said it was important for their devolved government to support the R&D sector in all the ways tested, with slightly higher prioritisation seen in Scotland than Wales for most actions.

In both nations, the actions prioritised most strongly were supporting research carried out in Scottish or Welsh universities and research organisations (74% in Scotland and 68% in Wales), and supporting universities and industry to develop partnerships and share their knowledge (71% in Scotland and 69% in Wales).

**Figure 24: How much should devolved governments prioritise ways to support R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026  
 How much should the [Scottish][Welsh] Government prioritise support for Research & Development in the following ways? n = 2,707 (Scotland), n = 1,626 (Wales)

# R&D and the May 2026 elections

## Key takeaways

- People in Scotland and Wales want to see their elected representatives actively supporting R&D both locally and nationally.
- Support is strongest for representatives taking actions linked to healthcare, with clear majorities supporting them to campaign for more R&D to improve NHS patient experiences, diagnosis, and treatment and for their nearest NHS hospital to host more clinical trials.
- Levels of opposition to all actions tested are very low, with opposition peaking (at 13% in Scotland and 12% in Wales) for campaigning for greater funding for R&D in the defence industry.
- Those intending to vote Reform UK were somewhat less supportive than average across almost all actions, except for campaigning for greater funding for R&D in the defence industry (58% in Scotland and 59% in Wales support this).
- Constituency-level modelling predicts that the high levels of support we see for local actions related to R&D and devolved governments' investment in R&D are broadly consistent across constituencies in both Wales and Scotland.

## What the public want from elected representatives

To support R&D advocacy in Scotland and Wales during the run up to the 2026 Holyrood and Senedd elections and throughout the next parliaments, the survey included a series of questions exploring public appetite for their elected representatives to take actions to support R&D in Scotland and Wales.

There is broad support for elected representatives to campaign for a range of R&D-related activities after the May 2026 Senedd and Holyrood (Figure 25). Support is strongest (75% in Scotland; 74% in Wales) for elected representatives to campaign for more R&D to improve NHS patient experiences, diagnosis, and treatment. This is followed by campaigning for more clinical trials (69%; 67%) and championing Scottish/Welsh universities to help them attract research funding and talented researchers (65%; 62%).

There is majority support across most of the examples cited in the survey. The only instances where support falls below 50% is campaigning for greater funding for R&D in the defence industry (47% in Scotland and 46% in Wales) and – in Wales only – making the case for R&D in the Senedd (48%).

Levels of opposition are very low across all examples, reaching at most 13% and 12% opposed to campaigning for greater funding for R&D in the defence industry in Scotland

and Wales, respectively. Opposition was even lower, between just 2-6%, for all other actions tested in either nation.

