Social Security Scotland
Tèarainteachd Shòisealta Alba

Social Security Scotland: Social Research Plan 2026-27

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1. Introduction

This plan outlines Social Security Scotland's social research work programme for the 2026-27 reporting year. This includes a continuation of our core research with Social Security Scotland's clients, staff and stakeholders, the development of some new recurring research, and some standalone projects.

Social research in Social Security Scotland is published in line with the Scottish Government Social Research Publication Protocol.

Social Security Scotland is committed to evidence informed service delivery and making improvements to our services. Social research in Social Security Scotland in 2026-27 will ensure that client, staff, and stakeholder views, needs and experiences can influence decision making in the organisation. Our work is used to monitor experiences of the service, and to inform continuous improvement. Our research is essential for meeting Our Charter commitments and delivering on our principles of dignity, fairness and respect. It ensures that user voice is heard in how Social Security Scotland operates.

Every project and every research question is designed to add value for the organisation, in one or both of two ways. We provide transparency on whether clients, staff and stakeholders are experiencing dignity, fairness and respect and a quality service. And we allow colleagues to make decisions informed by clients' experiences, needs and views. This leads to better quality decisions to improve the delivery and efficiency of the service.

For example, our Client Satisfaction Survey findings showed that clients wanted more updates on the progress of their applications. This provided evidence to support development of new updates for clients at specific points in the application process. We are now seeing the positive impact of this both in Client Satisfaction Survey findings, and in the volume of calls from clients seeking updates. This research therefore contributed to a better client experience and a more efficient service.

Social Security Scotland social researchers work closely with other relevant research teams, in line with data protection legislation and GDPR requirements. This includes:

- **Social researchers in the Scottish Government**: the Scottish Government is responsible for setting the policy aims for the payments delivered by Social Security Scotland. A social research team in the Scottish Government runs a series of policy evaluations. We assist the Scottish Government social research team with inviting clients to participate in their research, and sometimes by asking questions for them in our surveys. We share anonymised findings with them for their evaluations, and we also use their findings in our work where relevant.

- **User researchers in Social Security Scotland**: User research helps teams learn about users and create services that meet their needs. They help to create services that break down the barriers faced by our clients and the people delivering our benefits. They work with our users to learn how they experience our services and how they can be improved. The User Research team use our Client Panels to recruit participants for their research and testing. We also share findings with them to inform service improvements.

We coordinate work across the three research areas (social research and user research in Social Security Scotland and social research in Scottish Government) to ensure that research underpins policy and operational decision making, that there is no duplication across the teams and that best use is made of all research findings.

This plan first outlines our core research, covering performance reporting, client research and staff research. It then outlines our research development plans for the year.

2. Our core research

Our main focus in social research in Social Security Scotland is recurring research with clients, staff and stakeholders to monitor their experiences with us, and reporting evidence on the organisation's performance across two Frameworks. This provides a vital and robust route for feedback, giving all people who interact with Social Security Scotland an opportunity to tell us about their experience. Building this into the fabric of our service, with invites going out to people with recent experience of our service on a rolling basis, allows us to monitor how we're delivering on Our Charter, and whether Social Security Scotland are treating people with dignity, fairness and respect. Our current core strands of work are:

2.1. Performance Reporting

Performance Framework

Developing a Performance Framework was a priority in Social Security Scotland's 2024-25 Business Plan.

It addressed an Audit Scotland recommendation about developing a Performance Management Framework to "ensure that an evidence based assessment of performance is available to demonstrate that value for money is being achieved."

It is a complementary document to the Charter Measurement Framework, which remains the primary way we report on Our Charter. The Performance Framework looks more broadly at our performance in the round. In July 2025 we published our Performance Framework for the first time, outlining a set of 23 performance outcomes.

From November 2026 we will begin publishing annual analytical reports on our performance against these outcomes.

In 2026-27 we will:

- Collate and collect data and information for our inaugural 2025-26 Performance Framework Report.
- Publish alongside the Annual Report and Accounts in November 2026.
- Review and begin work on the 2026-27 Performance Framework report.
- Continue to engage with internal and external stakeholders to ensure the report and future reports meet their needs.

