

The Anholt-Ipsos Nation Brands IndexSM: 2022 Report For Scotland

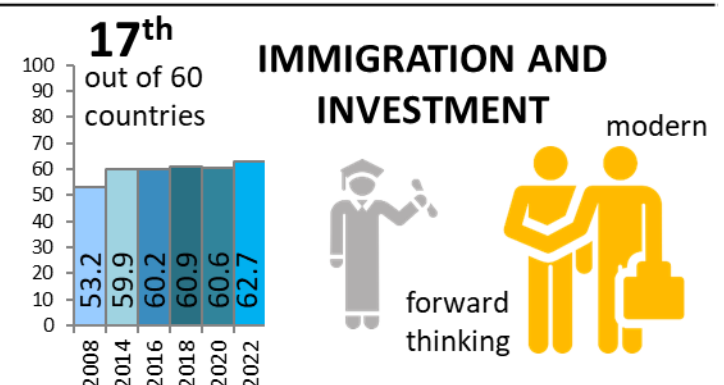
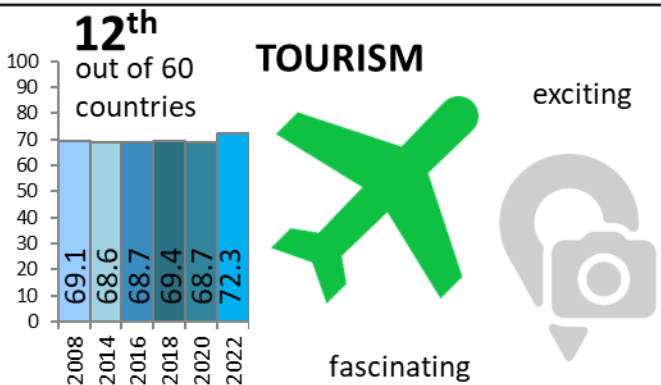
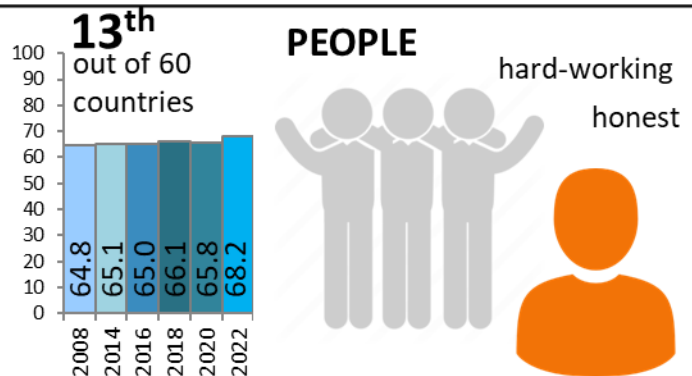
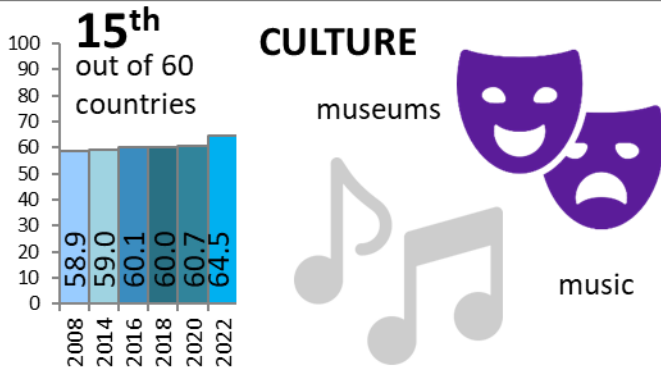
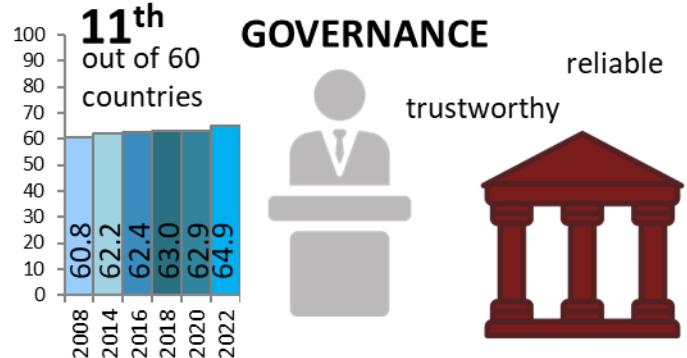
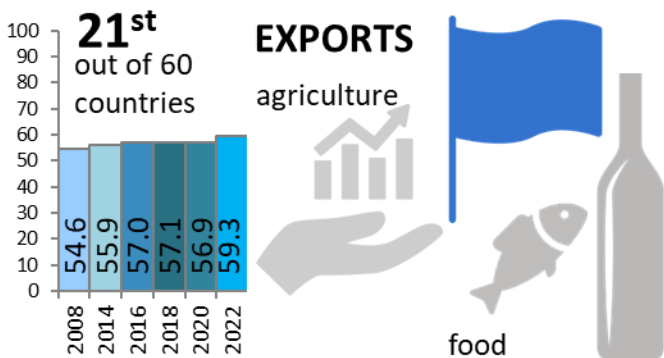
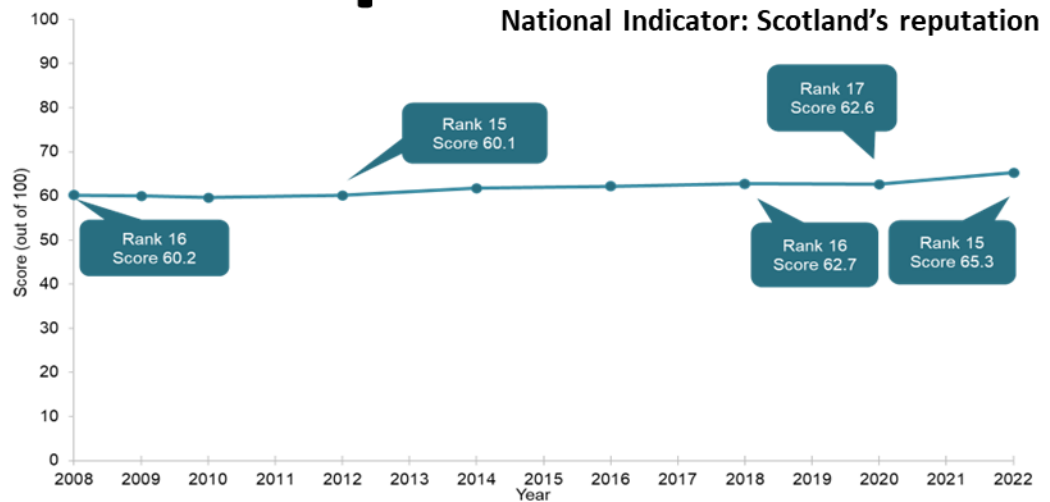
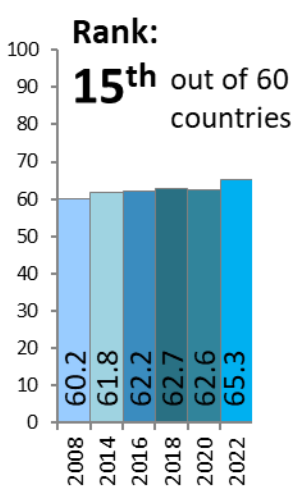
**Scottish Government Constitution,
International and Migration Analysis**

February 2023

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Scotland's Reputation 2022



'Scotland's Reputation' is one of the indicators of progress on the Scotland's National Performance Framework. Since 2008, the Scottish Government has used the Anholt-Ipsos Nation Brands IndexSM to assess Scotland's reputation around the world. The data allow for an understanding of how Scotland is perceived in 20 countries around the world; and how it compares to other countries included in the Nation Brands IndexSM.

Executive summary

Since 2008, the Scottish Government has used the Anholt-Ipsos Nation Brands IndexSM (NBISM) to assess and monitor how Scotland is perceived around the world. The NBISM examines the image of 60 nations¹ by looking at a country's reputation along **six dimensions of national competence**: *Exports, Governance, Culture, People, Tourism, Immigration and Investment*. Together these provide an overall indication of a nation's reputation. Until 2020, approximately 20,000 adults aged 18 and over, in 20 core panel countries were interviewed online. In 2021, the overall sample size increased to approximately 60,000 adults.² The fieldwork takes place over July and August.

Data from the NBI is used to update one of the Scottish Government's 81 National Performance Framework (NPF) Indicators on '**Scotland's reputation**'.³ National Indicators enable Scotland to track progress towards the achievement of its eleven National Outcomes outlined in the NPF. The 'Scotland reputation' indicator is used to inform the 'International' National Outcome.⁴

Scotland subscribed to the survey annually in 2008, 2009 and 2010, and thereafter biennially in 2012, 2014, 2016, 2018, 2020 and 2022. Scotland did not subscribe to the 2011, 2013, 2017, 2019, and 2021 surveys, but was included in the sample of evaluated countries in these years.

The data provide snapshots in time. Over a number of years, these snapshots can track Scotland's reputation in the longer-term. Data can also be used to compare Scotland's reputation with that of other countries, and to monitor how Scotland sees itself. However, data cannot be used to evaluate performance of specific Scottish Government directorates, agencies or policies.

The rank and scores together provide an overall indication of a country's reputation. The rank is informative of a country's reputation relative to other countries, and may change in relation to other countries' performance. The score provides a more absolute understanding of how a country is viewed overall and by each of the individual panel countries. The score therefore may be regarded as a more reliable indicator of a country's reputation over time. Looking at the scores and ranks together is useful, as individually they may deliver different messages about a country's reputation and performance over time. For example, whilst a country's score may decrease between two years, its rank may increase over this period and vice versa.

¹ This used to be 50 nations – in 2021, 10 new nations were added to the survey taking the total up to 60.

² Each country receives around 500 responses per panel country.

³ [National Performance Framework](#)

⁴ [National Performance Framework – What it is: An overview of the framework](#)

Key findings from the 2022 data include:⁵

Scotland's overall position

- Scotland received an **overall score of 65.3** (out of 100 points) and **ranked 15th** (out of 60 nations).
- Scotland's absolute score has improved, going from 62.6 in 2020 to 65.3 in 2022, and Scotland's relative rank has also improved by two places since 2020 (from 17th in 2020 to 15th in 2022).
- Scotland's National Performance Framework Indicator on 'Scotland's reputation' is now 'improving' as the increase in Scotland's score is above the 1.0 point threshold.⁶

How other countries score and rank Scotland

- Generally, respondents in Commonwealth, English speaking and European countries ranked Scotland highest, with those in the United Kingdom⁷ and the United States ranking Scotland 4th and 9th respectively. Respondents in both Canada and Sweden ranked Scotland 11th.
- Scotland received the highest overall scores from respondents in India (73.5), South Africa (71.4) and China (71.2).
- Scotland was ranked lowest by respondents in Saudi Arabia, South Korea and Argentina, and received the lowest overall scores from respondents in Japan, South Korea and Russia.

Dimensions and attributes

- Scotland is rated as a Top 20 country on five of the six dimensions of reputation. Scotland's strongest dimension in 2022 was Governance, on which Scotland ranked 11th out of 60, with a score of 64.9 (up from 62.9 in 2020).
- Scotland's overall scores improved across all six dimensions. Scotland's ranks improved across four of the six dimensions (Exports, Governance, Culture, People) and maintained across two dimensions (Tourism, and Immigration and Investment).
- Scotland's weakest dimension was Exports. This is Scotland's only dimension to rank outside of the Top 20 (21st). Exports also received the lowest overall score (59.3) across Scotland's six dimensions.
- Within the dimensions, Scotland fares relatively well in the rating of individual attributes. Natural beauty continues to be perceived as Scotland's strongest attribute, ranking 7th out of the 60 nations (and being the highest scoring attribute –

⁵ Increases and decreases have not been significance tested.

⁶ Any difference within +/- one point of the previously available figure (Scotland has subscribed to the NBISM biennially since 2010) suggests that the position is more likely to be maintaining than showing any change. A reduction of one point or more suggests the position is worsening while an increase of one point or more suggests the position is improving.

⁷ The United Kingdom sample includes Scotland.

5.6 out of 7.0). Scotland ranked 9th for how welcoming the people of Scotland are, and 10th in relation to international peace and security and historic buildings and monuments.