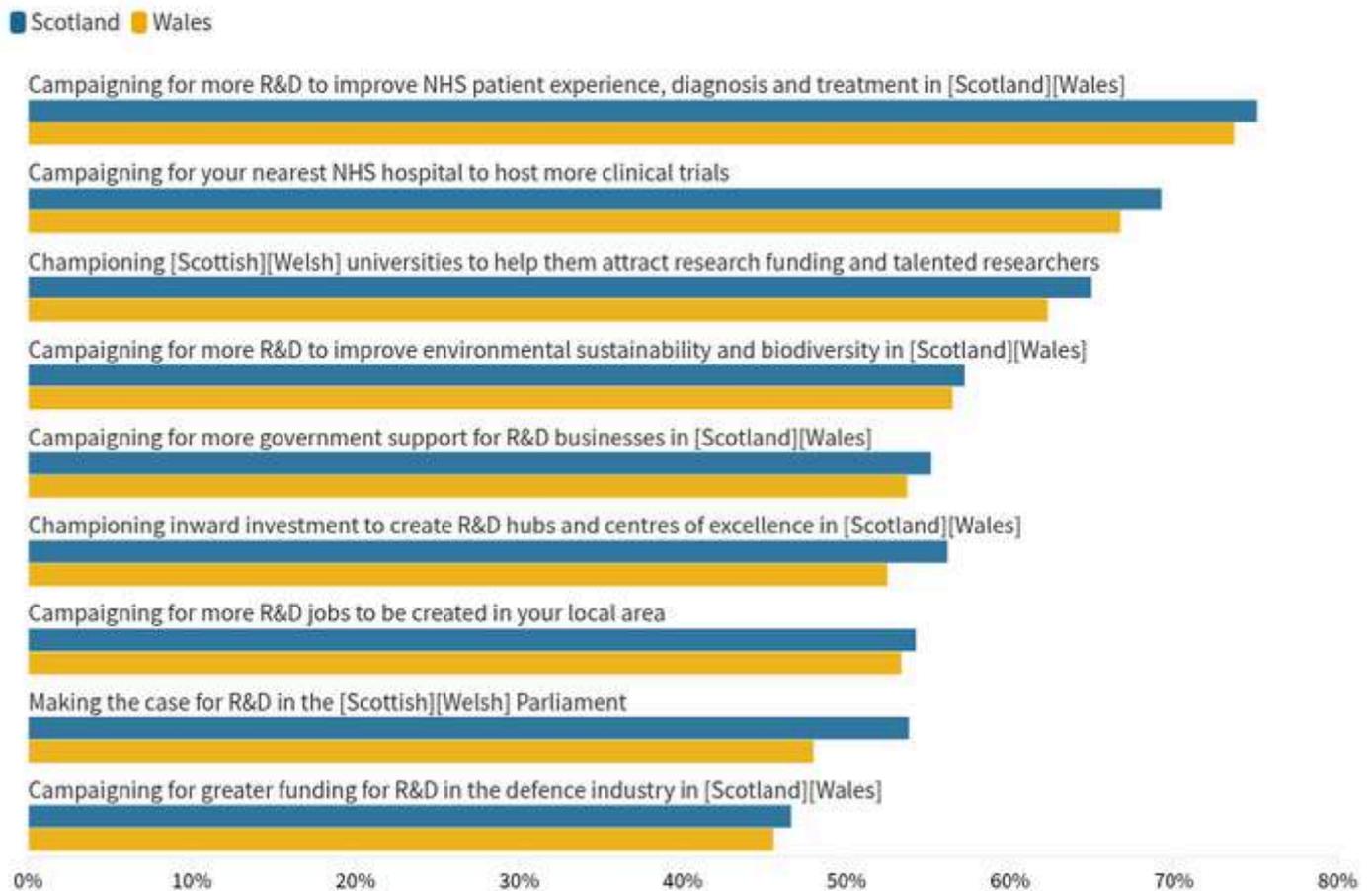
Sub-groups are important. Taking campaigning for more R&D jobs as an example, there are key differences according to voting intention at the May 2026 Senedd and Holyrood elections. In Scotland, support is highest among those intending to vote SNP (66%), Labour (62%), and Green (61%). It is lowest among those intending to vote Reform UK (44%) and those not intending to vote (34%). In both the latter cases, this reflects a larger proportion of ambivalent or not sure responses, rather than opposition. In Wales, support is highest among those intending to vote Labour (69%) and Plaid Cymru (65%), falling somewhat among Reform UK (49%) and then very low among those not intending to vote (26%).

Demographics are also associated with levels of support, with the following groups most likely to be supportive: men, socioeconomic group AB, those with a household income of £70,000+, and those with a university degree or higher. There is more ambivalence among DEs and lower income groups.

Levels of interest in, and connection to, R&D are highly correlated – with support highest among those who think that R&D makes a very or fairly big contribution to the Scottish/Welsh economy, those who perceive a personal benefit from R&D, and those who think that R&D is currently a strength of the nation.

# R&D and the May 2026 elections

**Figure 25: How much support is there for MSPs or MSs taking actions to support R&D?**



Source: YouGov and Icaro polling for CaSE • January 2026

Considering all the other priorities that they might have, to what extent would you support or oppose your elected representatives taking the following actions after the next the elections to the [Scottish][Welsh] Parliament in May? n = 2,707 (Scotland), n = 1,626 (Wales)

These trends play out across all the examples cited in the survey. However, some framings lead to higher or lower levels of support according to voting intention.