Charter Measurement Framework

The Social Security (Scotland) Act 2018 required the Scottish Government to create Our Charter.

The purpose of Our Charter is to set out what people should expect from the social security system, which we will administer. It explains in clearer terms how we will uphold the Principles in the Act, how we will make sure that we are taking a human rights-based approach to what we do and how we will demonstrate dignity, fairness and respect in all our actions.

The Charter Measurement Framework is a co-designed list of measures relating to the commitments set out in Our Charter. Every year, we collect relevant and available information and data for the measures, put it into the framework and then publish the results. The framework outlines how Social Security Scotland and the Scottish Government are delivering the Charter commitments and helps them improve their service.

Social researchers compile the information for the Charter Measurement Framework annually, using published research and statistics and a small amount of previously unpublished management information. We also conduct annual surveys of Social Security Scotland's people and stakeholders in partner organisations for the Charter Measurement Framework.

The Charter Measurement Framework therefore provides comprehensive data on aspects of performance that are important to our clients. It shows time series for statistics and survey data by benefits and is used by internal and external stakeholders to understand how Social Security Scotland is performing.

In 2026-27 we will:

- Complete fieldwork, analyse, compile, write up and publish the 2025-26 Charter Measurement Framework and Charter Research.

- Plan and begin fieldwork for the 2026-27 Charter Measurement Framework and Charter Research.

2.2. Client Research

Client Satisfaction Survey

The Client Satisfaction Survey monitors client experiences of Social Security Scotland. It gives rich data for improvement and provides much of the data required for the Charter Measurement Framework. The Client Satisfaction Survey collects the experiences of people who apply for, or receive, a benefit from Social Security Scotland (including those who automatically qualify for a benefit). Survey questions cover key points in the experience of a client, including interactions with staff, making an application and receipt of payments. These questions also support the measurement of commitments made in Our Charter.

The results of the Client Satisfaction Survey are published annually alongside the Charter Measurement Framework. Improvements to the Client Satisfaction Survey, including automatically inviting clients to take part, mean that there are now tailored versions of the survey for each benefit. Colleagues including operational and policy can now get a more detailed and timely understanding of each benefit experience to inform decision making and continuous improvement. There is also now the ability to add benefit specific questions to the respective version of the survey to allow client views to immediately become part of discussions on emerging issues.

This has led to improvements in the Client Satisfaction Survey publications where there are now biannual, benefit specific, publications covering Five Family Payments, Disability applications, and Carer Benefits. The biannual reports are usually published alongside respective benefit Official Statistics to provide more holistic evidence, where possible.

In 2026-27 we will:

- Make changes to the survey content and publications by: Including further breakdowns for Scottish Government Priority Family groups; and improving the way Supplementary Tables are presented, making them easier to understand and more accessible.
- Explore possible improvements to the collection and publication of findings related to Seldom Heard Groups.

These changes directly support the Tackling Child Poverty Delivery Plan 2022-26 and will help in analysis of progress against the plan for these groups particularly when cross referenced with Social Security Scotland official statistics.

These research plans will also help inform the implementation of the current Benefit Take Up Strategy, published in 2021, as well as inform the development of the next strategy, due by October 2026 by providing enhanced detail to support analysis of take up rates, informing understanding of the impact and reach of the strategy, particularly amongst seldom heard groups.

This work also meets commitments published in the Scottish Government Seldom Heard Groups Action Plan 2025-26 relating to the actions in the "Data Collection and Evaluation" theme.

Client Panels and Annual Client Panels Survey

The Client Panels are made up of clients who have signed up to take part in further research while taking part in the Client Satisfaction Survey. We use the panels for a range of projects across social research.

We have panel members from all parts of Scotland, and with experience of every one of our benefits. The characteristics of panel members are broadly similar to those of the client base.

The Client Panels allow us to undertake responsive, targeted, bespoke research to inform continuous improvement in Social Security Scotland's service. Doing this research in-house allows us to work quickly, closely with decision makers, and efficiently.