Familiarity and favourability

- At the start of the NBISM survey, respondents are asked to rate how familiar and how favourable they are towards each country. Familiarity with Scotland has increased from 67 per cent of respondents having some knowledge of Scotland in 2020 to 68 per cent in 2022. The most noticeable increase in levels of familiarity was seen from respondents in Japan, Poland and Turkey. Overall, Scotland ranked 24th for familiarity, down from 21st in 2020.
- Favourability towards Scotland improved between 2020 and 2022. All 20 core panel countries gave Scotland a favourability score of 4.5 or more (on a 1.0 to 7.0 point scale) in 2022, suggesting that Scotland is viewed comparatively positively by all panel countries. Scotland's overall score for favourability was 5.0 (compared to 4.9 in 2020), and it was ranked 13th out of 60 (up by one place since 2020).

Demographic trends

- Women scored Scotland higher than men across the Culture, People, and Tourism dimensions. Men scored Scotland higher than women across the Exports, Governance, and Immigration and Investment dimensions.
- Overall, respondents in the older age groups (45 years and over; and 30-44 years) tended to have a more positive image of Scotland than individuals in the youngest age group (18 to 29 years). Those aged 30 to 44 years scored Scotland higher than the other age groups across four out of the six dimensions. Across two dimensions the scores from the two older age groups were tied.
- The more exposure respondents have had to Scotland (through visits or contact with websites) the more likely they were to be favourable towards Scotland, and to score Scotland higher on all the dimensions and on familiarity.
- Business/executives scored Scotland higher than those in other occupations.
- In nearly every one of Scotland's dimensions and their underlying attributes across the survey, similar patterns are seen for these demographic groups.

How Scotland sees itself

- Scottish respondents scored Scotland marginally lower in 2022 than they did in 2020 (75.9 and 75.8 respectively), and continued to rank Scotland 1st out of the 60 nations.

Introduction

Scotland's National Performance Framework (NPF) sets out in its purpose, values and National Outcomes, a clear, unified vision for Scotland. The purpose of the NPF is “to focus on creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing and sustainable and inclusive economic growth”.⁸

A wide range of National Indicators (81 in total) are used to assess progress towards the purpose, values and the different National Outcomes. These provide a broad measure of national wellbeing, incorporating a range of economic, social and environmental indicators. Scotland's National Outcome for International – as part of the NPF – is that ‘we are open, connected and make a positive contribution internationally’. One of the six indicators for this National Outcome aims to assess and monitor **Scotland's reputation** internationally.

The way a country is perceived can make a difference to the success of its business, trade and tourism efforts, as well as its diplomatic and cultural relations with other countries. Given a changing global context, there is a need to better understand how Scotland is seen and thought about by other countries.

Since 2008 the Scottish Government has used the Anholt-Ipsos Nation Brands IndexSM (NBISM) to measure Scotland's reputation internationally. Conducted annually since 2008, the NBISM examines the reputation of 60 countries.⁹ As of 2021, approximately 60,000 adults,¹⁰ aged 18 and over, in 20 core panel countries are interviewed online. The fieldwork takes place over July and August each year.

There has been one change to the 20 panel countries between 2020 and 2022 as Egypt has been replaced by Saudi Arabia. The 60 nations whose reputation is measured change between years. See the methodology report found in the supporting files alongside this publication for further details.

The NBISM attempts to measure and rank a country's broad reputation along six dimensions of national competence, all of which are weighted equally. Scotland's NBISM score is presented as a score out of 100, calculated as an average of the scores given for the six underlying dimensions. The six dimensions are: *Exports, Governance, Culture, People, Tourism, and Investment and Immigration*.

The rank and scores together provide an overall indication of a country's reputation. Looking at the scores and ranks together is useful, as individually they may deliver different messages about Scotland's reputation.

⁸ [National Performance Framework](#)

⁹ This used to be 50 countries – in 2021, 10 new countries were added to the list bringing the total to 60.

¹⁰ The total sample size used to be 20,000 until 2020 – since 2021 the sample size has been 60,000. Each nation receives around 500 responses per panel country.

The **rank**¹¹ is informative of a country's reputation relative to other countries, and may change in relation to other countries' performance.

The **score**¹² may be regarded as a reliable indicator of a country's reputation over time.

In general, panel countries which give Scotland a high score also tend to give it a high rank (and countries which give it a low score, a low rank). However it is possible for countries to give a combination of high score and low rank and vice versa.

If a panel country tends to give higher scores in general to all countries, they may give Scotland a high score but not necessarily a high rank (for example India); countries which give lower scores overall may give Scotland a low score but not necessarily a low rank (for example France).

The data allow for an understanding of how Scotland is perceived by an online sample of respondents in 20 panel countries around the world, how an online sample of 500 people from Scotland perceive Scotland itself, and how these self-perceptions compare with those of respondents from other countries included in the NBISM.

While 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. NBISM data should be viewed as a snapshot of people's attitudes and perceptions of Scotland at a particular point in time, which are useful in helping us to understand more about Scotland's international reputation.

Scotland subscribed to the survey annually in 2008, 2009 and 2010, and thereafter biennially in 2012, 2014, 2016, 2018, 2020 and 2022. Scotland did not subscribe to the 2011, 2013, 2017, 2019, and 2021 surveys, but was included in the sample of evaluated countries in these years.

This report will compare the 2022 data to the most recent previously available data in 2020, as well as previous years where relevant. Any increase or decrease mentioned in this report has not been significance tested. Annex A, within the methodology report, provides details of how the Scottish Government has adopted some aspects of the Code of Practice for Official Statistics on a voluntary basis for the Nation Brands IndexSM: 2022 report for Scotland.

In line with the National Performance Framework guidelines, assessment of any change in Scotland's reputation is based on Scotland's absolute NBISM score as it compares to that of the previous year. An increase of one point or more in Scotland's absolute NBISM score

¹¹ All rankings presented in the report are out of 60.

¹² The overall score for each of the dimensions is out of 100, while the score for each of the attributes is an average of respondents' scores, based on a scale from 1.0 to 7.0 (1.0 being the lowest and worst and 7.0 being the highest and best).

suggests that the indicator is “improving”, whereas a decrease of one point or more in Scotland's absolute NBISM score suggests that the indicator is “worsening”.

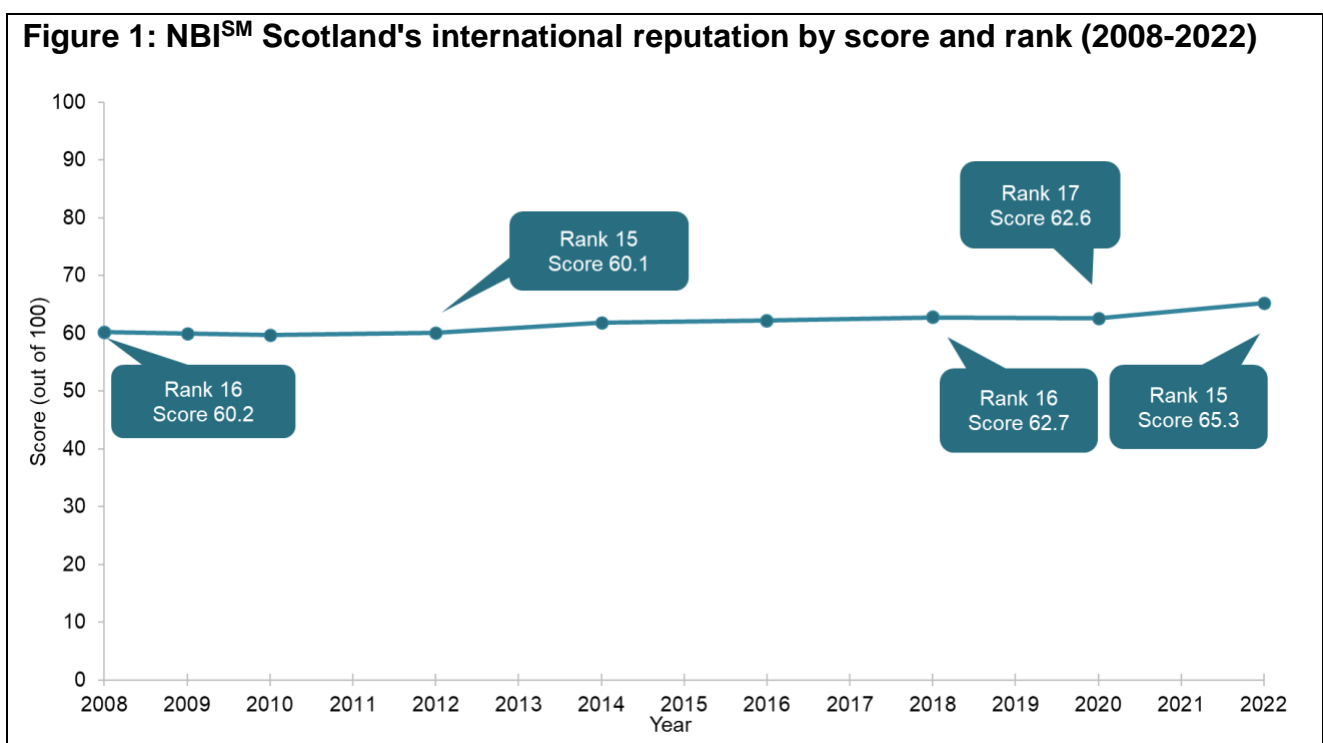
This report will comply with these guidelines and will only consider an increase or decrease in Scotland's absolute NBISM score if it exceeds one point, otherwise it will treat the indicator as “maintaining”.

Scotland's reputation overall

Scotland's position on the NBISM

Scotland's 2022 score of 65.3¹³ and rank of 15th places Scotland in the Top 20 countries indicating that Scotland has a high level of international recognition.¹⁴ Scotland's overall reputation in terms of the NBISM score has improved¹⁵ between 2020 and 2022 (62.6 and 65.3 respectively). Figure 1 shows that Scotland's relative rank has increased by two places since 2020 (from 17th in 2020 to 15th in 2022).

When looking at scores, Scotland's reputation was maintained at the same level between 2008 (when Scotland joined the survey) and 2012, and then generally improved between 2012 and 2022. See Figure 1.



Scotland's score of 65.3 places Scotland in the 7th decile of countries measured,¹⁶ far closer to the country with the top score of 69.8 than the country with the bottom score of 47.4. Countries that did better than Scotland and ranked in the Top 10 were Germany,

¹³ The NBISM score is an average of the scores from the six NBISM dimensions.

¹⁴ Figures have been rounded to one decimal place.

¹⁵ Any difference within +/- one point of the previously available figure (Scotland has subscribed to the NBI biennially since 2010) suggests that the position is more likely to be maintaining than showing any change. A reduction of one point or more suggests the position is worsening while an increase of one point or more suggests the position is improving.

¹⁶ A decile is any of the nine values that divide the sorted data into ten equal parts, so that each part represents 1/10 of the sample or population.

Japan, Canada, Italy, France, United Kingdom, Switzerland, the United States, Sweden, and Australia.¹⁷

Table 1 shows how people in different demographic groups score and rank Scotland. With regard to gender, men tended to score Scotland's reputation slightly higher than women (65.6 and 65.1 respectively). Notably, respondents in the 30 to 44 years age group (66.7) tended to score Scotland's reputation higher than respondents between the ages of 18 and 29 years (64.3) and 45 years and over (64.9).

In relation to occupation, the data only allow disaggregation between business/executives and other occupations.¹⁸ Those in the former group tended to view Scotland more positively in terms of Scotland's reputation score (69.7) than those in other occupations (63.6). However, across the NBISM dataset, business/executives tended to give all countries a higher score overall (on average 5.5 points higher) than those in other occupations. See Table 1.

Additionally, those who have had some exposure to Scotland, whether having visited a Scottish website (69.2) or having visited Scotland for business and/or holiday (67.6), scored Scotland's reputation higher than those with little or no exposure to Scotland. See Table 1.

¹⁷ Find rankings of all 60 nations here: [Ipsos Press Release on the Nation Brands Index \(2022\)](#)

¹⁸ The Business/Executive audience consists of respondents who have a manager / senior official or professional level occupation.

Table 1: Scotland’s international reputation by gender, gender, age, occupation and tourism (2022)

	Rank	Score
Gender		
Male	16	65.6
Female	14	65.1
Age		
18-29	16	64.3
30-44	16	66.7
45+	16	64.9
Occupation		
Business/Executives	17	69.7
Other	15	63.6
Visited Scotland		
Yes	17	67.6
No	14	61.8
Visited a Scottish Website		
Yes	17	69.2
No	15	61.1

In nearly all of Scotland’s dimensions and their underlying attributes, similar patterns were seen across the demographic groups. See Annex A within this report for summary findings on each of Scotland’s dimensions and their underlying attributes broken down by demographic group.

Scotland’s reputation in the 20 core panel countries¹⁹

In 2022 Scotland received its highest overall scores for reputation from respondents in India (73.5), South Africa (71.4) and China (71.2). The lowest overall scores for Scotland were received from respondents in Japan (56.0), South Korea (58.8) and Russia (59.8).