For example, those intending to vote Reform UK were more likely to support their elected representative campaigning for greater funding for R&D in the defence industry (58% in Scotland and 59% in Wales compared with national averages of 47% and 46%, respectively).

In contrast, they were least supportive of their elected representative campaigning for more R&D to improve environmental sustainability and biodiversity (36% in Scotland and 41% in Wales, compared with national averages of 57% and 56%, respectively). Those intending to vote Conservative are also somewhat less likely to be supportive of this action.

The reverse is true of those intending to vote Green who – along with SNP in Scotland and Plaid Cymru and Labour in Wales – are highly supportive of their representative campaigning for more R&D to improve environmental sustainability and biodiversity, and much less supportive of their representative campaigning for more funding for R&D in the defence industry.

# R&D and the May 2026 elections

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## Constituency-level analysis

Using the results from each survey, a Multi-Level Regression with Poststratification (MRP) analysis was carried out by research agency YouGov on six questions, to model the expected attitudes at the constituency level. (For more details on this methodology, please see Methods.)

This analysis was designed to support R&D advocates engaging with parliamentary candidates and elected officials during the Holyrood and Senedd elections and into the next parliaments. The actions were chosen in consultation with project sponsors and sector stakeholders, and aimed to cover a range of potential actions that MSs or MSPs could take to support R&D – rather than seeking polarising issues, or testing non-R&D issues. The predictions can be explored in full, including in a tool that allows you to search by constituency, [on our website](#).

Our analysis predicts that the high levels of support for local actions related to R&D and devolved governments' investment in R&D is broadly consistent across constituencies in both Wales and Scotland. This emphasises that incoming representatives that choose to support R&D, either locally or on a national level, would be supported in this action by constituents, regardless of constituency.

In Scotland, the few differences observed include greater support for local R&D actions in cities, most consistently in Edinburgh. There is less appetite for their MSP campaigning for more R&D jobs in Dumfriesshire (dropping below 50% support), which is part of a tendency towards lower levels of support in the Scottish Borders more generally. Meanwhile there appears to be slightly more support across a number of proposed actions in Eastwood in East Renfrewshire, and Aberdeen.

In Wales, there is a great deal of consistency across the 16 constituencies, but our analysis predicts:

- A tendency for lower support for action to attract research funding and talented researchers within three constituencies in the Valleys (Afan Ogwr Rhondda, Pontypridd Cynon Merthyr, and Blaenau Gwent Caerffili Rhymni) although there is still more than 50% support in each of the three constituencies.
- Slightly higher support for more R&D to improve the NHS in the north Wales constituencies of Bangor Conwy Môn and Clwyd.
- Slightly higher support for more R&D to improve environmental sustainability and biodiversity in the two Cardiff constituencies and Gŵyr Abertawe (Gower and Swansea).

## Methods

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The research adopted a quantitative approach, involving a large scale survey of 2,707 adults 16+ in Scotland and 1,626 adults 16+ in Wales.

### Sample

Interviews were conducted online with adults aged 16+ using YouGov's proprietary online panel. Panellists are recruited and agree to receive surveys periodically. Invitations for individual surveys are sent out according to the quota targets to control the sample profile, and respondents receive a small financial incentive (e.g. £0.50-£1.00 per five minutes of survey time).

Fieldwork took place in Scotland between 16th-27th January 2026 and in Wales and took place between 20th-28th January 2026.

Quota targets were set on region, age and gender (interlocked within region) and ethnicity to ensure that the sample reflects the known profile of the Scottish and Welsh populations on these demographic criteria. Minor shortfalls in achieving quota targets were addressed using RIM weighting post hoc, including additional weighting applied to socioeconomic group to ensure the correct profile according to the country's population.

### Providers

The research was led by Icaro, a Market Research Society (MRS) Company Partner. Survey fieldwork was executed by YouGov, who are a member of the British Polling Council and abide by its rules.

### Survey design

Survey questionnaires went through several rounds of iteration between Icaro and the CaSE team. Quantitative opinion data is always subject to a number of possible biases, most importantly a tendency for participants to agree with statements or "satisfice". To counteract this, the survey was designed to vary the types of questions shown, and incorporate binary choice scales and multi-select questions as well as agree-disagree likert-style questions. Attention was also given to the potential for sequencing bias and priming, with questions about awareness of the term R&D, for example, appearing early in the questionnaire.