Members of the Client Panels are invited to take part in the Annual Client Panels Survey by the social research team every November. The Annual Client Panels Survey is an efficient and proportionate way to research post-decision experiences of a large number of clients which are not covered by the Client Satisfaction Survey or other feedback surveys. This includes questions on receiving payments (which are required for the Charter Measurement Framework), ongoing communications, experiences of Motability and accessing additional support using disability awards, and changes of circumstances.

This survey gives us insight into clients' experiences after the initial decision or payment, to inform decision making and continuous improvement of case maintenance processes.

In 2026-27 we will:

- Publish the third round of the Annual Client Panels Survey in late summer 2026.
- Run the fourth round of the survey in November 2026.
- Continue to manage the process of panel members joining and leaving, and after two years inviting members to extend their membership for a further two years.

- Support the use of the Client Panels for research by all Social Security social and user research teams, allowing efficient recruitment of targeted client groups for user research design and testing work, and for the policy evaluations.

Client feedback surveys

The Client Satisfaction Survey described above covers the first part of a client's experience with Social Security Scotland. It asks questions about the application process, or the experience of receiving an automatic payment. There are other parts of Social Security Scotland's service which happen after the Client Satisfaction Survey invite has been issued. In 2024-25 we started development on a range of new client feedback surveys to cover these parts of the service where we did not have data on client's experience. These surveys support the Operational Delivery Improvements priority in Social Security Scotland's Business Plan 2026-27.

In 2025-26 we published our first findings from our surveys on re-determinations, when clients disagree with a decision and challenge it; and the complaints process. We developed the surveys with colleagues working in these areas. They are using the findings to monitor performance, identify changes to improve client experiences and monitor the effect of these changes. We also reviewed the survey questions and ran the first of two rounds for the 2025 report.

In 2025-26 we also began data collection for a survey of clients on their experiences of setting up a debt repayment plan. This will continue on a rolling basis under there are enough responses to meaningfully analyse.

In 2026-27, we will:

- Publish findings from our 2025 challenging a decision and complaints surveys.
- Continue to develop the two surveys, including working towards running fieldwork more frequently to better support internal performance monitoring and decision making.
- Continue inviting clients to complete the debt repayment plan survey.

2.3. People research

We are committed to continually understanding our peoples' attitudes to, and experience of, working in Social Security Scotland. We co-ordinate Social Security Scotland's annual participation in the Civil Service People Survey and lead on dissemination of findings across the organisation.

Social Security Scotland's results for the Civil Service People Survey are published by the Cabinet Office alongside all participating Government Departments. As mentioned above, we also conduct research with our people as part of the Charter Measurement Framework.

3. Research in development

3.1. New client feedback surveys

We plan to introduce two new client feedback surveys. These final two feedback surveys will complete our coverage of client experience of the main parts of our service. As these surveys become fully established in the coming years, they will allow data on clients' experiences to be used as part of performance monitoring by operational teams.

The first is a survey of clients who have had appointments with Client Support Advisers in our Local Delivery Service, who support new and existing clients to access our benefits. We undertook an initial survey of client experiences of our Local Delivery Service in 2023, and are now looking to put in place a feedback survey immediately after appointments to run on an ongoing basis. This work will allow us to explore client experiences and areas for improvement.

The second survey will ask clients about their experiences of the award review process for disability benefits. The findings will contribute to the "Operational Delivery Improvements" priority in the 2026-27 Business Plan, commitments in both the Mid-Term Financial Strategy and Fiscal Sustainability Delivery Plan, and the work to address recommendations on change of circumstances, award periods and reviews which came from the Independent Review of Adult Disability Payment. More broadly, the survey will allow client feedback to inform decision-making and allow measurement of the impact of any changes.

In 2026-27 we will:

- Continue work to develop a feedback survey for clients who have had an appointment with a Social Security Scotland advisor.
- Finalise and launch a client feedback survey for disability payment award reviews.

3.2. Client Satisfaction Survey analysis

In the 2025-26 annual report for the Client Satisfaction Survey (publishing late 2026) we are planning to conduct additional analysis of Client Satisfaction Survey data to enhance understanding of client satisfaction. This will include building on previous work to develop and refine regression models that identify the key predictors of overall satisfaction.