Figure 2 shows Scotland’s 2022 rank by each of the 20 core panel countries, and how this compares with 2020. In 2022 the highest overall ranks for Scotland were received from respondents in the United Kingdom (4th), the United States (9th), and Canada and Sweden (both 11th). The lowest overall ranks for Scotland were received from respondents in Saudi Arabia (31st), Argentina and South Korea (both 21st), and India (20th).

Scotland’s score in 2022 was higher in seventeen countries than it had been in 2020, most notably in Turkey and South Africa. Scotland’s score was lower in two countries in 2022 than it had been in 2020, with the biggest decrease recorded by Russia.

In 14 countries (the United States, Sweden, Canada, Germany, Italy, France, Poland, China, Brazil, Japan, Russia, Mexico, Turkey, and India) Scotland’s rank was higher in 2022 than it was in 2020. Scotland’s rank remained stable in two countries (South Africa

¹⁹ The 20 core panel countries do not include Scotland as a panel country.

and South Korea) and was lower in three countries (the United Kingdom, Australia, and Argentina) between 2020 and 2022. See Figure 2.

In two countries (Australia and Argentina) Scotland's rank was lower in 2022 compared to 2020, but the reputational scores were higher. In Russia the score was lower in 2022, but the rank was higher.

We can see from the results above that the distribution of scores can vary considerably depending on the particular panel country. For example, Scotland received its highest overall score from India (73.5) however this contrasted with India's relatively low rank for Scotland (20th). This tells us that India scores most countries highly. As mentioned previously, it is useful to look at the scores and ranks together, as individually they may deliver different messages about a country's reputation/performance. See Figure 3.

Figure 2: NBISM Scotland's rank by 20 panel countries (2020 and 2022)

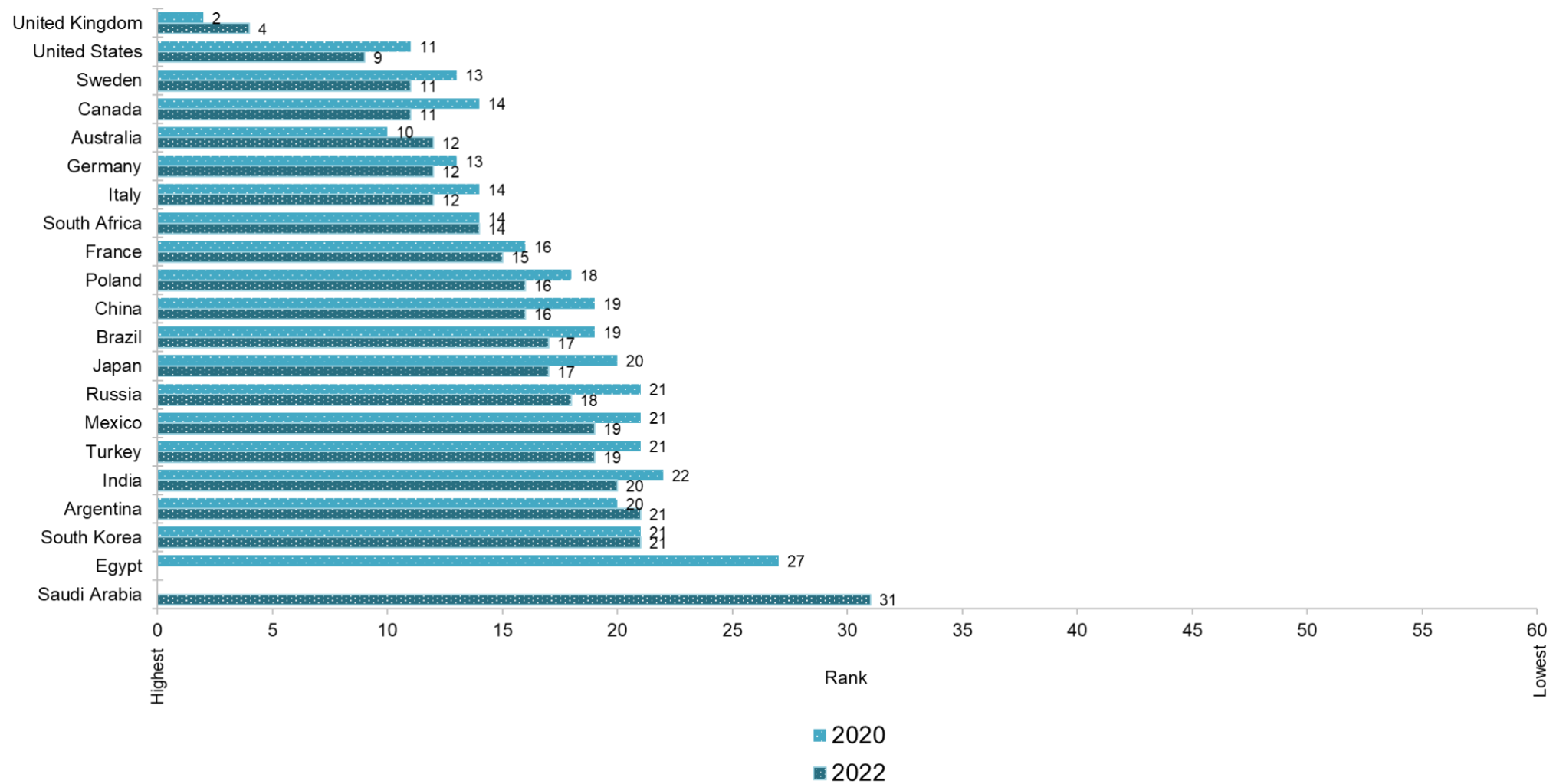
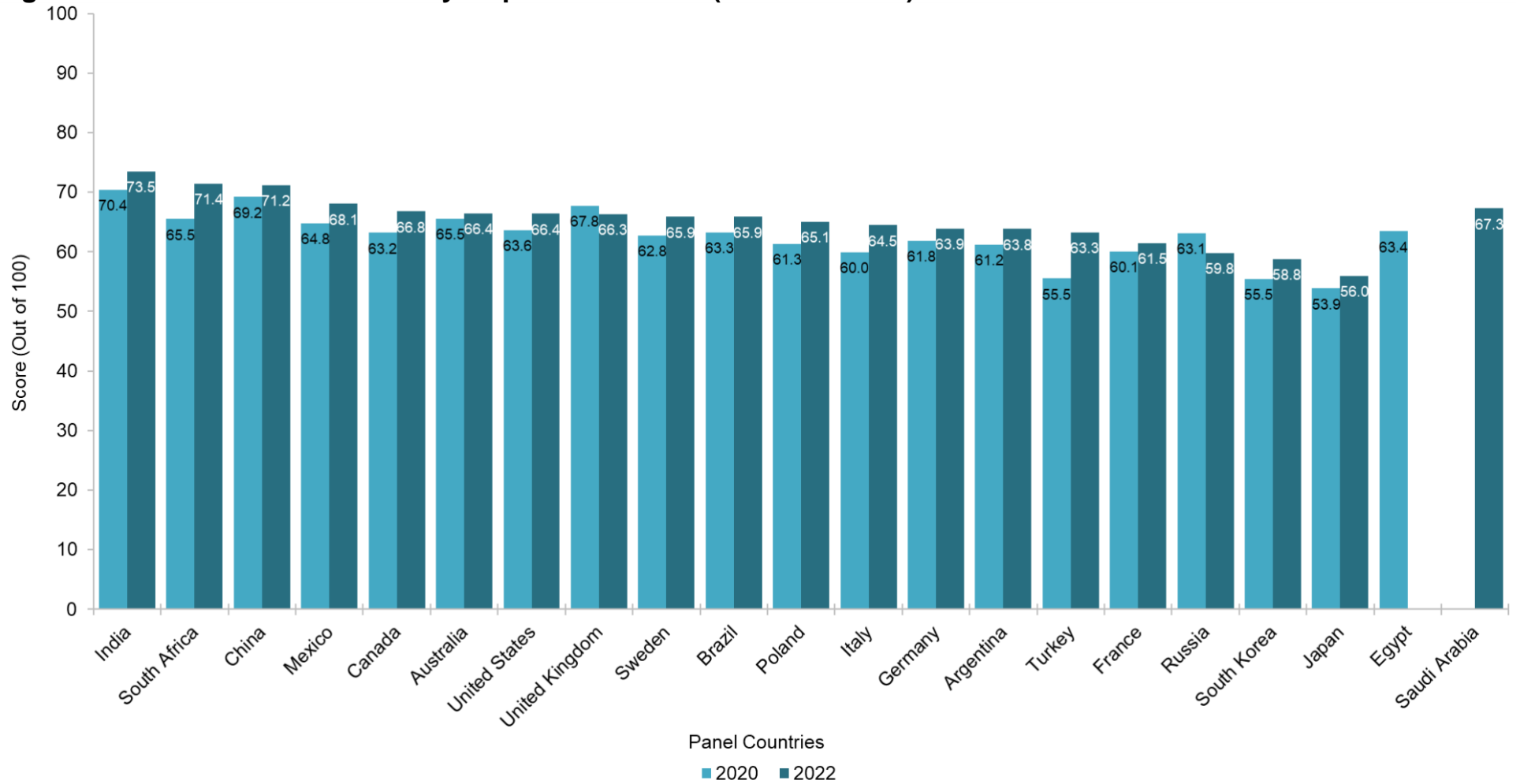


Figure 3: NBISM Scotland's score by 20 panel countries (2020 and 2022)



Familiarity with Scotland

At the start of the NBISM survey, respondents are asked to rate how familiar they are with each country. Familiarity is presented as the percentage of respondents who had at least some knowledge of Scotland.

Table 2 shows that in 2022 68 per cent of respondents reported being familiar with Scotland, resulting in a familiarity ranking of 24 out of 60. Whilst Scotland's ranking has decreased between 2020 and 2022 (from 21st to 24th), there has been an increase in score: in 2020, 67 per cent of respondents reported being familiar with Scotland.

Table 2: NBISM Familiarity with Scotland (2020 and 2022)

	Familiarity	
	Rank	Score
2020	21	67
2022	24	68

Variations between panel countries

Figure 4 shows levels of familiarity with Scotland across the 20 panel countries in 2020 and 2022. European countries tended to be the most familiar with Scotland in 2022 with 94 per cent of respondents from the United Kingdom,²⁰ 86 per cent from Sweden, 85 per cent from Poland having at least some knowledge of Scotland. Eighty-two per cent of respondents from Australia also had at least some knowledge of Scotland. There was one notable exception among European countries, however – when looking at the score, respondents in France were the fourth least familiar with Scotland (48 per cent) in 2022. Nonetheless, France's 60-nation average familiarity score of 42 per cent demonstrates that respondents from France have low levels of familiarity with the 60 measured nations. However, respondents from France are more familiar with Scotland than with most of the measured nations, ranking it 16th.

