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The Anholt – GfK Roper
Nation Brands Indexsm:
2014 Report for Scotland



**THE ANHOLT – GFK ROPER
NATION BRANDS INDEXSM:
2014 REPORT FOR SCOTLAND**

Scottish Government Strategic Research

Scottish Government Social Research
2014

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1 EXECUTIVE SUMMARY

- 1.1 To 'Improve Scotland's Reputation' is one of the indicators of the Scottish Government's National Performance Framework.¹ Since 2008, the Scottish Government has used the Anholt-GfK Roper Nation Brands IndexSM (NBISM)² to assess and monitor how Scotland's reputation is perceived around the world.
- 1.2 Conducted annually from 2008, the Anholt-GfK Roper Nation Brands IndexSM examines the image of 50 nations. Each year, approximately 20,000 adults aged 18 and over in 20 core panel nations are interviewed online. The Anholt - GfK Roper Nation Brands IndexSM looks at a country's image by examining six dimensions of national competence: Exports, Governance, Culture, People, Tourism, and Investment and Immigration. This gives an overall indication of a country's reputation.
- 1.3 **Scotland's score (61.8)³ and rank (17th) on the Index show that Scotland continues to have a strong reputation abroad. Scotland's reputation has improved in comparison to its 2012 performance (we do not have 2013 data) in terms of the overall NBISM score (60.1).** Scotland's relative rank has, however, dropped two positions since 2012 (from 15th), as a result of changes in the sample of countries rated and moderate relative changes in individual country scores.
- 1.4 **This is the first time the available Scotland data have shown an improvement since the indicator's baseline year (2008). In terms of the National Performance Framework this shows that Scotland's performance is "improving".⁴**
- 1.5 Scotland continues to score highly, placed in the Top 20 nations, and is scored and ranked similarly and sometimes ahead of other comparator small, high income, Western European liberal democracies on the index.
- 1.6 In terms of absolute score, Scotland's reputation has improved on each of the six dimensions of the index compared to 2012. In terms of relative rankings, Scotland's reputation for Tourism has gained in position compared to 2012 and continues to be seen as Scotland's strongest point. Exports remain to be perceived as Scotland's weakest point. Across all dimensions, with the exception of Exports, Scotland is ranked within the Top 20.
- 1.7 Key findings from the 2014 NBISM are summarised in the infographic (Figure 1) on the following page.

¹ <http://www.scotland.gov.uk/About/Performance/scotPerforms/indicator/reputation>

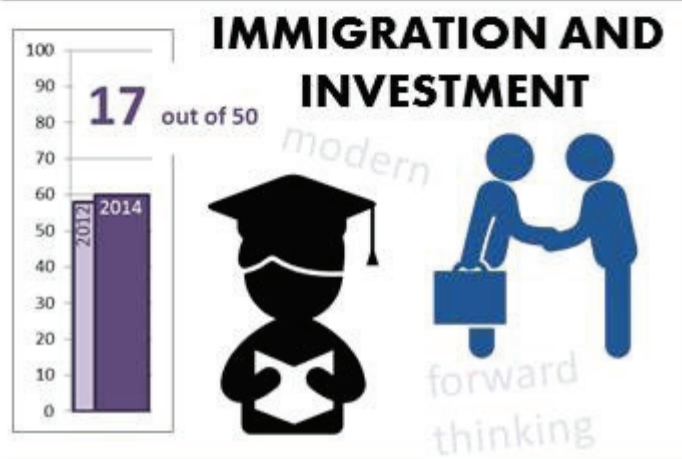
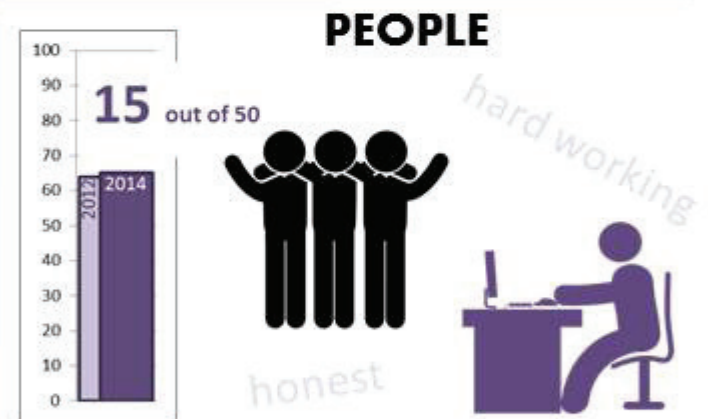
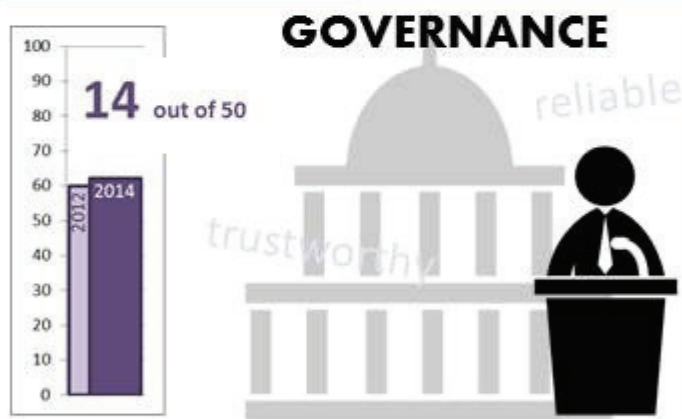
² The Anholt-GfK Roper Nation Brands Index and the Nation Brands Hexagon are trademarks and copyrights of Simon Anholt and GfK Roper.

³ NBISM scores range 1-100. NBISM rankings range 1-50.

⁴ This assessment was made on the basis that the score has seen an increase above the level set for the criteria for recent change (see paragraph 3.15.)

Figure 1: Summary of 2014 NBISM key findings

Scotland's Reputation 2014



2 INTRODUCTION

- 2.1 The Scottish Government's Purpose is to make Scotland a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.⁵
- 2.2 A nation's international image impacts upon the popularity of its exports, as well as the ability to attract visitors and secure inward investment – all of which play a role in shaping the delivery of economic growth.
- 2.3 To 'Improve Scotland's Reputation' is one of the indicators of progress on the Scottish Government's National Performance Framework. Since 2008, the Scottish Government has used the Anholt-GfK Roper Nation Brands IndexSM to assess Scotland's reputation around the world. The data allow for an understanding of how Scotland is perceived in 20 countries⁶ around the world; and how it compares to 49 other countries included in the Nation Brands IndexSM.
- 2.4 Whilst being the best available measure of *Scotland's* reputation for the purpose of the National Performance Framework, the NBISM does not provide an evaluation of the *Scottish Government's* policies.
- 2.5 To use and understand the NBISM data, it is important that it is recognised as a snapshot of people's attitudes to, and perceptions of, Scotland only. Attitudinal data of this kind are, however, useful in helping us to understand more about Scotland's international reputation.