Continuing this analysis meets the recommendation set out in Audit Scotland's report on Adult Disability Payment. It will also enable internal and external stakeholders by providing deeper insights into the factors that influence client experiences and outcomes.

We will also undertake and publish new analysis on changes across reporting periods in biannual publications. This initiative will be piloted and further developed through stakeholder feedback and ongoing enhancements during 2026–27 and beyond. These changes will provide internal and external stakeholders with a deeper understanding of trends over time, offering greater context for the findings presented.

4. Summary of 2026-27 research

This table covers all our current research projects for publication in 2026-27. This includes reports on surveys which took place last year, and survey work that will occur this year but publish in 2027-28. If we undertake additional projects during 2026-27, we will update this document.

Project	Description	Start date	Publication timing
Client Satisfaction Survey Annual	Leading the overarching scope of the Client Satisfaction Survey and annual publication, ad hoc data requests, dissemination coordination	NA	November 2026
Client Satisfaction Survey Five Family Payments	Leading on the Five Family Payments elements of the Client Satisfaction Survey including Biannual publication	April 2024	Ongoing
Client Satisfaction Survey Disability	Leading on the Disability Application elements of the Client Satisfaction Survey including Biannual publication	April 2024	Ongoing
Client Satisfaction Survey Carer's benefits	Leading on the Carer benefits' application elements of the Client Satisfaction Survey including Biannual publication	February 2026	Ongoing
Civil Service People Survey	Set up of the Civil Service People Survey for Social Security Scotland's participation there-in	To be announced	To be announced

Project	Description	Start date	Publication timing
Scottish Government Priority Family Groups Intersectionality and Seldom Heard	Publication of Scottish Government Priority Family Groups Intersectionality and Seldom Heard breakdowns for Client Satisfaction Survey	November 2025	November 2026
Client feedback: re-determinations survey 2025	Feedback survey for clients who have requested re-determinations.	January 2025	September 2026
Client feedback: Complaints survey 2025	Feedback survey for people who have complained to Social Security Scotland	January 2025	September 2026
Annual Client Panels Survey 2025	Annual survey of Client Panel members, gathering insights on post-decision experiences	Ongoing (annual cycle)	September 2026
Performance Framework Report 2025-26 (new)	Collated data and evidence on our Performance Framework outcomes for 2025-26	August 2025	November 2026
Charter Research 2025-26	Research with partners and staff to provide data for the Charter Measurement Framework report	Jan-26	November 2026
Charter Measurement Framework 2025-26	Populating the Charter Measurement Framework report with data collated from sources across the organisation	April 2026	November 2026
Charter Research 2026-27	Research with partners and staff to provide data for the 2026-27 Charter Measurement Framework report	January 2027	November 2027

Project	Description	Start date	Publication timing
Performance Framework 2026-27	Summary of evidence on 2025-26 performance relating to Performance Framework outcomes	September 2026	November 2027
Client feedback: re-determinations survey 2026	Feedback survey for clients who have requested re-determinations.	Mar-26	Summer 2027
Client feedback: Complaints survey 2026	Feedback survey for people who have complained to Social Security Scotland	Mar-26	Summer 2027
Annual Client Panels Survey 2026	Annual survey of Client Panel members, gathering insights on post-decision experiences	Ongoing (annual cycle)	Summer 2027
Client feedback: Local Delivery survey	Feedback survey for clients who have had an appointment with a Client Support Adviser. In development in 2025-26. May begin publishing data in 2026-27.	Autumn 2026	Summer 2028 (to be confirmed)
Client feedback: Debt repayment survey	Scope and then design and deploy a feedback survey for clients who have agreed a debt repayment plan.	May 2026	Summer 2027 or 2028 (tbc)
Client feedback: Reviews survey	Development of a new feedback survey or surveys for clients who have recently experienced a review.	Autumn 2025	Summer 2027

5. Contact us

If you would like to get in touch with researchers at Social Security Scotland to provide feedback on this work programme or more generally on the social research outputs we produce, please contact researchrequests@socialsecurity.gov.scot.

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