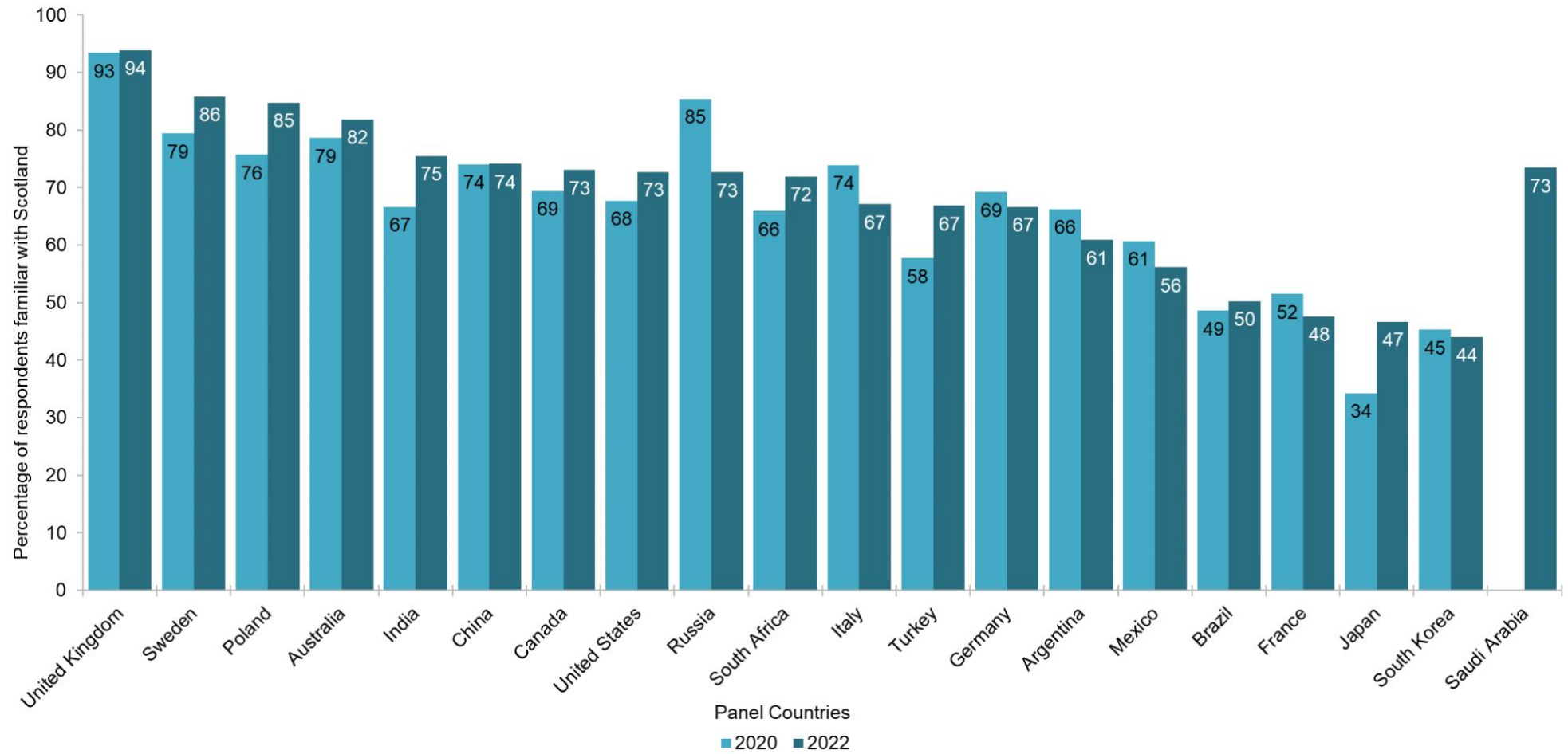
Between 2020 and 2022, levels of familiarity with Scotland increased the most in Japan (34 per cent in 2020 to 47 per cent in 2022), Poland (76 per cent in 2020 to 85 per cent in 2022) and Turkey (58 per cent in 2020 to 67 per cent in 2022). Levels of familiarity decreased the most in Russia, dropping by 12 percentage points (from 85 to 73 per cent). See Figure 4.

Respondents in Central and Eastern European, North American, Middle Eastern and African and Western European countries showed the greatest familiarity with Scotland in 2022 with average familiarity scores of 75, 73, 73, and 72 per cent respectively. Scotland received its lowest familiarity scores from respondents in Asian and Pacific (64 per cent) and Latin American countries (56 per cent).

²⁰ The United Kingdom sample includes Scotland.

When comparing familiarity scores from 2020 and 2022, familiarity with Scotland increased in the Middle East and Africa (from 66 to 73 per cent), Asia-Pacific (from 60 to 64 per cent), North America (from 69 to 73 per cent) and Central and Eastern Europe (from 73 to 75 per cent). Familiarity scores decreased in Western Europe (from 73 to 72 per cent) and Latin America (from 59 to 56 per cent).

Figure 4: Levels of familiarity with Scotland (2020 and 2022)



Favourability towards Scotland

At the start of the NBISM survey, respondents were asked to rate how favourable they are towards Scotland on a scale of 1.0 to 7.0 (with 1.0 being extremely unfavourable and 7.0 being extremely favourable).²¹

Table 3 shows that Scotland was rated relatively highly in terms of favourability (score of 5.0 out of 7.0) with a rank of 13th out of 60 participating nations. Scotland's favourability score has increased marginally from 2020 to 2022 (from 4.9 to 5.0) and its rank has improved one place from 14th to 13th.

Table 3: NBISM Favourability towards Scotland (2020 and 2022)

	Favourability	
	Rank	Score
2020	14	4.9
2022	13	5.0

Variations between panel countries

Figure 5 shows levels of favourability towards Scotland across the 20 panel countries in 2020 and 2022. None of the 20 core panel countries gave Scotland a favourability score below 4.5 (on a scale of 1.0 to 7.0) in 2022. This suggests that Scotland is viewed comparatively positively by all panel countries.

Respondents in the United Kingdom²² (5.5), India (5.4), and Italy, Canada, Australia and Sweden (all 5.3) tended to be the most favourable towards Scotland in 2022. Respondents in Japan and South Korea were the least favourable towards Scotland, both scoring Scotland 4.5 out of 7.0 in 2022. Even though respondents in Japan were the least favourable towards Scotland, the score is above the midway point, highlighting that respondents in Japan tend to have favourable views of Scotland. See Figure 5.

In 2022, the NBISM respondents in the panel countries were marginally more favourable towards Scotland than in 2020 (average favourability score of 4.9 out of 7.0 in 2020 and 5.0 in 2022). The greatest increase in favourability towards Scotland during this period could be found in India (from 5.0 to 5.4) and Turkey (from 4.4 to 4.8), while the greatest decline in favourability towards Scotland was in Russia (from 5.2 to 4.7). See Figure 5.

Geographical regions range in favourability from 5.3 in Western European and North American countries, followed by Asia/Pacific countries and Middle Eastern and African

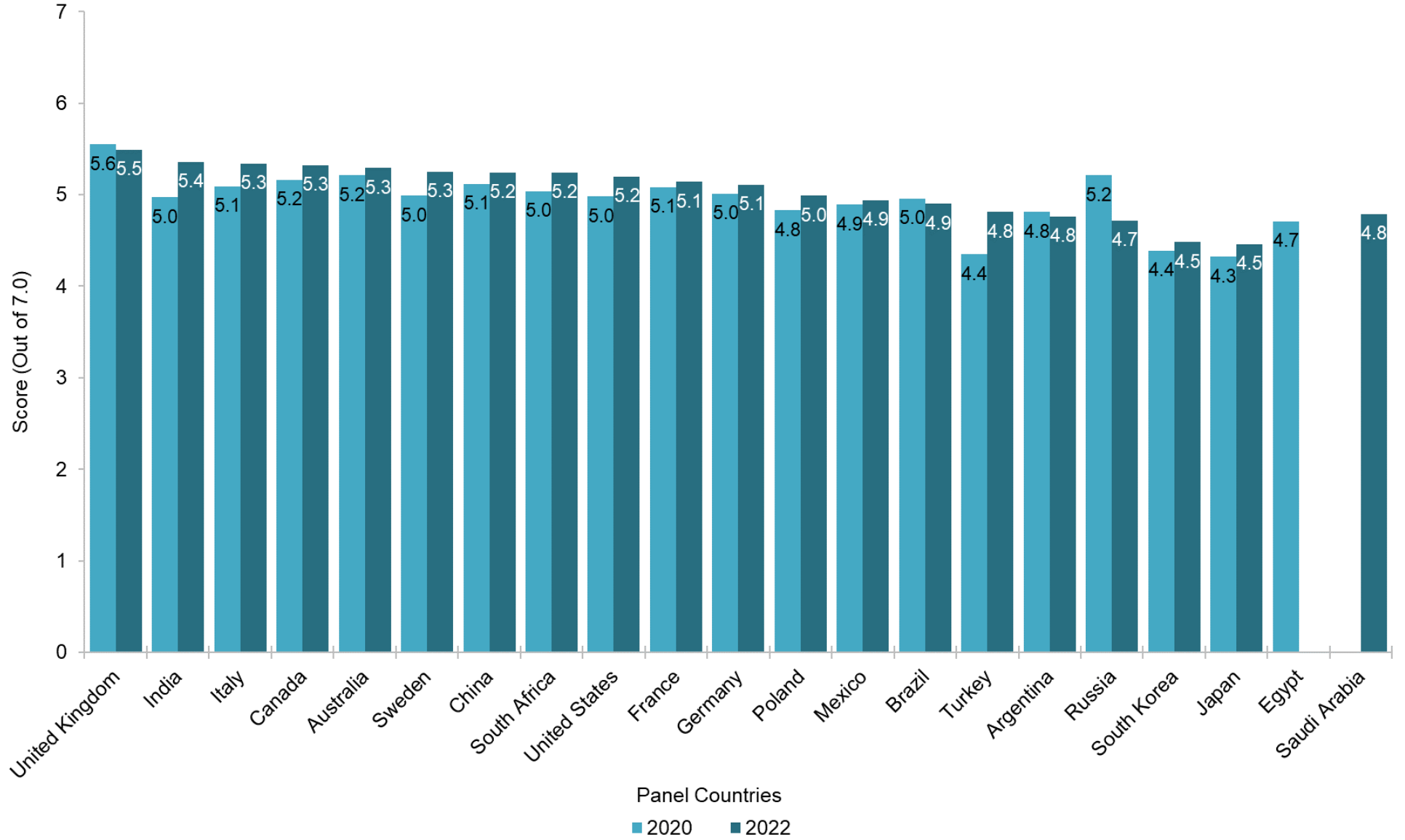
²¹ An average of scores from respondents from each of the panel countries on their overall opinion of Scotland is calculated. Responses are given on a scale from 1.0 (extremely unfavourable) to 7.0 (extremely favourable) with 4.0 being neither favourable nor unfavourable.

²² The United Kingdom sample includes Scotland.

countries (both 5.0), Latin American countries (4.9), and Central and East European countries (4.8).

Between 2020 and 2022 there was little to no difference in geographical regions' favourability towards Scotland. Levels of favourability towards Scotland either increased by 0.1 or 0.2 points or were maintained over this period.

Figure 5: NBISM Levels of favourability towards Scotland (2020 and 2022)



Scotland's six dimensions of reputation

The Anholt-Ipsos NBISM explores a country's image by examining six dimensions of national competence, all of which are weighted equally and together to make up the NBISM score.²³²⁴ Each dimension is comprised of various attributes. The six dimensions and their associated attributes are:

Exports: Perceptions 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.

Immigration and Investment: A country's appeal as a place to live, work, invest or study, how people perceive a country's economic and social situation.

Governance: Perceptions of a country's government competency and fairness, as well as its perceived commitment to global issues such as peace, poverty and the environment.



Tourism: The level of interest in visiting a country and the draw of its natural beauty, historic built environment and city attractions.

Culture: Perceptions of a country's cultural heritage; appreciation of its contemporary culture and perceptions of its sporting excellence.

People: A country's reputation for employability; how open and welcoming its people are perceived to be; appeal of the people on a personal level.

²³ The NBISM score is an average of the scores from the six NBISM dimensions. Each of the six dimensions is an average of the scores of the ratings questions from the dimension's attributes. There are between three and five attributes for each of the dimensions.

²⁴ For dimension calculations, the responses to each attribute are converted from its original seven point scale to a 1-100 scale. That is done by creating a new score for each attribute. Each of the six dimensions are created, for each country, by calculating a respondent's mean of the newly transformed scores of the attributes that make up that dimension.

Figure 6 displays Scotland's 2020 and 2022 performance across the six dimensions. Overall Scotland has a strong and balanced image, and is rated as a Top 20 country on five of the six dimensions of reputation, which is comparable to the 2020 results.

In 2022, Scotland's rank, relative to 2020, was higher on four of the six dimensions (Exports, Governance, Culture, and People) and maintained on the Tourism and Immigration and Investment dimensions. See Figure 5.

Scotland's most positive dimension in terms of rank in 2022 was Governance (11th out of 60), while Scotland's least positive dimension was Exports (21st). Similarly to the 2020 survey, Exports was Scotland's only dimension to rank outside of the Top 20. See Figure 6.

Figure 7 (see p.26) illustrates the difference in average scores across the six dimensions given to Scotland by respondents in the different geographic regions of the world. All geographical areas scored the Tourism dimension the highest (scores ranging from 69.7 for Asia and Pacific to 74.2 for North America) and the Exports dimension the lowest (scores ranging from 57.3 for Central and Eastern Europe to 65.1 for Middle East and Africa). Middle East and Africa, on average, scored Scotland the highest (69.3) followed by North America (66.6). Central and Eastern Europe scored Scotland the lowest (62.7).

The following section investigates each of the six dimensions in turn.²⁵

²⁵ Dimension scores are presented as a score out of 100, calculated as an average of the scores given for the underlying attributes (e.g. the Exports dimension is an average of the attributes: contribution to innovation and science, products and services and country as a creative place).