Background to the Anholt GfK-Roper Nation Brands IndexSM

- 2.6 The Anholt GfK-Roper Nation Brands IndexSM (NBISM) is an analytical tool which attempts to measure and rank a country's broad reputation, not just focusing on one particular dimension (for instance, a tourist destination). The NBISM provides an independent definition of reputation which allows it to be measured in a consistent and accessible way across a number of countries.
- 2.7 Scotland has participated in the NBISM survey in 2008, 2009, 2010, 2012 and 2014.⁷ This report will compare the 2014 data to the most recent previously available data of 2012.

⁵ Scottish Government (2011) The Government Economic Strategy. The Scottish Government (<http://www.scotland.gov.uk/Resource/Doc/357756/0120893.pdf>)

⁶ Twenty panel countries are selected for the survey for the NBISM study; according to GfK-Roper, the survey strives to represent regional balance as well as balance between high-income and middle-income countries.

⁷ The Scottish Government did not subscribe to the 2011 or 2013 NBISM survey, given its stable performance; however, Scotland was included in the sample of 50 evaluated countries in both of these years.

3 METHODOLOGY

The Nation Brands Index

- 3.1 Conducted annually from 2008, the Anholt-GfK Roper Nation Brands IndexSM examines the image of 50 nations. Each year, approximately 20,000 adults aged 18 and over in 20 core panel nations are interviewed online. The Anholt - GfK Roper Nation Brands IndexSM explores a country's image by examining six dimensions of national competence all of which are weighted equally. The six dimensions are:
- 3.2 **Exports.** Examines panellists' image of products and services from each country, their view of a country's contribution to innovation in science and technology and the degree to which a country is recognised as a creative place.
- 3.3 **Governance.** Considers public opinion regarding the level of national government competency and fairness, as well as its perceived commitment to global issues such as peace, poverty and the environment.
- 3.4 **Culture.** Reveals global perceptions of each nation's cultural heritage and appreciation for its contemporary culture and recognition of its sporting excellence.
- 3.5 **People.** Explores the population's reputation for employability, openness and welcome, as well as appeal of the people on a personal level.
- 3.6 **Tourism.** Captures the level of interest in visiting a country and the draw of its natural beauty, historic built environment and vibrant city attractions.
- 3.7 **Immigration and Investment.** Looks at a country's appeal as a place to live, work, invest or study, and reveals how people perceive a country's economic and social situation.
- 3.8 The overall NBISM score is an average of the scores from the six dimensions mentioned above. There are between 3 and 5 questions for each of the dimensions, resulting in a total 23 'attributes' across the six dimensions. Ratings are based on a scale from 1 to 7, with 7 being the highest and best, 1 being the lowest and worst, and 4 being the middle position which is neither positive nor negative. Each dimension also has a word choice question which gives some depth to how those surveyed perceive a nation's image.
- 3.9 The 2014 NBISM survey was conducted in 20 major developed and developing countries. The core 20 rating panel countries are:
 - North America: the United States, Canada
 - Western Europe: the United Kingdom, Germany, France, Italy, Sweden

- Central and Eastern Europe: Russia, Poland, Turkey
- Asia-Pacific: Japan, China, India, South Korea, Australia
- Latin America: Argentina, Brazil, Mexico
- Middle East/Africa: Egypt, South Africa

3.10 20,125 online interviews were conducted with at least 1,000 adults aged 18 or over per country between July 10th and July 28th 2014⁸ for the 2014 NBISM survey. Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender, and education of the 2014 online population in that country. Additionally, in the United States, the United Kingdom, South Africa, India and Brazil, race/ethnicity has been used for sample balancing.

3.11 The NBISM measures the image of 50 nations. In each panel nation the list of 50 nations is randomly assigned to panellists, each of whom rates 25 nations, resulting in each nation receiving approximately 500 ratings per panel country.⁹ Thus approximately half of the total sample will have been asked to rate and compare Scotland's reputation. The survey panellists from each country and their thoughts on each of the six dimensions are weighted equally.

3.12 The list of 50 rated nations in 2014 is as follows, listed by region:

- North America: the United States, Canada, Puerto Rico*
- Western Europe: the United Kingdom, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, , Switzerland, Finland, Austria, Greece, Norway*
- Central/Eastern Europe: Russia, Poland, Czech Republic, Hungary, Turkey, Ukraine*
- Asia Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Malaysia*, Singapore, Taiwan, Australia, New Zealand
- Latin America: Argentina, Brazil, Mexico, Chile, Peru, Colombia, Ecuador, Jamaica*
- Middle East/Africa: The United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Kenya, Nigeria, Qatar.

Note: "*" indicates nations that were included in the 2014 survey but not in 2012; four nations measured in 2012 but not in 2014 are Belgium, Croatia, Malaysia, and Georgia.

⁸ Fieldwork in Egypt was extended to 31st July 2014.

⁹ Two exceptions are worth noting: In Egypt, where panellists are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation receiving approximately 250 ratings. Chinese panellists are asked to rate all nations except their own.

Interpreting the 2014 NBISM Data

- 3.13 The NBISM, in the long-term, will represent a useful tool to track and monitor Scotland's reputation in the minds of people around the world at a high-level. It does not provide an evaluative measure of policy interventions.
- 3.14 The contractors, GfK Roper and Simon Anholt, own the concept, data and intellectual rights. The Scottish Government is therefore restricted in what it can publish from the Nation Brands IndexSM. The data published and analysed in this report represent the core information on Scotland's position on the NBISM. The report has been checked by the contractors to ensure it complies with the Scottish Government's contractual obligations.
- 3.15 The NBISM is used to assess progress against one of the indicators from the Scottish Government's National Performance Framework, 'Improve Scotland's Reputation'. Assessment of any change in Scotland's performance is based on Scotland's absolute score as it compares to the previous year's score. An increase of 1 point or more in Scotland's absolute score suggests that the position is "improving", whereas a decrease of 1 point or more in Scotland's absolute score suggests that the position is "worsening"¹⁰. **This report will comply with these guidelines and will only consider an increase/decrease in score exceeding 1 point to be representing change, and otherwise treat the score as unchanged.**
- 3.16 The NBISM provides both a rank and score of the overall and individual elements of a country's reputation. It is important to note that the rank is responsive to changes in the sample of evaluated nations¹¹ and is therefore informative about the relative rankings in a particular year only. The score enables direct comparison between years.