### Reaching the sample

Participants were recruited through online proprietary panel providers, where individuals register their interest in taking part in online research in return for incentives. By their nature, online samples exclude those with low levels of digital access, however they enable strong control over the demographic make-up of the final sample. The sample is targeted to be representative of the Scottish and Welsh public according to the chosen quotas. All surveys are subject to some level of recruitment bias, where those who are interested in taking part may represent a more "engaged" group of people than if the selection was truly random. By reaching the sample through online panels, incentives can be tailored to meet specific groups to encourage the participation of those who are less likely to volunteer.

The survey also features attentional checks for inattentive responding, both in the form of trap questions where participants are instructed to select a specific answer option in order to proceed, and open-response questions which are retrospectively assessed for "nonsense" responding. All surveys also feature "reCAPTCHA" checks for bots, to prevent surveys being flooded by scripted responses, with a second check for such problems during analysis of any open responses.

### Analysis

CaSE's website has a section – [Download the Data](#) – that provides access to the full data tables, broken down by demographic groups. We have adopted a convention that sample sizes of less than 100 are too small for meaningful analysis or to adequately represent the sub-group, and so they are avoided throughout our analysis.

All survey results are subject to margins of error (because a sample has been surveyed, unlike in a Census where everyone answers). Statistical tests have been undertaken to the 95% confidence level (i.e. 95 times out of 100 the observed difference will be real compared with 5 times out of 100 it will have happened by chance).

For this survey with a sample of 2,707 in Scotland, the maximum margin of error in the results is  $\pm 1.9\%$  (i.e. if the survey result is 50% then the real result if everyone in Scotland was interviewed would be in the range 48.1% - 51.9%). For Wales with a sample of 1,626, the maximum margin of error in the results is  $\pm 2.4\%$  (i.e. if the survey result is 50% then the real result if everyone in Wales was interviewed would be in the range 47.6% - 52.4%).

## Methods

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NB. Statistical tests are only valid when the survey method has used random probability sampling. While the market research industry routinely applies the same logic to non-probability samples, like this survey, this must be done with appropriate caveats - including an acknowledgement that confidence limits are, technically speaking, not possible to calculate. Any reference in this report to statistically significant differences should be used to accurately guide the interpretation of trends and differences in the data, rather than be taken to be objective statistical fact.

### MRP

In addition to standard reporting, a Multi-Level Regression with Poststratification (MRP) analysis was carried out on six questions, to model the expected attitudes at a constituency level.

Results are projected across 73 Holyrood constituencies across 16 Senedd constituencies with each multilevel model estimated by the PSA supercomputer cluster using 4000 iterations across 6 Monte-Carlo Markov chains.

A key advantage of using MRP over conventional polling methods is its ability to use data collected at a 'higher' level of geography and fit statistical models to estimate how that breaks down in smaller, specific areas. This gives a far more robust way of understanding how opinions change over space than using large geographic cross-breaks or overinterpretation of small sample sizes in given places.

Using MRP also avoids the expense (and often, sheer impracticality) of commissioning a long series of bespoke local polls to achieve the same insights.

MRP estimates local public opinion by combining two key approaches. Firstly, by finding relationships it can estimate and attribute to variation in factors about individuals (e.g. age, gender, education level) and the places they live (e.g. the level of unemployment in local areas, vote shares for parties in recent elections).

Secondly, when sufficiently powered with large sample sizes and large computational capacity, it can also account for hyper-local factors specific to individual areas which might not necessarily be possible to pick up using data alone.

Taken altogether, then projected over a multi-million cell database of information about local areas, this MRP produces proper, robust estimations of how different people think, behave, and believe across geography.

The results are central point estimates drawn from the Bayesian-estimated posterior distributions of the variable outcome levels, alongside 90% credible intervals.



Campaign for Science and Engineering is a non-partisan charity with a membership that cuts across R&D sectors. It takes a high-level, cross-sector view of the research and innovation environment, and gives impartial expert insight on the whole R&D system to decision-makers.

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