Figure 6: NBISM Scotland's performance across the six dimensions of reputation (2020 and 2022)

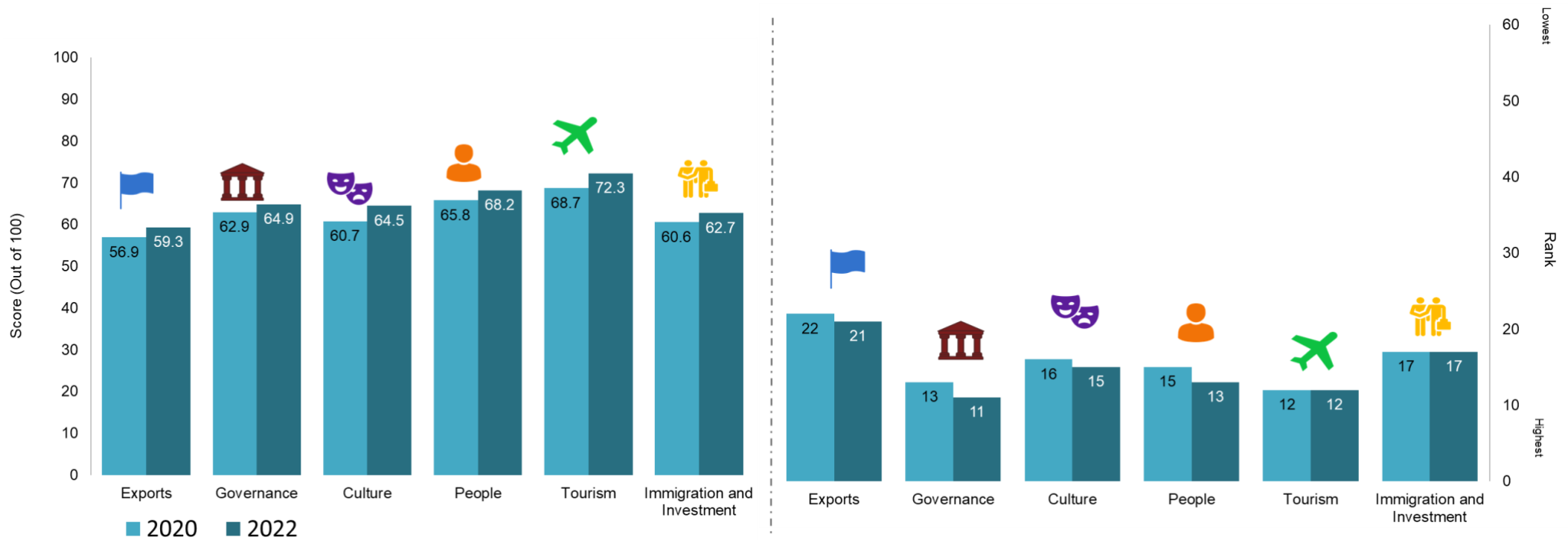
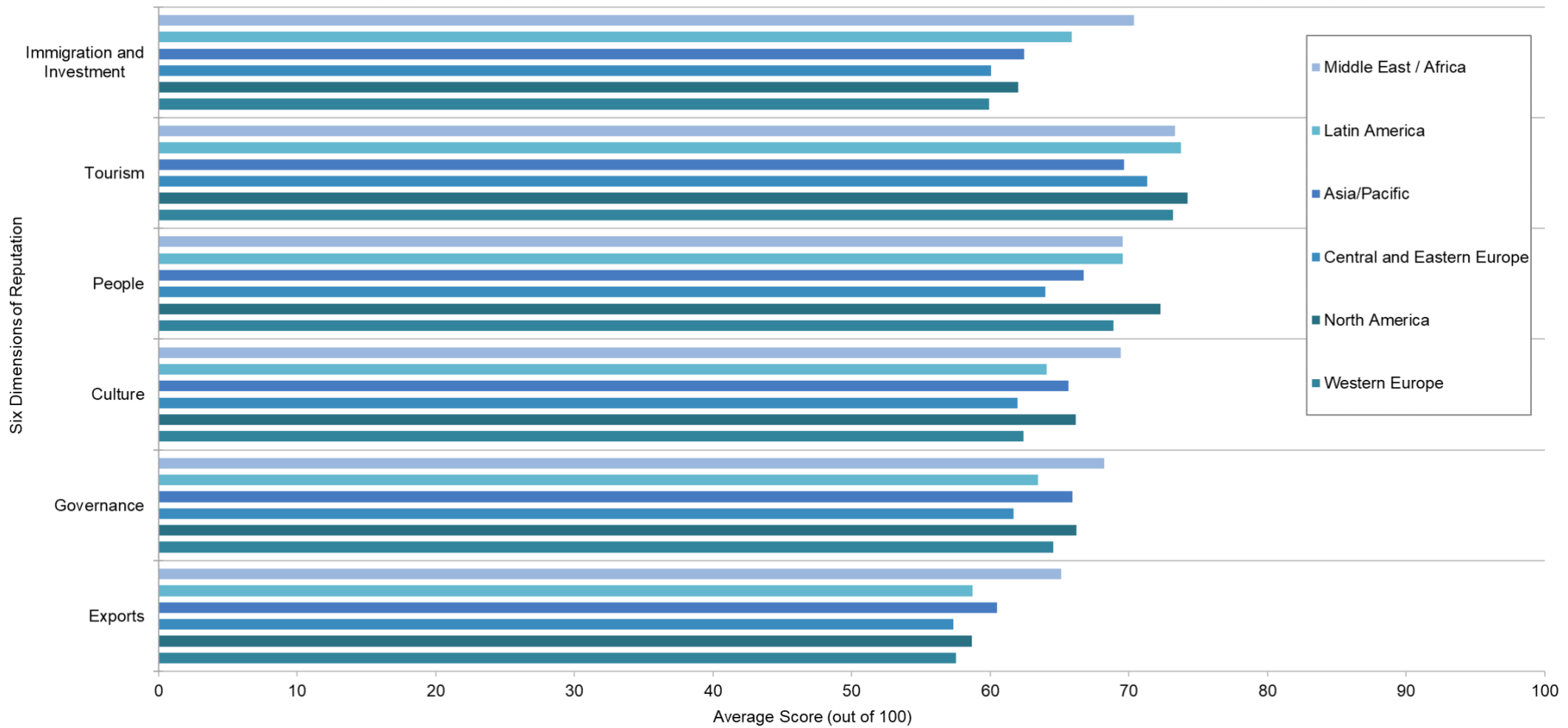


Figure 7: NBISM Scotland's six dimensions of reputation by geographic region (2022)



Exports



The Exports dimension aims to provide a sense of the economic strength and potential of a country, by asking three questions which cover the following attributes: 1) whether a country makes a major contribution to innovation, science and technology; 2) whether you would feel better or worse about buying products from a country; and 3) whether a country is a creative place with cutting-edge ideas and new ways of thinking.

Table 4 shows that Scotland received an overall score of 59.3 for the Exports dimension in 2022 (up from 56.9 in 2020). This gave Scotland a ranking of 21st out of the 60 participating nations in 2022 (up from 22nd in 2020). This is the lowest score and rank that Scotland received for any dimension.

Table 4: NBISM Scotland's reputation for Exports (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
Exports Overall	22	21	56.9	59.3
Contribution to innovation and science	24	26	4.2	4.4
Products and services	18	18	4.5	4.6
Country as a creative place	21	21	4.4	4.6

Respondents in the United Kingdom²⁶ (8th), and Canada and the United States (both 15th) gave Scotland the highest rankings for Exports overall. Respondents in Saudi Arabia (35th) and India (29th) gave Scotland the lowest rankings for Exports.

Exports attributes²⁷

The scores for each of Scotland's attributes in the Exports dimension were very similar in 2020 and 2022. The highest scoring attributes in the Exports dimension were 'Products and services' and 'Country as a creative place' (both receiving a score of 4.6 out of 7.0). Whilst the score for 'Contribution to innovation and science' has gone up, the rank for this attribute has decreased.²⁸

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its 'Products and services' (18th). However, Scotland's 'Contribution to innovation and science' (26th), and 'Country as a creative place' (21st), ranked outside the

²⁶ The United Kingdom sample includes Scotland.

²⁷ The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

²⁸ This is because rank is responsive to changes in the sample of countries being evaluated while absolute score is not.

Top 20. 'Contribution to innovation and science' is Scotland's lowest ranked attribute across the six dimensions.

Exports word association

Respondents were asked to select, from a predetermined list, the products or services they most associated with Scotland. Respondents could choose as many responses as they liked.

Figure 8 shows the products or services that were most commonly associated with Scotland. These were 'Agriculture' (28 per cent) followed by 'Food' (25 per cent) and 'Crafts' (19 per cent), whilst the least commonly associated words were 'Automotive' and 'Oil' (seven per cent each). Twenty-eight per cent of respondents selected 'None of these'.

Figure 8: Products or services most associated with Scotland (2022)



Governance



The Governance dimension aims to explore perceptions of how a country is governed domestically, by asking five questions which cover the following attributes: whether a country 1) is competently and honestly governed, 2) respects rights of its citizens and treats them with fairness, 3) behaves responsibly in international peace and security, 4) behaves responsibly to protect the environment and 5) behaves responsibly to help reduce world poverty.

Governance, perceived as one of Scotland's strongest national competencies, ranked 11th across all 60 countries in the Index. Table 5 shows that Scotland's score for the Governance dimension increased from 62.9 in 2020 to 64.9 in 2022, and its rank increased by two places (from 13th in 2020 to 11th in 2022). Governance is Scotland's highest ranking dimension.

Table 5: NBISM Scotland's reputation for Governance (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
Governance Overall	13	11	62.9	64.9
Competent and honest	13	11	4.8	4.9
Fair and respectful of citizens' rights	12	11	5.0	5.1
International peace and security	12	10	4.9	5.0
Environmental protection	10	11	4.8	4.9
Efforts to reduce global poverty	14	14	4.4	4.6

Respondents in the United States (3rd), Italy (8th) and Canada (9th) ranked Scotland the highest for Governance overall. Respondents in Saudi Arabia (28th), South Korea (21st) and India and Turkey (both 20th) gave Scotland the lowest rankings for Governance.

Governance attributes²⁹

Scotland's attribute scores for the Governance dimension ranged from 4.6 ('Efforts to reduce global poverty') to 5.1 ('Fair and respectful of citizens' rights'). These scores were all marginally higher than those observed in 2020.

When attribute scores were compared to other participating nations, Scotland ranked within the Top 15 for all the Governance attributes. The only attribute which saw a decrease in its ranking between 2020 and 2022 was 'Environmental protection' (from 10th to 11th). Three of the other attribute rankings increased and one maintained.

²⁹ The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

Governance word association

Respondents were asked to select, from a predetermined list, the one adjective that most accurately described Scotland's government.

Figure 9 shows the adjectives that were most commonly used to describe Scotland's Government.³⁰ The most commonly used adjectives were 'Reliable' (34 per cent) followed by 'Trustworthy' (30 per cent). The least common adjectives were 'Dangerous' and 'Corrupt' (both three per cent). Nineteen per cent of respondents selected 'None of these'.

Figure 9: Words associated with the government of Scotland (2022)



³⁰ The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

Culture



The Culture dimension measures three elements of a country's cultural reputation, by asking three questions which cover the following attributes: whether a country 1) excels at sports, 2) has a rich cultural heritage and 3) is an interesting and exciting place for contemporary culture such as music, films, art and literature.

Table 6 shows that Scotland received an overall score of 64.5 for the Culture dimension in 2022, up 3.8 points since 2020. Scotland's rank also increased by one place (from 16th in 2020 to 15th in 2022). See Table 6.

Table 6: NBISM Scotland's reputation for Culture (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
Culture Overall	16	15	60.7	64.5
Excellence at sports	23	25	4.2	4.4
Cultural heritage	11	11	5.1	5.3
Contemporary culture	14	12	4.6	4.8

Scotland received its highest rank from respondents in the United Kingdom³¹, Italy and Canada (all 10th). Respondents in Saudi Arabia (33rd), Argentina and Mexico (both 24th) ranked Scotland the lowest for Culture.

Culture attributes³²

Scotland's attribute scores for the Culture dimension ranged from 4.4 ('Excellence at sports') to 5.3 ('Cultural heritage') in 2022, and all scores increased slightly from 2020. The attribute 'Excellence at sports' was one of Scotland's lowest scoring attributes.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its 'Cultural heritage' (11th) and 'Contemporary culture' (12th), both placing in the Top 15. However, 'Excellence at sports' ranked outside the Top 20 at 25th. The ranking of one attribute increased, one decreased, and one maintained.

³¹ The United Kingdom sample includes Scotland.

³² The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

Culture word association

Respondents were asked to select, from a predetermined list, the cultural activities or products most expected to see produced in Scotland. Respondents could choose as many responses as they liked.