¹⁰ If change is within +/- 1 point, this suggests that the position is within measurement error and is more likely to be "maintaining" than showing any change.

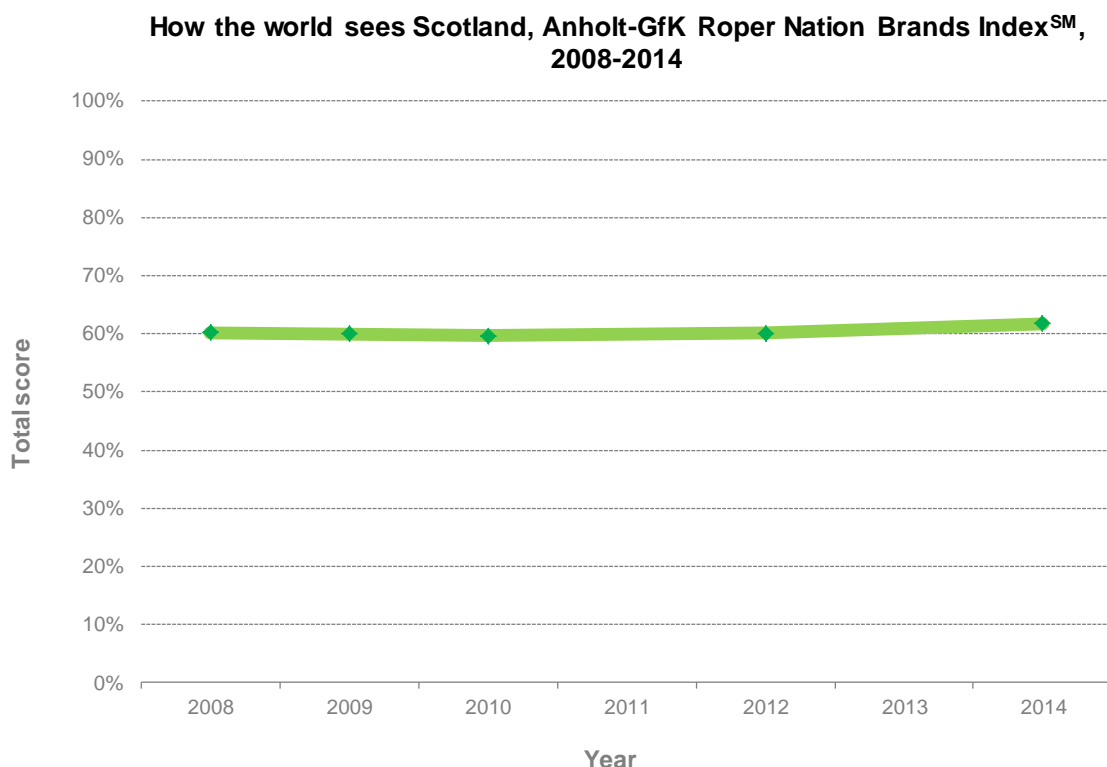
¹¹ Between 2012 and 2014, four countries (Norway, Ukraine, Puerto Rico and Jamaica) entered the sample, whilst four nations exited (Belgium, Croatia, Malaysia and Georgia.)

4 SCOTLAND'S REPUTATION OVERALL

Scotland's Position on the NBISM

- 4.1 Scotland's score of 61.8¹² and rank (17th) places it in the Top 20 nations and shows that Scotland has a high level of recognition. Scotland's overall reputation in terms of NBISM score has improved in comparison to its 2012 score (60.1) . Scotland's relative rank this year has, however, dropped two positions (from 15th in 2012). This reflects changes in the sample of countries and moderate relative changes in individual country scores. Although Scotland is ranked 17th, its score is much closer to the top of the index than it is to the bottom, and it is in the middle of the group of small, high income countries that form the 4th quartile of the Top 20 nations.
- 4.2 Scotland's overall reputation scores and ranks alongside, and ahead of some other comparator small, high income, liberal Western European democracies.
- 4.3 Figure 2 shows that Scotland has maintained its good international reputation since 2008, when it joined the NBISM, with an improvement in 2014 compared to 2012.

Figure 2: Scotland's International Reputation¹³



¹² NBISM score range 1-100. NBISM rankings range 1-50.

¹³ The Scottish Government did not subscribe to the survey in 2011 or 2013 due to Scotland's stable performance, and therefore did not have data available for this year.

- 4.4 While occasional dramatic shifts from year-to-year¹⁴ in how reputations are perceived are captured by the NBISM, in general the reputations of established nation brands tend to be stable. 2014, however, has seen more score movement across the index than 2012 and previous years, particularly in the Top 20 countries, with the majority seeing a score increase compared to 2012. The relative overall rankings have also changed moderately, as a result of changes in the sample of countries and moderate relative changes in individual country scores, particularly in the second tier of rated countries (10-20) within which Scotland sits.

National Performance Framework Indicator, 'Improve Scotland's Reputation'

- 4.5 The NBISM is used to assess progress against the National Indicator 'Improve Scotland's Reputation'.
- 4.6 Scotland's absolute NBISM score has increased between 2012 and 2014 by 1.7 points indicating improvement¹⁵ in how Scotland's image and reputation are perceived internationally. This is the first year, for which we have Scotland data, since the baseline (2008) that Scotland's NBISM score has seen an increase above the level set for the criteria for recent change. **Scotland's performance on the National Performance Framework indicator 'Scotland's reputation' is therefore "improving"**.

Scotland's Reputation in Different Countries

- 4.7 Table 1 below shows that the UK panel is the most positive and favourable towards Scotland of all panel countries.¹⁶
- 4.8 Table 1 also shows that all of the panel countries rank Scotland somewhere between 10th and 26th place among the 50 rated countries, with the exception of the UK which ranks it higher (6th). Scotland's reputation remains strongest in the European Union and the Commonwealth countries, the majority of which rank Scotland in the Top 15.
- 4.9 There have been noticeable improvements in the perception of Scotland in France and Egypt compared with 2012, with their ranks (12 and 26, respectively) both up 5 positions in 2014, accompanied by a score increase. Scotland's reputation, both in terms of score and rank, also improved in Canada, Australia, United States, Brazil, and Russia. South Africa gives Scotland a higher rank in 2014 than 2012, but this is not accompanied by a significant score change indicating that Scotland's reputation is perceived positively in this panel country relative to other countries but is not improving significantly over time.

¹⁴ The most notable shift in the Top 10 since 2008 was in the case of the US: ranked 7th in 2008, it progressed to the top of the list in 2009, and maintained its position as the leader of NBISM rankings until 2014 when it was ranked 2nd place to Germany.

¹⁵ See paragraph 3.15 on assessment of change in Scotland's performance.

¹⁶ It is likely that some of the UK sample being asked about Scotland are either living in Scotland and/or are from Scotland. However, we cannot tell how many respondents fall into this category from the data available.

4.10 Sweden's perception of Scotland, relative to other ranked countries, has deteriorated noticeably: Scotland dropped from 10th position in 2012 to 15th in 2014. However, this is accompanied by a score increase, therefore suggesting that Sweden's perception of Scotland has improved, if not relative to other countries. Scotland's relative ranking in India remained in the Top 20, but with a decrease in rank (from 16th to 19th) and score. Scotland's rank in China also decreased in relative rank (from 20th to 23rd), but the score remained stable and within the top half of rated countries.

4.11 Scotland's reputation between 2012 and 2014 declined moderately in terms of rank in the UK, Germany, and Mexico, However, this was not accompanied by score decreases, and in the UK and Germany Scotland's overall NBISM score has increased between 2012 and 2014.

4.12 Scotland's reputation remains fairly stable in Japan and South Korea.

Table 1: Scotland's NBISM Rankings by 20 Panel Countries

Panel Countries	Scotland's Rank	Scotland's Score	Panel Countries	Scotland's Rank	Scotland's Score
United Kingdom	6 (5)	65.7 (64.5)	Italy	17 (15)	61 (59.6)
Canada	10 (11)	65.6 (63.5)	Japan	18 (18)	53.9 (53.9)
Australia	10 (12)	64.5 (60.5)	India	19 (16)	66 (64.7)
South Africa	12 (14)	65.7 (64.8)	Poland	19 (17)	61.4 (59.9)
United States	12 (13)	62.7 (61)	South Korea	20 (20)	56.9 (55.4)
France	12 (17)	61.2 (59.2)	Mexico	21 (20)	63.5 (62.6)
Germany	14 (13)	62.3 (61.2)	Turkey	22 (20)	54.8 (54)
Sweden	15 (10)	62.6 (61.2)	China	23 (20)	61.3 (61.4)
Russia	16 (19)	64.7 (61.9)	Argentina	23 (21)	58.5 (57.9)
Brazil	17 (19)	62.1 (59)	Egypt	26 (31)	61.8 (56.2)

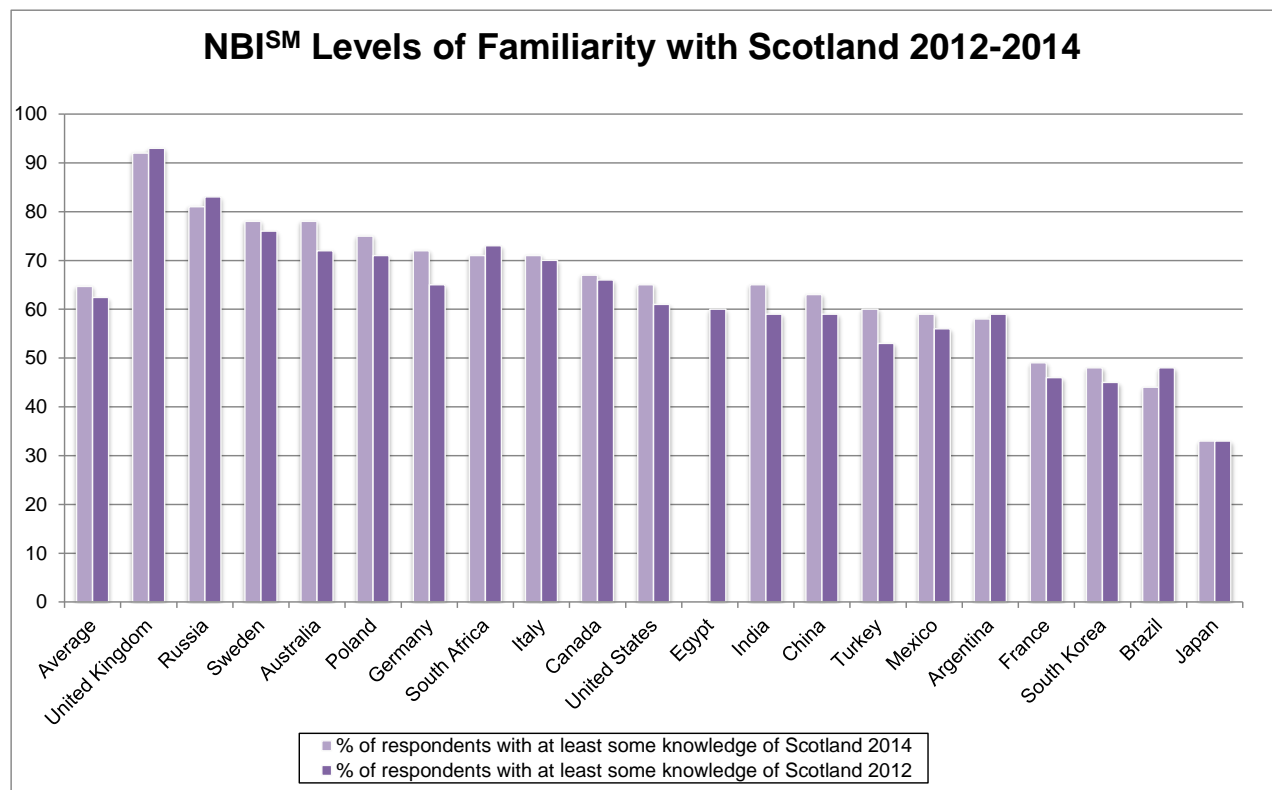
Note: Table 1 reports Scotland's rank and score for 2014. The values for 2012 are provided in brackets.