Figure 10 shows the cultural activities or products that were most commonly expected to see produced in Scotland.³³ These were 'Museums' (34 per cent) and 'Music' (29 per cent), whilst the least commonly expected cultural activities or products were 'Circus' (eight per cent) and 'Pop Videos' (11 per cent). Twenty-three per cent of respondents selected 'None of these'.

Figure 10: Cultural activities or products most expected to see produced in Scotland (2022)



³³ The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

People



The People dimension explores respondents' perceptions of people in Scotland, by asking three questions which cover the following attributes: 1) would people from the country make you feel very welcome, 2) would you like a person from the country as close friend and 3) would you be willing to hire well-qualified people from the country.

The People dimension ranked 13th across all 60 countries in the Index. Table 7 shows that in 2022 Scotland received an overall score of 68.2, an increase from 2020 (65.8). Scotland continues to be highly regarded for its People dimension, featuring in the Top 15 countries overall since 2020.

Table 7: NBISM Scotland's reputation for People (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
People Overall	15	13	65.8	68.2
Make you feel welcome	11	9	4.9	5.0
Friendly	13	13	4.9	5.0
Valuable employees	17	17	5.0	5.2

Respondents in Canada (3rd) and United States and Australia (both 4th) ranked Scotland's People dimension the highest. Respondents in Saudi Arabia (36th), China (24th) and Russia, South Korea and Argentina (all 23rd) ranked Scotland the lowest.

People attributes³⁴

Scotland's attribute scores for the People dimension ranged from 5.0 ('Make you feel welcome' and 'Friendly') to 5.2 ('Valuable employees') in 2022. All of Scotland's attribute scores increased marginally from 2020 to 2022.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for all the People attributes, all of which ranked in the Top 20. Two of the attribute ranks maintained and one increased from 2020.

³⁴ The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

People word association

Respondents were asked to select, from a predetermined list, the adjectives that most accurately describe people in Scotland. Respondents could choose as many responses as they liked.

Figure 11 shows the adjectives that were most commonly used to describe people in Scotland.³⁵ These were 'Hard-working' (34 per cent) followed by 'Honest' (29 per cent) and 'Skilful' (27 per cent), whilst the least commonly used adjectives were 'Unreliable', 'Lazy' and 'Ignorant' (four per cent each). Eighteen per cent of respondents selected 'None of these'.

Figure 11: Words associated with the people of Scotland (2022)



³⁵ The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

Tourism



The Tourism dimension focuses on respondents' perceptions of a country's attractiveness as a tourist destination, by asking four questions which cover the following attributes: 1) willingness to visit the country should money be no object, 2) whether the country is rich in natural beauty, 3) whether the country is rich in historic buildings and monuments and 4) whether the country has a vibrant city life and urban attractions.

Table 8 shows that Scotland's score for the Tourism dimension increased from 68.7 in 2020 to 72.3 in 2022. Tourism continues to be one of Scotland's strongest dimensions, ranking 12th out of the participating countries in both 2020 and 2022.³⁶ This dimension received the highest score and the second highest rank.

Table 8: NBISM Scotland's reputation for Tourism (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
Tourism Overall	12	12	68.7	72.3
Would visit if money were no object	14	14	5.2	5.3
Natural beauty	7	7	5.4	5.6
Historic buildings and monuments	12	10	5.0	5.3
Vibrant cities and urban attractions	18	18	4.8	5.0

Respondents in the United Kingdom (3rd);³⁷ Canada (4th); Germany (5th); Australia (6th); France, Italy, Sweden and the United States (all 7th); and Poland (9th) ranked Scotland in the Top 10 nations for Tourism. Respondents in Saudi Arabia (28th) and South Korea (21st) ranked Scotland the lowest. All remaining rankings were in the Top 20.

Tourism attributes³⁸

Scotland's attribute scores for the Tourism dimension range from 5.0 ('Vibrant cities and urban attractions') to 5.6 ('Natural beauty'). All attributes' scores have increased slightly from 2020.

'Natural beauty' continues to be perceived as Scotland's strongest attribute across all dimensions, ranking 7th comparing attribute scores with other participating nations. Scotland was ranked in the Top 15 nations for the attributes 'Historic buildings and monuments' (10th) and 'Would visit if money were no object' (14th). Three attributes maintained in their ranking and one improved.

³⁶ Out of 50 participating nations in 2020 and 60 in 2022.

³⁷ The United Kingdom sample includes Scotland.

³⁸ The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

Tourism word association

Respondents were asked to select, from a predetermined list, the words that most accurately describe the experience of visiting Scotland. Respondents could choose as many responses as they liked.

Figure 12 shows the words that were most commonly associated with the experience of visiting Scotland.³⁹ These were 'Fascinating' (36 per cent), 'Exciting' and 'Relaxing' (both 30 per cent), whilst the least commonly associated words were 'Depressing' (three per cent) as well as 'Risky' and 'Stressful' (three per cent each). Fifteen per cent of respondents selected 'None of these'.

Figure 12: Words associated with the experience of visiting Scotland (2022)



³⁹ The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

Immigration and Investment



The Immigration and Investment dimension explores whether respondents perceive a country to be a good place to live, work, study and invest in, by asking five questions which cover the following attributes: 1) willingness to live and work in the country for a substantial period, 2) whether the country is a place with a high quality of life, 3) whether the country is a good place to study for educational qualifications, 4) whether the country has businesses you'd like to invest in, and 5) whether the country cares about equality in society.

Table 9 shows that Scotland's score for the Immigration and Investment dimension increased from 60.6 in 2020 to 62.7 in 2022. Scotland was ranked 17th out of 60 participating nations in 2022. See Table 9.

Table 9: NBISM Scotland's reputation for Immigration and Investment (2020 and 2022)

	Rank		Score	
	2020	2022	2020	2022
Immigration and Investment Overall	17	17	60.6	62.7
Willingness to live and work	14	14	4.4	4.6
Quality of life	17	17	5.0	5.1
Educational qualifications	18	18	4.7	4.9
Business to invest in	17	19	4.2	4.3
Equal opportunity	12	13	4.7	4.9

Respondents in the United Kingdom⁴⁰ (3rd), United States (9th) and Sweden (11th) gave Scotland the highest rankings for Immigration and Investment. Scotland received its lowest rank from respondents in Saudi Arabia (23rd), followed by India (21st).

Immigration and Investment attributes⁴¹

Scotland's attribute scores for Immigration and Investment ranged from 4.3 ('Business to invest in') to 5.1 ('Quality of life'). All of the Immigration and Investment attributes have increased slightly in score between 2020 and 2022. See Table 9.

When attribute scores were compared to other participating nations, Scotland ranked within the Top 20 for all of the Immigration and Investment attributes. Three attributes maintained their rank from 2020 to 2022, and two have decreased. See Table 9.

⁴⁰ The United Kingdom sample includes Scotland.

⁴¹ The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

Immigration and Investment word association

Respondents were asked to select, from a predetermined list, the one adjective they thought most accurately described the current economic and business conditions in Scotland.

Figure 13 shows the words that were most commonly associated with Scotland's economic and business conditions.⁴² These were 'Modern' (30 per cent), 'Forward-thinking' (25 per cent) and 'Developing' (23 per cent), whilst the least commonly associated words were 'Backward' (four per cent) and 'Declining' (five per cent). Twenty per cent of respondents selected 'None of these'.

Figure 13: Words associated with Scotland's economic and business conditions (2022)

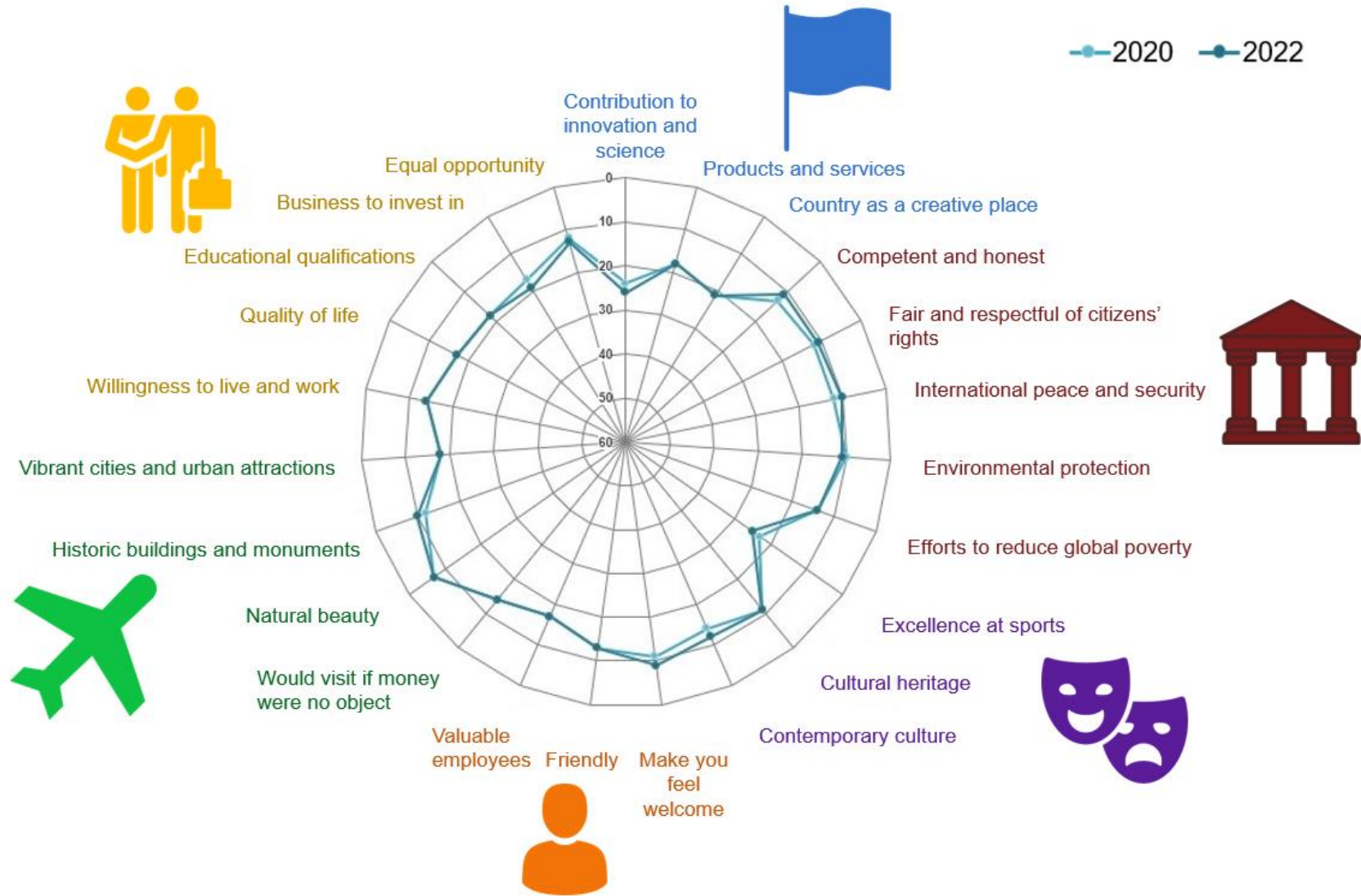


Summary

Using the concept of the NBISM hexagon, the 23 attributes across the six dimensions are visually summarised in Figure 14 (see next page), where the centre of the circle represents the position of rank 60 (least reputable), and the outer circle represents the first (most reputable) position.

⁴² The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

Figure 14: NBISM Scotland's reputation across the 23 attributes by rank (2020 and 2022)



How Scotland sees itself

In the 2010, 2012, 2014, 2016, 2018, 2020 and 2022 NBISM surveys, Scotland was included as an additional core panel country, with 500 interviews carried out in Scotland, to explore how Scotland sees itself.⁴³ Figure 15 illustrates how Scotland has scored itself since 2010.

Respondents in Scotland scored Scotland marginally lower in 2022 than in 2020 (75.8 and 75.9 respectively). Scotland maintained its ranking of 1st over this period. See Figure 15.