4.13 Looking at the scores and ranks together is important because they may deliver different messages about Scotland’s reputation. The rank is responsive to changes in the sample of evaluated nations¹⁷ and is informative about the relative rankings in a particular year. However, the score may be regarded as a more reliable indicator of a country’s reputation over time. For instance, as illustrated in Table 1, in many countries where Scotland’s rank has worsened, there was an increase (of one point, or larger) in the score awarded.

Familiarity with and Favourability towards Scotland

4.14 At the start of the NBISM survey, before panellists are asked about the different dimensions, they are asked to rate how well they *know* each nation and how *favourable* they are towards each nation.

Figure 3: NBISM Levels of Familiarity with Scotland 2012-2014



Note: Figure 3 reports the percentage of respondents with at least some knowledge of Scotland.

4.15 Research suggests that how familiar an individual is with a place can positively affect their perceptions.¹⁸ As Figure 3 illustrates, in 2014 the NBISM panel countries on average claim to be slightly more familiar with Scotland than the 2012 sample (average familiarity score of 65 compared to 62 in

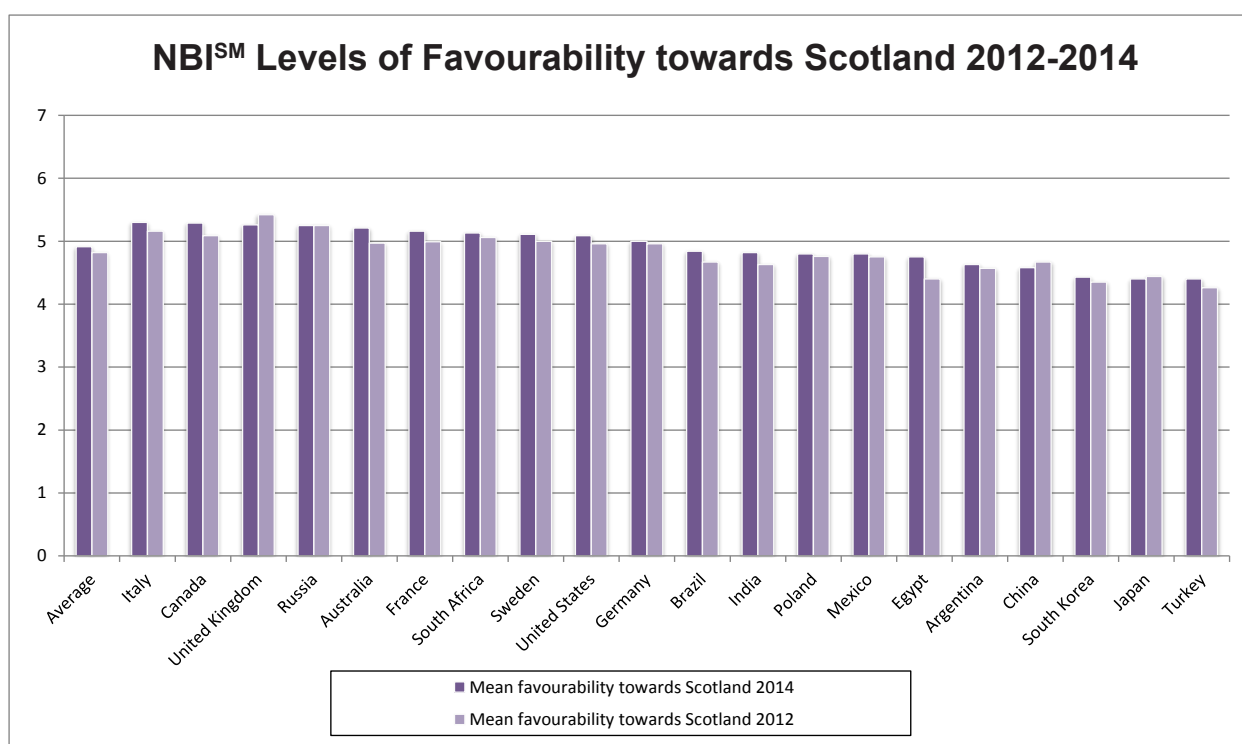
¹⁷ Between 2012 and 2014, four countries (Norway, Ukraine, Puerto Rico and Jamaica) entered the sample, whilst four nations exited (Belgium, Croatia, Malaysia and Georgia.)

¹⁸ TNS System Three, USA Strategy Research Report, The Scottish Government, 2007 (<http://www.scotland.gov.uk/Resource/Doc/198149/0052947.pdf>)

2012). The percentage of respondents with at least some knowledge of Scotland ranges from 33 per cent (Japan) to 92 per cent (UK).

- 4.16 Figure 4 illustrates that levels of favourability towards Scotland remained stable in 2014 compared to 2012. Scotland is ranked 15th (score of 4.91 out of 7) among 50 countries according to favourability scores.
- 4.17 In 2014, 16 out of 20 panel countries were more favourable to Scotland than their national average of favourability towards all rated countries. One (South Korea) was in line, and three countries (Turkey, China and Egypt) had levels of favourability towards Scotland marginally below their national average. It should be noted that all the scores are positive (over 4.0, which is the neutral score in the range from 1 to 7), and no panel nations were unfavourable towards Scotland (giving a score below 4.0).

Figure 4: NBISM Levels of Favourability towards Scotland 2012-2014



How Scotland Sees Itself

- 4.18 The NBISM also asks the Scottish panel to rate Scotland's reputation. The Scottish panel scores and ranks Scotland's reputation as number one. It should be noted that all but one of the panel countries that are ranked in the Top 20 on the NBISM rate their own nation as number one.

Summary

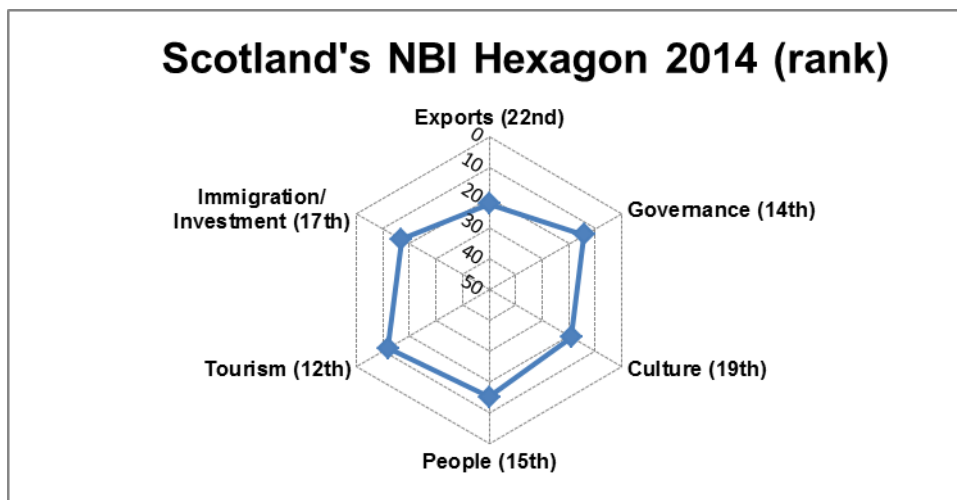
- 4.19 Between 2012 and 2014, Scotland's overall reputation improved in absolute terms, with its position on the NBISM continuing to enjoy a strong and positive reputation as a small, high income liberal Western European democracy. For

the purposes of the Scottish Government's National Performance Framework
Scotland's performance on the indicator 'Scotland's reputation' is regarded as
"improving".

5 SCOTLAND'S SIX DIMENSIONS OF REPUTATION

- 5.1 A country's performance across the dimensions of the NBISM survey can be visualised using the Nation Brands HexagonSM (Figure 5) where each vertex represents one of the six dimensions.
- 5.2 Overall, Scotland has a strong and fairly balanced image, rated as a Top 20 country on five out of the six dimensions, which is comparable to the 2012 results. All dimensions saw an improvement¹⁹ in absolute score in 2014 compared to 2012. Tourism (ranked 12th) saw an improvement in relative ranking (from 13th in 2012), moving from its tied position with Governance in 2012 to be perceived this year as Scotland's strongest reputational feature. Exports (ranked 22nd) remains its weakest point.

Figure 5: Scotland's Performance across Dimensions: NBISM Hexagon 2014



Note: Scotland's rank for each dimension for 2014 is reported in the brackets.

- 5.3 Commonwealth and EU countries tend to rank Scotland more favourably than the rest of the panel, with the UK, on the whole, rating Scotland most positively across the dimensions.
- 5.4 Scotland received no negative scores across the 23 attributes within the six dimensions: each received a score of 4 (neutral) or higher.

Exports

- 5.5 The Exports dimension aims to give a sense of economic strength and potential by asking three questions on a nation's contribution to science and technology; products and services; and being a creative place.

¹⁹ As explained in chapter 3, "improvement" corresponds to an increase in score in excess of one point.

Table 2: Scotland’s reputation for Exports, 2012-2014

	2014		2012	
	Rank	Score	Rank	Score
Exports	22	55.8	22	53.7
Contribution to innovation and science	24	4.2	24	4.0
Products and services	18	4.4	18	4.3
Country as a creative place	21	4.4	23	4.3

- 5.6 Scotland’s overall score for the NBISM Exports dimension was higher in 2014 than 2012, while its relative ranking remained stable. Scores across the three attributes within this dimension also remained stable. However Scotland’s position as a creative place moved up in relative ranking (from 23rd in 2012 to 21st in 2014). Exports remain Scotland’s lowest ranking dimension on the NBISM.
- 5.7 Whilst ranked relatively highly for its products and services, indicating that consumers abroad value the quality of Scottish produce, Scotland’s contribution to innovation in science and technology, and its creativity, are consistently ranked outside the Top 20. However, the score does not reflect a negative, rather “don’t know/neutral” response, suggesting that the respondents did not recognise Scotland for these Exports attributes when thinking about its reputation.
- 5.8 Scotland’s Exports performance is perceived similarly to other similarly-sized Western economies.
- 5.9 In 16 of the panel countries, the perception of Scottish Exports improved in terms of overall score between 2012 and 2014. Scotland continues to receive higher ranks from established, high income panel countries, with UK, USA, Australia and Canada being among those most likely to recognise Scotland’s reputation for exports.
- 5.10 The NBISM survey also includes a word association question for each of the dimensions. For Exports, the panellists most commonly selected “agriculture” (23 per cent), “food” (16 per cent), “crafts” (15 per cent) and banking (11 per cent) as words associated with Scotland’s Exports, which follows the same pattern as 2012.

Governance

- 5.11 The Governance dimension aims to give a sense of perceptions of how a nation is governed domestically – whether the government is competent, honest, and fair to its citizens – and on the international stage via its contribution to global policy issues, such as poverty, environmental protection, and international peace.

Table 3: Scotland's reputation for Governance, 2012-2014

Governance	2014		2012	
	Rank	Score	Rank	Score
	14	62.2	13	59.9
Competent and honest	15	4.7	15	4.6
Fair and respectful of citizens' rights	14	5.0	13	4.8
International peace and security	14	4.8	13	4.7
Environmental protection	14	4.7	13	4.6
Efforts to reduce global poverty	16	4.4	15	4.2

5.12 Governance continues to be perceived as one of Scotland's strongest national competencies, experiencing an improvement in its NBISM score in 2014, although it is marginally outranked this year by Tourism, taking position as Scotland's second strongest reputational feature. There has been a moderate change in rank.

5.13 Scotland has maintained its reputation as being competently and honestly governed, and four of the five NBISM attributes within this dimension are ranked within the Top 15 countries. Scotland's highest ranking attributes continue to be around its contribution to international peace and security (14th), its global efforts towards the environment (14th) and its fair treatment of its people (14th). Its lowest ranking element relates to its contribution to reducing world poverty (16th) but it is still ranked in the top twenty nations for this attribute.

5.14 The majority of panel countries rank Scotland's reputation for Governance in the Top 15. As with most dimensions, the most favourable ranking position is awarded by the UK (5th). Australia, the US, South Africa, and Canada also place Scotland in their Top 10 for Governance. Scotland is positioned firmly amongst other Western democracies.

5.15 On the word association question for Governance panellists could select a single answer from a list of eight words. The most commonly selected terms in 2014 were the same as 2012: "trustworthy" (21 per cent), "reliable" (21 per cent), and "reassuring" (13 per cent).

Culture

5.16 The Culture dimension measures three elements of a nation's cultural reputation: its cultural history and heritage; its contemporary culture; and its sporting excellence.