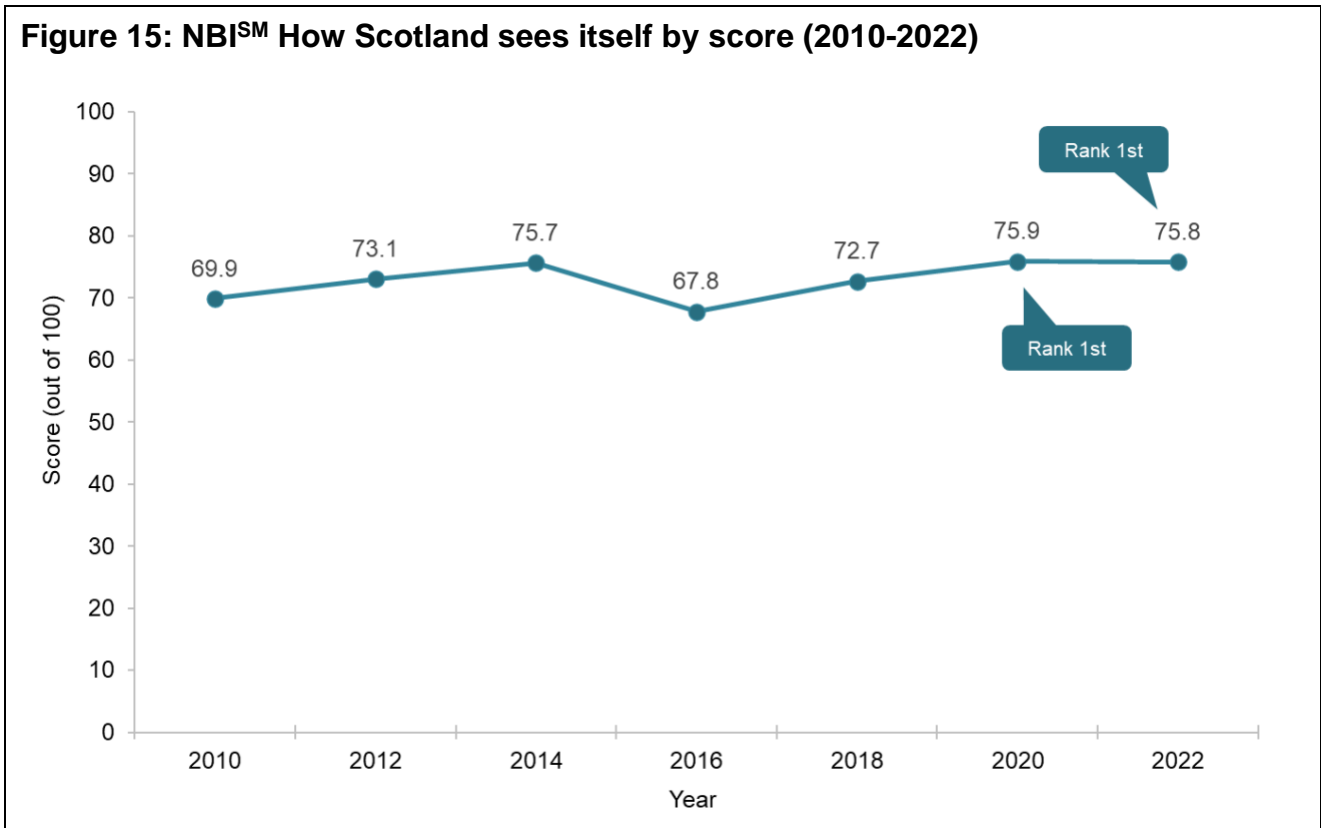


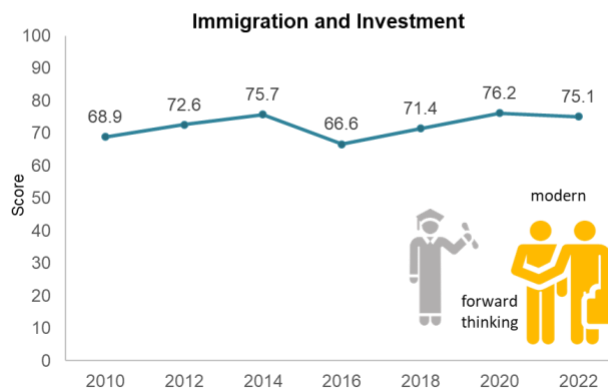
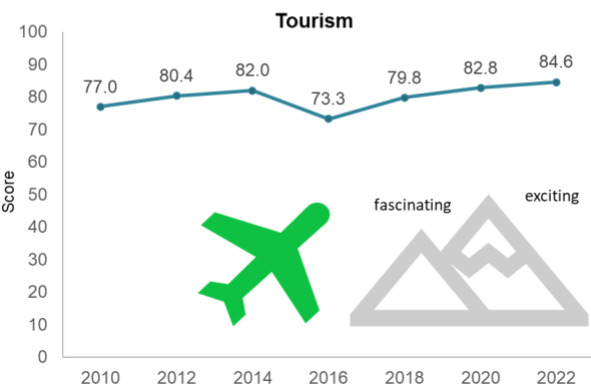
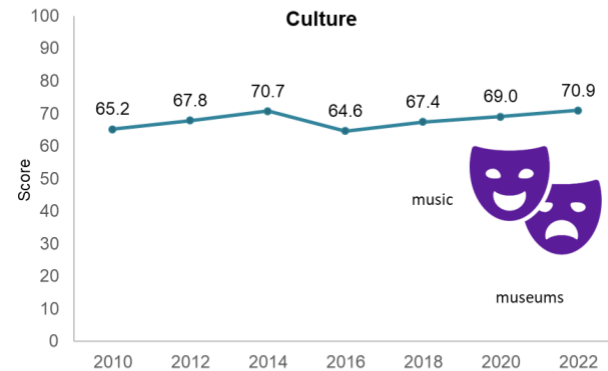
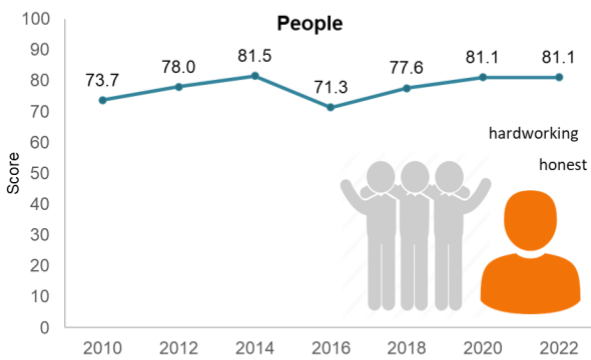
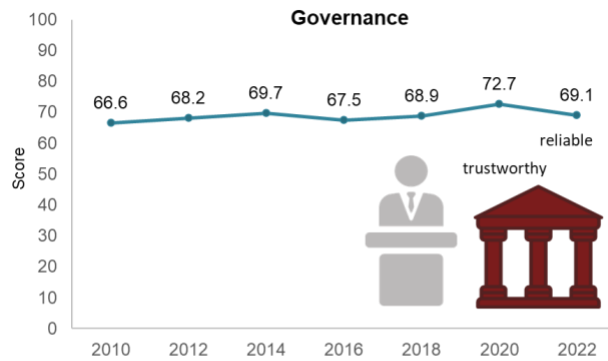
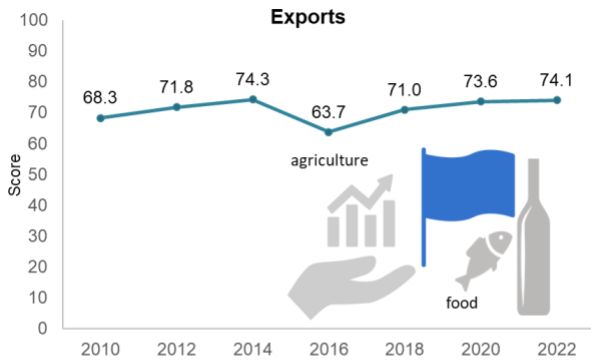
Figure 16 illustrates the score for how Scotland viewed itself across the six dimensions of reputation between 2010 and 2022. The score for how Scotland viewed itself increased each year between 2010 and 2014 across all six dimensions. This was followed by a decrease in scores across all six dimensions between 2014 and 2016 by an average of eight points. The scores of all but two dimensions have increased or maintained between 2016 and 2022.

The dimension which experienced the greatest increase between 2020 and 2022 was Culture, rising by 1.9 points. Tourism (from 82.8 in 2020 to 84.6 in 2022) and Exports (from 73.6 in 2020 to 74.1 in 2022) also saw an increase. While the People dimension has

⁴³ The data collected from these respondents are exclusively for the Scottish Government. Therefore, this information is not shared with any other client.

maintained at 81.1, Governance decreased from 72.7 in 2020 to 69.1 in 2022 and Immigration and Investment from 76.2 in 2020 to 75.1 in 2022.

Figure 16: NBISM How Scotland sees itself according to the six dimensions of reputation by score (2010-2022)



In terms of rank, respondents consistently ranked Scotland 1st overall between 2010 and 2014. In 2016, Scotland did not rank itself 1st overall or on any of the six dimensions. In addition, each dimension fell by an average of three places. However, between 2018 and 2022, respondents once again ranked Scotland 1st overall. For individual dimensions respondents ranked Scotland 1st for half of the dimensions in 2022 (People, Tourism, Immigration and Investment) and 2nd for Exports, 3rd for Governance and 5th for Culture. See Table 10.

Table 10: NBISM How Scotland sees itself according to the six dimensions of reputation by rank (2010-2022)

	Rank						
	2010	2012	2014	2016	2018	2020	2022
Exports	3	2	2	5	2	1	2
Governance	1	1	1	4	3	1	3
Culture	3	3	3	8	4	3	5
People	1	1	1	4	1	1	1
Tourism	1	1	1	3	1	1	1
Immigration and Investment	1	1	1	3	1	1	1
Overall	1	1	1	3	1	1	1

Tables 11 and 12 (see next two pages) show the score and rank for dimensions disaggregated by their underlying attributes. In 2022, Scotland's view of itself, in terms of score, was higher than 2020 on 10 of the 23 attributes within the dimensions.⁴⁴ All increases were 0.3 points or less. Three attributes maintained over this period and 10 decreased. All decreases were from 0.1 to 0.6 points. See Table 11.

In terms of rank, Scotland's view of itself maintained across 13 of the 23 attributes between 2020 and 2022. None of the attribute ranks increased while 10 ranks decreased during this period. The biggest decreases can be seen in 'Competent and honest' (from 1st to 11th) and 'Quality of life' (from 2nd to 11th). See Table 12. However, when looking at scores, the changes were more moderate with the score for 'Competent and honest' decreasing from 5.4 in 2020 to 4.8 in 2022, and the score for 'Quality of life' decreasing from 5.6 in 2020 to 5.4 in 2022. See Table 11.

In terms of favourability, respondents consistently ranked Scotland 1st between 2010 and 2014. However, in 2016, respondents ranked Scotland 3rd overall behind the United Kingdom (1st) and Canada (2nd). Between 2018 and 2022, Scotland ranked itself 1st again on how favourable respondents were towards Scotland. In 2022, respondents gave Scotland a score of 6.2 for favourability, down from 6.4 in 2020 (on a 1.0 to 7.0 scale). See Table 13.

⁴⁴ Note that the figures in Table 11 have been rounded.

Respondents in Scotland consistently scored and ranked Scotland more highly than respondents in the 20 panel countries. Most notably, respondents in Scotland scored Exports 74.1 (out of 100) overall, compared to other respondents' score of 59.3. For the People dimension, respondents in Scotland scored Scotland 81.1 compared to 68.2 by respondents in the 20 panel countries.