Table 4: Scotland’s reputation for Culture, 2012-2014

Culture	2014		2012	
	Rank	Score	Rank	Score
	19	59.1	17	57.9
Excellence at sports	28	4.1	27	4.0
Cultural heritage	11	5.0	12	4.9
Contemporary culture	16	4.5	15	4.4

- 5.17 Although the relative perception of Scotland’s Culture has dropped two positions between 2012 and 2014, influenced by small relative score increases across the sample of evaluated countries, there has been a sizeable increase in NBISM score in 2014 compared to 2012.
- 5.18 Scotland is continuously recognised as rich in cultural heritage. This attribute has seen an increase in relative ranking compared with 2012. Scotland is also seen as an interesting and exciting place for contemporary culture. Scotland’s reputation for both these attributes continues to be ranked in the Top 20. However, it does not perform as well on the index for sporting excellence. Ranked 28th, excellence at sports is Scotland’s lowest ranking attribute. Even Scottish respondents themselves rank Scotland’s sporting excellence 12th – the only attribute for which Scotland awards itself a rank outside the Top 5 (although this is an improvement on 2012 when Scotland ranked itself 14th).
- 5.19 Nonetheless, alongside its small nation comparators, Scotland continues to perform very well. It is one of only two from this set of countries to feature in the Culture dimension’s Top 20.
- 5.20 As in previous years, Commonwealth panel countries tend to have a more positive perception of Scotland’s culture, with the UK, Australia, South Africa and France ranking it in their Top 15.
- 5.21 As in previous years, the most commonly chosen words for Culture were: “museums” (27 per cent), “music” (21 per cent), and “sports” (17 per cent). Other word associations, such as “sculpture”, “street carnival”, “films” and “modern design” were also selected by more than ten per cent of the respondents.

People

- 5.22 The People dimension explores panellists’ perceptions of how welcoming, friendly, and employable the people from the evaluated nations are.

Table 5: Scotland’s reputation for People, 2012-2014

People	2014		2012	
	Rank	Score	Rank	Score
	15	65.1	14	63.9
Make one feel welcome	9	4.9	11	4.8
Friendly	13	4.9	11	4.8
Valuable employees	18	4.9	17	4.9

- 5.23 Scotland continues to be highly regarded for its people, with Scotland’s reputation in this respect continuing to feature in the Top 15 rated countries and all attributes across this dimension featuring in the Top 20. This dimension sees a score increase from 2012, albeit, accompanied by a moderate decrease in rank, however the overall picture remains stable with this dimension continuing to be Scotland’s third strongest reputational feature.
- 5.24 Scores have remained stable across the attributes, although with some decreases in rankings compared with 2012. The perceived extent to which Scotland makes people feel welcome has improved, however, relative to other countries: Scotland is now positioned 9th (up from 11th in 2012).
- 5.25 Scotland’s people are perceived similarly to other small, high income, liberal Western European democracies on the index.
- 5.26 As in 2012, English-speaking countries (namely, Australia, Canada, the UK and the US) together with Sweden, France and South Africa, hold the highest regard of the Scottish people, all ranking Scotland in their respective Top 10.
- 5.27 Whilst the employability of the Scottish people (ranked 18th in 2014, down from 17th in 2012) is perceived less positively than their relative welcome and friendliness, the word association question reveals that Scottish people are known for their positive working attitude. Scottish people are most often described as “hard-working” (chosen by 27 per cent of the respondents), “honest” (22 per cent), and “skilful” (21 per cent), although descriptions such as “fun” and “tolerant” are also commonly selected (by 18 and 16 per cent of the respondents, respectively).

Tourism

- 5.28 The Tourism dimension aims to evaluate panellists’ perception of a country’s attractiveness as a tourist destination. The survey asks the respondents about: their willingness to visit the country should money be no object; their opinion about its richness in natural beauty as well as its historic buildings and monuments; and whether they perceive its cities to be vibrant.

Table 6: Scotland's Reputation for Tourism, 2012-2014

Tourism	2014		2012	
	Rank	Score	Rank	Score
	12	68.6	13	67.4
Would one visit if money were no object	13	5.3	14	5.2
Natural beauty	7	5.4	7	5.3
Historic buildings and monuments	12	5.0	12	5.0
Vibrant cities and urban attractions	22	4.8	22	4.7

5.29 Tourism remains as one of the key perceived strengths of Scotland's reputation, outranking all other five dimensions in 2014. Scotland has seen an increase in both overall score and relative rank (from 13th to 12th) for this dimension compared to 2012.

5.30 Compared to 2012, there are no noticeable changes in the scores on the four attributes within this dimension. Natural beauty continues to be perceived as Scotland's strongest characteristic: Scotland continues to be ranked 7th. Respondents' willingness to visit, as well as their perception of Scotland's historic heritage, remain highly ranked (13th and 12th, respectively), with willingness to visit ranking more highly than in 2012 (14th). The appeal of Scottish cities remains relatively weaker but stable compared to 2012.

5.31 Scotland's reputation for Tourism continues to outperform other small, high income, liberal Western European democracies on the index.

5.32 Eight of the panel countries rank Scotland in their Top 10 for Tourism in 2014. The most favourable ranking position is awarded by the UK (3rd). Scotland's reputation for Tourism in France has seen a notable increase in rank this year, moving from 11th in 2012 to 7th in 2014. Australia, Canada, Germany, Italy, South Africa, and Sweden also place Scotland in their Top 10 for Tourism.

5.33 From the selection of ten words available to panellists, the most frequently chosen to describe Scottish Tourism's reputation were "fascinating" (29 per cent), "exciting" (25 per cent), "educational" (22 per cent), "relaxing" (22 per cent) and "romantic" (18 per cent).²⁰ This is unchanged from 2012.

Immigration and Investment

5.34 The Immigration and Investment dimension aims to summarise whether the respondents perceive a nation to be good to live, work, study, and invest in.

²⁰ More than one choice of words was allowed.

Table 7: Scotland’s Reputation for Immigration and Investment, 2012-2014

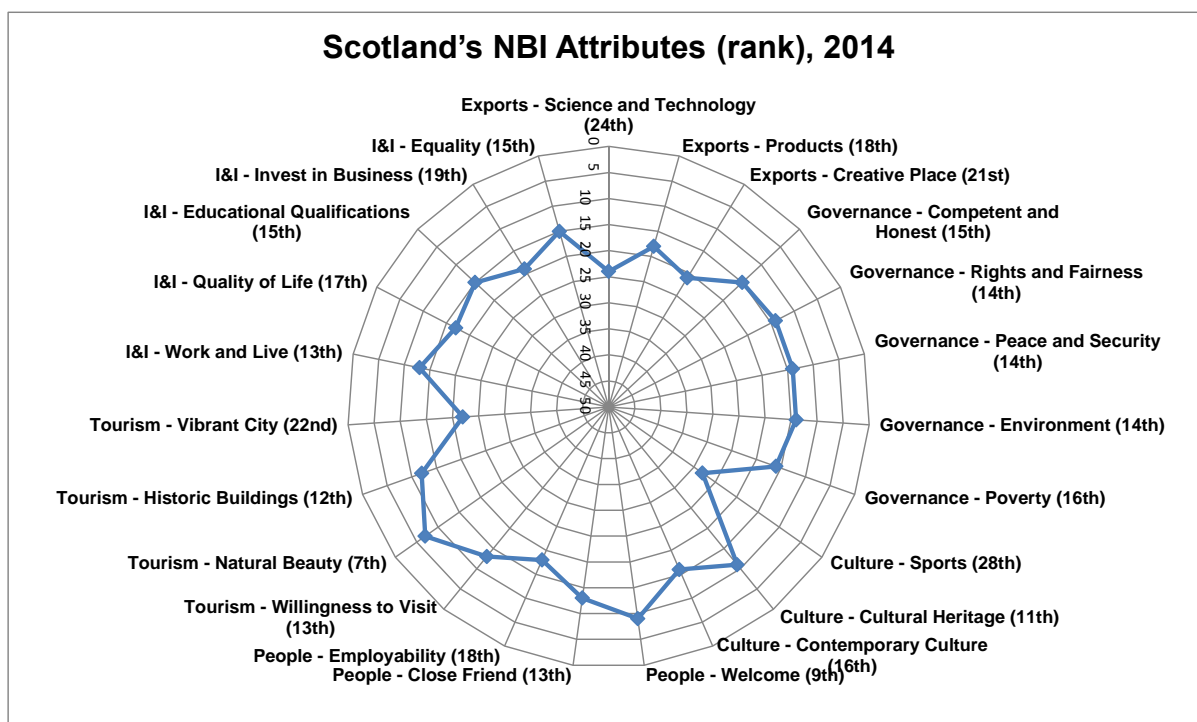
Immigration/Investment	2014		2012	
	Rank	Score	Rank	Score
	17	59.9	15	57.9
Willingness to live and work	13	4.5	13	4.3
Quality of life	17	4.9	16	4.8
Educational qualifications	15	4.6	15	4.5
Business to invest in	19	4.2	19	4.1
Equal opportunity	15	4.7	14	4.6

- 5.35 Scotland’s score for the Immigration/Investment dimension has seen a real improvement of 2 points from 2012, although the relative ranking has dropped from 15th to 17th in 2014 due to changes in the sample of countries included in the 2014 Index and a marginal relative score increase in another country in the Top 20.
- 5.36 Across the five dimensions, the picture remains fairly stable with no noticeable score increases in 2014, three dimensions retaining their 2012 rank and all five dimensions ranking in the Top 20. Two attributes see a moderate decrease in relative rank due to changes in the countries included in the 2014 index. Respondents’ willingness to work and live in Scotland (13th in both years) remains the strongest attribute within this dimension, and Scotland’s reputation as an attractive place to do business remains the weakest.
- 5.37 Consistent with 2012, the majority of the EU (France, Germany, Sweden, and the UK) and Commonwealth (Australia, Canada, and South Africa) panel countries, as well as the US, rank Scotland in their respective Top 15 for Immigration and Investment. The remaining panel countries rank Scotland in the Top 20, with the exception of Egypt which puts Scotland in 21st position for Immigration and Investment opportunities, although this is a significant improvement on 2012 (when Egypt ranked Scotland 26th).
- 5.38 Scotland’s reputation for immigration and investment is perceived similarly to other small, high income, liberal Western European democracies on the index.
- 5.39 Again, similar to 2012 results, the most commonly selected words to describe Scotland’s economic and business environment were “modern” (selected by 21 per cent of respondents), “forward-thinking” (14 per cent) “developing” (12 per cent), and “ambitious” (10 per cent).

Summary

- 5.40 As outlined in Chapter 3, across the six NBISM dimensions, respondents were asked 23 questions. Using the concept of the NBISM hexagon, these attributes are visually summarised in Figure 6, where the centre of the circle represents the position of rank 50, and the outer circle represents the first (and most reputable) position.

Figure 6: Scotland's Reputation across 23 Attributes (rank), 2012



Note: Scotland's rank for each attribute for 2014 is reported in the brackets.

- 5.41 Figure 6 shows that when all six NBISM dimensions of Scotland's reputation are considered, Tourism, Governance, and People continue to be the dimensions most recognised by the panellists from around the world.
- 5.42 For the most part, panellists from across the world are able to distinguish between the different aspects of Scottish reputation, reflected in differing rankings across the dimensions. Panellists from certain nations appear more familiar with Scotland and are therefore better able to judge its strengths. In Scotland's case, English-speaking countries, European neighbours, Commonwealth nations, and the UK in particular, are the most favourable and familiar with Scotland's reputation.

6 CONCLUSION

- 6.1 Scotland's score and rank on the Nation Brands IndexSM show that it continues to have a strong reputation abroad. Scotland's score and rank place it alongside and sometimes ahead of other comparator small, high income Western nations. Scotland is firmly in the Top 20 rated nations.
- 6.2 This is the first time the available Scotland data have shown an improvement in Scotland's overall score since the indicator's baseline year (2008). For the purposes of the Scottish Government's National Performance Framework, the indicator for Scotland's reputation is "improving".
- 6.3 Scotland's reputation, in terms of score, has improved compared with 2012 across all dimensions, with Tourism also seeing an improvement in terms of relative rankings. Other dimensions of Scotland's reputation have dropped moderately in relative rankings since 2012.
- 6.4 Tourism, with Governance a close second, remains to be perceived as Scotland's main strength in the international arena. Its People, as well as Immigration and Investment opportunities, are favourably ranked. Except for Scotland's reputation in sporting excellence, Scottish Culture also has a good international reputation, outperforming other small, high income Western nations.
- 6.5 Exports remain the only dimension of reputation where Scotland is ranked outside the Top 20.
- 6.6 The NBISM data provides an indication of how Scotland is perceived abroad. It indicates that Scotland's international image is strong across various dimensions, and is overall stable over time, with signs of improvement.

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