Table 11: NBISM How Scotland sees itself disaggregated by the 23 attributes by score (2010 – 2022)

	2010	2012	2014	2016	2018	2020	2022
Exports	68.3	71.8	74.3	63.7	71.0	73.6	74.1
Contribution to Innovation and Science	5.1	5.3	5.4	4.7	5.1	5.2	5.3
Products and services	5.3	5.5	5.6	5.0	5.5	5.7	5.6
Country as a creative place	4.9	5.1	5.3	4.7	5.1	5.3	5.4
Governance	66.6	68.2	69.7	67.5	68.9	72.7	69.1
Competent and honest	4.9	4.9	4.9	4.9	5.0	5.4	4.8
Fair and respectful of citizens' rights	5.2	5.3	5.4	5.3	5.3	5.6	5.4
International peace and security	5.3	5.3	5.4	5.3	5.4	5.6	5.5
Environmental protection	4.8	5.0	5.1	5.0	5.1	5.3	5.2
Efforts to reduce global poverty	4.7	4.8	5.0	4.8	4.7	4.8	4.8
Culture	65.2	67.8	70.7	64.6	67.4	69.0	70.9
Excellence at sports	4.2	4.4	4.7	4.4	4.4	4.4	4.5
Cultural heritage	5.5	5.6	5.7	5.3	5.6	5.8	5.9
Contemporary culture	4.9	5.1	5.3	4.8	5.1	5.2	5.4
People	73.7	78.0	81.5	71.3	77.6	81.1	81.1
Make you feel welcome	5.5	5.8	6.0	5.2	5.7	5.9	6.0
Friendly	5.3	5.5	5.8	5.1	5.6	5.8	5.7
Valuable employee	5.4	5.6	5.8	5.4	5.7	5.9	5.9
Tourism	77.0	80.4	82.0	73.3	79.8	82.8	84.6
Would visit if money were no object	5.6	5.9	6.1	5.4	5.9	6.2	6.1
Natural beauty	5.9	6.1	6.2	5.6	6.0	6.2	6.3
Historic buildings and monuments	5.7	5.9	5.9	5.4	5.7	5.9	6.2
Vibrant cities and urban attractions	5.2	5.4	5.4	5.1	5.5	5.5	5.7
Immigration and investment	68.9	72.6	75.7	66.6	71.4	76.2	75.1
Willingness to live and work	5.6	6.0	6.2	5.0	5.8	6.3	6.2
Quality of life	5.2	5.3	5.5	5.1	5.2	5.6	5.4
Educational qualifications	5.5	5.6	5.7	5.2	5.5	5.7	5.8
Business to invest in	4.5	4.6	4.9	4.4	4.6	4.8	4.7
Equal opportunity	4.9	5.2	5.4	5.2	5.3	5.4	5.4

Table 12: NBISM How Scotland sees itself disaggregated by the 23 attributes by rank (2010 – 2022)

	2010	2012	2014	2016	2018	2020	2022
Exports	3	2	2	5	2	1	2
Contribution to Innovation and Science	4	4	4	10	6	5	5
Products and services	2	1	1	2	2	1	2
Country as a creative place	4	4	4	9	4	1	3
Governance	1	1	1	4	3	1	3
Competent and honest	3	4	8	8	7	1	11
Fair and respectful of citizens' rights	1	1	5	3	3	1	4
International peace and security	1	1	1	3	1	1	1
Environmental protection	1	1	1	4	3	1	3
Efforts to reduce global poverty	1	2	1	3	1	1	1
Culture	3	3	3	8	4	3	5
Excellence at sports	17	14	12	15	16	18	20
Cultural heritage	1	1	1	6	2	1	1
Contemporary culture	3	2	3	4	3	1	1
People	1	1	1	4	1	1	1
Make you feel welcome	1	1	1	5	1	1	1
Friendly	1	1	1	4	1	1	1
Valuable employee	2	1	2	3	2	1	1
Tourism	1	1	1	3	1	1	1
Would visit if money were no object	2	1	1	8	1	1	1
Natural beauty	1	1	1	2	1	1	1
Historic buildings and monuments	1	1	1	6	2	1	1
Vibrant cities and urban attractions	3	3	4	7	2	2	4
Immigration and investment	1	1	1	3	1	1	1
Willingness to live and work	2	1	1	2	1	1	1
Quality of life	5	5	4	9	9	2	11
Educational qualifications	2	1	2	4	1	1	1
Business to invest in	2	1	1	5	2	1	2
Equal opportunity	1	1	1	2	1	1	2

Table 13: NBISM How Scotland sees itself by Favourability (2018 – 2022)

	Favourability	
	Rank	Score
2020	1	6.4
2022	1	6.2

Conclusion

Scotland's score of 65.3 and rank of 15th on the NBISM show that Scotland continues to have a strong reputation abroad. Countries that did better than Scotland and ranked in the Top 10 were Germany, Japan, Canada, Italy, France, United Kingdom, Switzerland, the United States, Sweden, and Australia.

Scotland received a higher score in 2022 (65.3) than it did in 2020 (62.6), with an overall increase of 2.7 points. Scotland's relative rank has increased by two places overall from 2020 to 2022, improving from 17th to 15th.

When all six NBISM dimensions of Scotland's reputation are considered Governance and Tourism continue to be the most highly regarded dimensions by respondents from around the world. Scotland's score has improved across all six dimensions from 2020. 'Natural beauty' continues to be perceived as Scotland's strongest attribute across all dimensions.

Exports continues to be Scotland's weakest dimension, receiving both the lowest score and the lowest rank. This is the only dimension to rank outside the Top 20. 'Contribution to innovation and science' (from the Exports dimension) is Scotland's lowest ranked attribute across the six dimensions.

Respondents from certain countries are more familiar with Scotland and therefore better able to judge its strengths. English-speaking countries, European neighbours, Commonwealth countries are the most favourable towards and familiar with Scotland. Respondents in Japan and South Korea were the least familiar and favourable towards Scotland, and Scotland received the lowest overall scores from these panel countries. Nonetheless, respondents in these countries ranked Scotland relatively well with those in South Korea ranking Scotland 21st and those in Japan ranking Scotland 17th.

As Scotland's score has increased by 2.7 points from 2020 to 2022, the change is above the 1.0 point threshold for the National Indicator 'Scotland's reputation' indicating that Scotland's reputation is 'improving' internationally.

Annex A: NBISM Scotland's dimensions and attributes by demographic group^{45 46}

This Annex contains tables of Scotland's score and rank for each of six dimensions and their underlying attributes broken down by gender, age, occupation and tourism.

Table 14: NBISM Familiarity with Scotland by gender, age, occupation and tourism (2022)

	Familiarity	
	Rank	Score
Gender		
Male	24	71
Female	22	66
Age		
18-29	35	62
30-44	22	71
45 +	22	70
Occupation		
Business/Executives	22	81
Other	24	64
Visited Scotland		
Yes	23	76
No	22	56
Visited a Scottish Website		
Yes	25	76
No	26	60

⁴⁵ All rankings presented in the report are out of 60.

⁴⁶ The overall score for each of the dimensions is out of 100, while the score for each of the attributes is an average of respondents' scores, based on a scale from 1.0 to 7.0 (1.0 being the lowest and worst and 7.0 being the highest and best).

Table 15: NBISM Favourability towards Scotland by gender, age, occupation and tourism (2022)

	Favourability	
	Rank	Score
Gender		
Male	15	5.0
Female	12	5.1
Age		
18-29	16	4.8
30-44	16	5.1
45+	9	5.1
Occupation		
Business/Executives	13	5.4
Occupation Other	13	4.9
Visited Scotland		
Yes	13	5.3
No	13	4.7
Visited a Scottish Website		
Yes	15	5.2
No	10	4.9

Table 16: NBISM Scotland's reputation score for Exports by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Exports Overall	59.4	59.2	58.8	61.5	58.1	63.9	57.5	61.9	55.4	63.4	54.8
Contribution to innovation and science	4.4	4.4	4.3	4.5	4.3	4.6	4.3	4.5	4.1	4.6	4.1
Products and Services	4.7	4.6	4.6	4.8	4.6	5.0	4.5	4.8	4.4	4.9	4.4
Country as a creative place	4.6	4.6	4.6	4.8	4.5	4.9	4.5	4.7	4.4	4.9	4.3

Table 17: NBISM Scotland's reputation rank for Exports by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Exports Overall	22	22	22	22	20	22	21	22	21	21	22
Contribution to innovation and science	25	24	25	27	25	26	26	25	26	26	25
Products and Services	19	18	19	18	17	17	18	16	19	19	17
Country as a creative place	22	22	21	22	22	22	21	22	21	21	23

Table 18: NBISM Scotland's reputation score for Governance by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Governance Overall	66.0	63.7	63.0	65.4	65.4	69.4	63.1	67.3	61.1	68.1	61.3
Competent and honest	4.9	4.8	4.7	4.9	4.9	5.2	4.7	5.0	4.6	5.0	4.7
Fair and respectful of citizens' rights	5.2	5.0	4.9	5.1	5.2	5.4	5.0	5.2	4.8	5.2	4.9
International peace and security	5.1	4.9	4.9	5.0	5.0	5.3	4.9	5.2	4.7	5.2	4.8
Environmental protection	4.9	4.8	4.8	4.9	4.9	5.1	4.8	5.0	4.7	5.1	4.6
Efforts to reduce global poverty	4.7	4.5	4.5	4.7	4.6	4.9	4.5	4.7	4.4	4.8	4.3

Table 19: NBISM Scotland's reputation rank for Governance by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Governance Overall	12	11	14	14	12	12	10	11	11	14	11
Competent and honest	12	12	14	13	14	12	12	14	11	13	11
Fair and respectful of citizens' rights	12	10	14	15	10	11	11	11	11	11	10
International peace and security	11	9	10	13	9	9	10	9	10	13	8
Environmental protection	11	12	11	11	11	12	11	12	11	12	10
Efforts to reduce global poverty	13	14	16	12	12	14	13	13	14	15	10

Table 20: NBISM Scotland's reputation score for Culture by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Culture Overall	64.3	64.7	63.3	65.8	64.2	68.3	63.0	66.3	61.7	68.0	60.7
Excellence at sports	4.4	4.4	4.4	4.5	4.4	4.7	4.4	4.6	4.3	4.7	4.2
Cultural heritage	5.2	5.3	5.1	5.3	5.4	5.5	5.2	5.4	5.1	5.4	5.1
Contemporary culture	4.8	4.8	4.8	4.9	4.8	5.1	4.8	4.9	4.7	5.1	4.6

Table 21: NBISM Scotland's reputation rank for Culture by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Culture Overall	15	14	18	16	13	15	14	15	13	16	13
Excellence at sports	22	25	24	24	23	22	25	23	23	23	24
Cultural heritage	11	9	13	11	8	11	11	9	11	11	9
Contemporary culture	11	12	16	12	12	13	12	12	11	12	11

Table 22: NBISM Scotland's reputation score for People by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
People Overall	68.1	68.3	66.7	69.1	68.3	72.5	66.5	70.4	64.8	71.7	64.3
Make you feel welcome	5.0	5.0	4.8	5.0	5.1	5.3	4.9	5.2	4.8	5.2	4.9
Friendly	5.0	5.0	5.0	5.1	5.0	5.3	4.9	5.1	4.8	5.3	4.7
Valuable employees	5.2	5.2	5.1	5.3	5.2	5.4	5.1	5.3	5.0	5.4	5.0

Table 23: NBISM Scotland's reputation rank for People by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
People Overall	15	10	17	15	10	11	14	14	12	16	9
Make you feel welcome	10	9	14	11	7	7	9	10	8	10	7
Friendly	15	12	16	15	10	11	14	12	14	14	10
Valuable employees	16	15	17	16	16	16	16	16	14	18	14

Table 24: NBISM Scotland's reputation score for Tourism by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Tourism Overall	71.4	73.1	69.8	73.0	73.0	76.2	70.8	74.4	69.1	75.3	69.0
Would visit if money were no object	5.3	5.4	5.2	5.4	5.3	5.6	5.2	5.5	5.1	5.6	5.1
Natural beauty	5.5	5.7	5.3	5.6	5.7	5.8	5.5	5.7	5.4	5.7	5.4
Historic buildings and monuments	5.3	5.4	5.1	5.4	5.4	5.6	5.3	5.5	5.2	5.5	5.2
Vibrant cities and urban attractions	5.0	5.1	5.0	5.1	5.0	5.3	4.9	5.2	4.8	5.2	4.8

Table 25: NBISM Scotland's reputation rank for Tourism by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Tourism Overall	12	9	14	12	7	12	11	10	12	12	9
Would visit if money were no object	15	11	15	15	10	12	13	12	11	14	11
Natural beauty	8	6	10	8	7	7	7	7	5	7	6
Historic buildings and monuments	11	8	12	10	8	10	10	10	10	10	7
Vibrant cities and urban attractions	19	19	23	20	18	19	17	19	18	21	17

Table 26: NBISM Scotland's reputation score for Immigration and Investment by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Immigration and Investment Overall	64.1	61.3	63.8	65.4	60.5	67.9	60.8	65.4	58.6	68.4	56.5
Willingness to live and work	4.7	4.5	4.8	4.8	4.3	5.0	4.4	4.8	4.3	5.0	4.1
Quality of life	5.1	5.0	5.1	5.2	5.0	5.3	5.0	5.2	4.9	5.3	4.8
Educational qualifications	4.9	4.9	4.9	5.0	4.8	5.1	4.8	5.0	4.7	5.2	4.6
Business to invest in	4.5	4.1	4.5	4.6	4.0	4.6	4.2	4.5	4.0	4.8	3.8
Equal opportunity	4.9	4.8	4.8	4.9	4.9	5.2	4.7	5.0	4.6	5.1	4.6

Table 27: NBISM Scotland's reputation rank for Immigration and Investment by gender, age, occupation and tourism (2022)

Demographic group→	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	Male	Female	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No
Immigration and Investment Overall	17	17	17	17	17	16	17	16	16	18	16
Willingness to live and work	15	12	15	13	13	10	14	14	12	13	12
Quality of life	16	17	15	16	17	17	17	17	18	17	17
Educational qualifications	17	17	18	18	16	16	18	16	18	18	16
Business to invest in	19	19	23	19	18	20	19	20	18	21	18
Equal opportunity	12	14	15	14	12	12	13	14	14	14	12

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